

# Magic Quadrant for Contact Center Infrastructure

18 June 2013 ID: G00248500

**Analyst(s):** Drew Kraus, Geoff Johnson, Steve Blood

## VIEW SUMMARY

The contact center infrastructure market has been consolidating, yet some lesser-known offerings may warrant strong consideration. Companies should evaluate vendors' technology and ability to deliver in relevant regions.

## Market Definition/Description

Gartner defines contact center infrastructure as the products (equipment, software and services) needed to operate call centers for telephony support and contact centers for multimedia support. This type of infrastructure is used by customer and employee service and support centers, inbound and outbound telemarketing services, help desk services, government-operated support centers, and other types of structured communications operations.

Contact center interactions can be people-assisted or automated self-service, using interactive voice response (IVR) and speech recognition technologies, for example. These channels for interaction use both live agents and messaging technology and include voice, Web, email, instant messaging, Web chat, social media, video and mobile devices.

Contact centers require a wide range of functions, architectures, features and services to be effective. Three major architectural approaches that are common in the market are integrated "best-of-breed" components, all-in-one bundled suites and service-based solutions. They are offered in the form of time division multiplexing circuit-switched solutions, Internet Protocol (IP)-based solutions (including Session Initiation Protocol-based solutions) and hybrids of the two.

Contact center infrastructure includes a wide range of related technologies, such as:

- Telephony infrastructure
- Multimedia contact routing and prioritization engines
- IVR and voice portals for self-service applications, including speech-enabled self-service
- Outbound dialing/proactive contact
- Virtual routing applications for multisite and work-at-home scenarios
- Presence tools
- Tools for integration with CRM software
- Data mart and analytics systems
- Computer-telephony integration (CTI)/Web services interfaces
- Email response management
- Web chat
- Collaborative browsing
- Social media
- Live and prerecorded video
- Knowledgebase self-service
- Workforce optimization (WFO) tools, including contact center workforce management, session recording and e-learning
- Workflow routing and management
- Mobile customer service applications

Increasingly, contact center managers prefer to purchase much, or all, of their contact center infrastructure from a single source in the pursuit of easier and enduring integration. Therefore, leading contact center infrastructure vendors offering complete portfolios of solutions, comprising their own products and those of partners and other strategic suppliers, are being favored. The emerging contact center as a service (CCaaS) model — involving hosted, multitenant systems — has not yet been widely deployed in the market, but it is gaining attention as cloud approaches increase. There are no CCaaS-only providers that currently offer a substantial-enough global presence to warrant inclusion in this document; however, all vendors covered in this document now provide some form of hosted or CCaaS offering. Coverage of the CCaaS space is provided in other Gartner documents, including "Market Trends: Contact Center as a Service, North America, 2012" and "Emerging Technology Analysis: Contact Center as a Service."

## EVALUATION CRITERIA DEFINITIONS

### Ability to Execute

**Product/Service:** Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships as defined in the market definition and detailed in the subcriteria.

**Overall Viability (Business Unit, Financial, Strategy, Organization):** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood that the individual business unit will continue investing in the product, will continue offering the product and will advance the state of the art within the organization's portfolio of products.

**Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support, and the overall effectiveness of the sales channel.

**Market Responsiveness and Track Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.

**Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This mind share can be driven by a combination of publicity, promotional initiatives, thought leadership, word of mouth and sales activities.

**Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups, service-level agreements and so on.

**Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure, including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

### Completeness of Vision

**Market Understanding:** Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and they can shape or enhance those with their added vision.

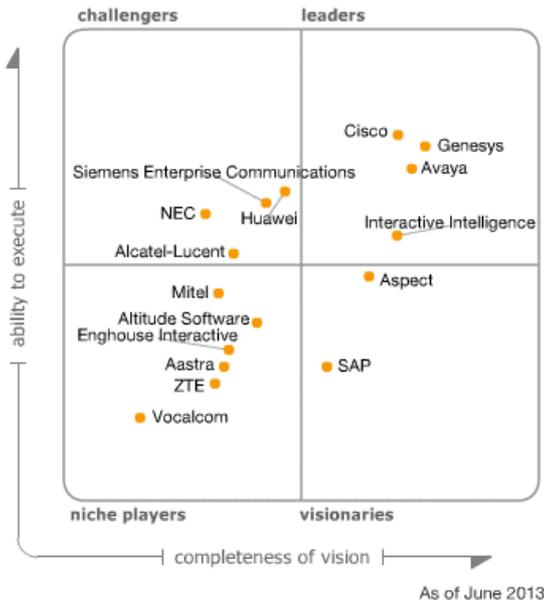
**Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.

**Sales Strategy:** The strategy for selling products that uses the appropriate network of direct and indirect sales, marketing, service and communications affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.

**Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature sets as they map to current and future requirements.

## Magic Quadrant

Figure 1. Magic Quadrant for Contact Center Infrastructure



Source: Gartner (June 2013)

## Vendor Strengths and Cautions

### Aastra

Aastra's flagship platform is Solidus eCare, a multichannel contact center platform that is tightly integrated with the MX-ONE IP telephony platform, but which also integrates with the rest of Aastra's IP PBX portfolio and operates as a stand-alone suite for multivendor environments. Cloud-based versions of Solidus eCare are available through select Aastra partners. Aastra also offers its Centergy Virtual Contact Center (CVCC) hosted contact center service, primarily in North America.

Solidus eCare is best-suited to organizations with midsize contact center environments. Organizations committed to Aastra — especially for the MX-ONE platform and the broader set of BluStar capabilities — should consider Solidus eCare.

### Strengths

- Aastra has a strong installed base globally of both MX-ONE and Solidus eCare, as well as an extensive channel partner network to resell its communications portfolio. Despite continuing to market additional call center offerings as tactical solutions in various geographic markets, the company has focused its sales, marketing and development efforts on Solidus eCare as its flagship contact center offering going forward.
- Aastra is a focused enterprise business, with a management team that is seeking growth through the acquisition of competitive businesses.
- Virtualization of both the telephony and contact center application platforms enables Aastra to offer a software-oriented contact center proposition at very competitive rates.

### Cautions

- Investment in R&D by Aastra lags that of many of its competitors, which means it is challenged to stay at the forefront of contact center developments. For example, it lacks functionality in advanced WFO capabilities.
- A significant amount of Aastra's business is generated in the Western Europe region. This region has experienced a dramatic decline in sales resulting from a number of factors, including the European Union sovereign debt crisis (end-user revenue was down 16% in 2012 compared with the prior year — see "Forecast: Contact Centers, Worldwide, 2010-2017, 2Q13 Update"), and conditions are not forecast to improve significantly in the near term. The market conditions in Western Europe could negatively impact Aastra's near-term ability to fund and grow its contact center business.
- Although the company has centralized development and marketing for its Solidus eCare portfolio, the Aastra businesses it serves are federated on a country or regional level, in some cases with a different product portfolio, making it difficult for large organizations to standardize on contact center solutions if they are not starting from a Solidus eCare base.

### Alcatel-Lucent

Alcatel-Lucent Enterprise has three core platforms for providing contact center solutions to its customers. The first, OmniTouch Contact Center (OTCC), is a voice-centric platform integrated into

**Business Model:** The soundness and logic of the vendor's underlying business proposition.

**Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

**Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or preemptive purposes.

**Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

two environments: the smaller OmniPCX Office communications platform, and the OTCC Standard Edition for the OpenTouch Business Edition and OmniPCX Enterprise platforms. The second platform is the Genesys Compact Edition (GCE), a solution based on Visual CC, an Alcatel-Lucent Enterprise patented technology, together with Genesys routing technology targeting midsize contact centers (up to 150 agents). The third solution is OpenTouch Customer Service (OTCS), a multichannel contact center platform, which is delivered in partnership with Altitude Software but tightly integrated with its own Unified Desktop client and administration platform and which benefits from the collaboration and mobility capabilities of the OpenTouch platform. While the company's relationship with Genesys continues as a reseller (Alcatel acquired purchased Genesys in 2000 and sold it in 2012), the intent of OTCS is primarily to provide a less complex, more tightly integrated multichannel solution in partnership with Altitude's uCI platform. Alcatel-Lucent also offers OTCC and OTCS as cloud-based contact center solutions as part of its OpenTouch Enterprise Cloud portfolio.

Organizations that want to source a broad set of communications capabilities from a single vendor should consider Alcatel-Lucent's contact center portfolio, especially if they are committed to the OpenTouch strategy.

### Strengths

- Alcatel-Lucent has a large voice customer base, especially in Europe, into which to upsell multichannel contact center capabilities. If the company can achieve strong penetration of this installed base, it should enhance the stability of the company's enterprise business unit and increase the likelihood that the contact center business will continue to receive concentrated funding for R&D, as well as sales and marketing.
- The return of the Altitude partnership, which predates Alcatel's acquisition of Genesys in 2000, is beneficial to customers of both Alcatel-Lucent and Altitude.
- The company has strong capabilities in supporting complex, professional-services-intensive deployments, based largely on its experience in delivering Genesys-based solutions.

### Cautions

- Relying on partners for high-value communications components (such as contact center components) weakens the overall value proposition and can be disruptive to customer relationships if the partner is acquired by a competitor.
- While the partnership between Alcatel-Lucent and Altitude can be beneficial to both vendors in terms of growing share, Altitude's traditional market strength is in business process outsourcing (BPO), while the needs of Alcatel-Lucent's customers are much broader.
- Alcatel-Lucent has limited contact center presence in North America, which can limit its ability to support companies requiring global coverage.
- Some concern continues to exist over the future of the company's enterprise business, as it now resides within "Focus Businesses." Organizations should expect clear statements from new leadership regarding intentions for Alcatel-Lucent Enterprise.

[▲ Return to Top](#)

## Altitude Software

Altitude uCI is an IP-based multimedia contact center suite that operates either as an adjunct CTI server to leading enterprise telephony platforms, or independently with Altitude vBox, an Asterisk-based IP PBX platform. Altitude has extended its direct market presence with new offices in Germany and Sweden (from its 2012 acquisition of a majority interest in ASP Nordic, a cloud provider of contact center services). Altitude complements its enterprise Altitude uCI offering with Altitude Cloud, and Altitude uCI is also the core engine behind Alcatel-Lucent's OTCS solution.

Organizations that wish to build an independent multichannel contact center infrastructure can consider Altitude uCI as a contender.

### Strengths

- Altitude continues to retain its strength in the outsourcing market from both a product and pricing perspective, but it is leveraging this for new market opportunities. Recent success in the financial services sector is positive for growth.
- Altitude Cloud provides an opportunity to further grow the sustainable utility license model, and it positions Altitude to take advantage of revenue opportunities associated with the growing interest in cloud provisioning.
- The partnership with Alcatel-Lucent is positive in that it opens broader market opportunities through more channel partners and access to Alcatel-Lucent's sizable installed base of enterprise telephony users — delivering a new revenue stream for Altitude.

### Cautions

- Altitude's focus on the outsourcing market may pose a challenge with regard to its expansion to the broader enterprise contact center market, particularly when it comes to developing vertical-specific needs.
- Although Altitude has reseller relationships with some Tier 1 integrators, these companies also have generally stronger relationships with Altitude's competitors. Consequently, Altitude has to spend more effort in sales and marketing than channel relationships would normally demand. This is difficult for smaller companies such as Altitude with fewer sales resources.
- Despite increased investment in boosting awareness, Altitude lacks the brand awareness of its major competitors, which may limit its expansion success.

[▲ Return to Top](#)

## Aspect

Aspect's Unified IP offers a unified multimedia contact center application suite for midsize to large implementations, including several best-of-breed applications.

Consider Aspect when there is a need to integrate with multiple PBX/IP telephony environments, or when seeking to decouple the timing of your contact center and telephony investment decisions.

### Strengths

- The unified architecture of Aspect's Unified IP products provides common application development, management and reporting tools. They incorporate the company's best-of-breed technology, including call and multimedia routing, an IVR/voice portal, outbound dialing, agent WFO, and unified communications. Users can manage multiple sites or workgroups through a unified command-and-control interface, which can also be extended to support the company's "signature" (legacy) contact center platforms.
- The company's Aspect Applications Foundation, released in the second half of 2012, provides a promising set of packaged integration tools for developing integrations to Microsoft Lync, SharePoint and Dynamics unified communications and collaboration (UCC) and CRM tools.
- Aspect's considerable experience in contact center products and markets can be helpful to companies with complex requirements. Aspect also has good global reach for sales and support.
- Under the direction of a new executive management team, Aspect is showing early signs of reinvigorating its product development, sales and marketing efforts.

### Cautions

- Aspect traditionally charges premium pricing for ongoing maintenance services, but its service team has received mixed reviews from Gartner clients for several years in succession. Aspect customers and prospects must evaluate the impact of this pricing on the solution's total cost of ownership (TCO) and check references to validate that the service team's skill level is commensurate with the service pricing.
- The company lacks an enterprise PBX/IP PBX installed base of its own into which to sell its products. As such, and in the light of the lack of "greenfield" opportunities for large contact centers in North America and Western Europe, Aspect must attempt to sell into the PBX installed bases of other vendors, which can be a challenging task. The company is attempting to overcome this challenge by enhancing its ability to integrate with corporate investments in Microsoft solutions, but this strategy is still in the early phases of execution and remains unproved.
- Despite showing recent gains in growing its business, Aspect has faced several successive years of declining sales. While the company's financial performance is solid — based largely on recurring maintenance revenue from its installed base — the lack of growth in its installed base may affect Aspect's revenue streams in the long term.

▲ [Return to Top](#)

## Avaya

The Avaya Aura Call Center Elite offering supports midsize-to-large telephony-oriented call centers, and it can be expanded using the Call Center Elite Multichannel Feature Pack for existing Call Center Elite users who require core multichannel capabilities, including Web, email, chat, SMS and CTI functionality. For organizations with more advanced CRM and multichannel needs, the company offers Avaya Interaction Center and Avaya Aura Contact Center. Each of these offers is packaged to target specific customer segments, with products and services priced and marketed to midsize enterprise contact center environments. Avaya offers managed services and cloud-based solutions either hosted by Avaya or through select channel partners.

Consider Avaya's call and contact center offerings when looking for solutions that include several best-of-breed applications for contact center environments with customer service requirements ranging from simple to complex.

### Strengths

- In 2012, Avaya introduced Call Center Elite Multichannel as a native multimedia enhancement to its Call Center Elite offer, including the ability to leverage Call Center Elite's existing Call Management System reporting environment. This solution presents a significant portion of the company's large installed base of Call Center Elite customers with a more palatable path to add nonvoice capabilities than the existing options of adding Avaya Interaction Center or migrating to the Avaya Aura Contact Center offering — both of which require significant technology and operational changes.
- Avaya's contact center portfolio of solutions includes a broad set of applications for call routing, multichannel, self-service, workforce management and analytics. Avaya Aura Orchestration Designer provides a single application development environment spanning voice and multichannel self-service and assisted-service agent workflows. Avaya's Workforce Optimization Suite offers a broad set of Avaya and third-party-developed WFO capabilities, including strong analytic capabilities when combined with the Avaya Performance Management reporting and analytic tools.
- Avaya Contact Center Control Manager offers a very strong set of system management and partitioning capabilities. It enables enterprises to support multiple contact center applications from a single environment, while enabling user groups to control their own routing rules and customer data. In addition, it allows operational groups to provide backup assistance to one another for disaster recovery purposes, or to support activity spikes.
- Avaya has strong global coverage and holds the top market share position in contact center

routing in terms of end-user revenue and agent shipments globally, with more than a 35% market share in both categories. This provides the stability associated with strong product and service revenue and a large installed base into which additional products and services can be sold.

### Cautions

- Gartner continues to hear some concerns among Avaya customers regarding the technical and project management skill level of Avaya's professional services and ongoing support service organization. Avaya continues to make investments to address this situation, but this effort should be considered a "work in progress," and customers and prospects should seek to ensure that Avaya staff members assigned to their project have sufficient experience supporting similar environments. Further, they should seek clarification regarding the escalation path for ongoing support if resource issues arise.
- Avaya holds a strong lead in global contact center market share; however, the company has seen that share erode in recent years as its share has slipped in some other areas of its business. Customers continue to express concern regarding the company's long-term financial stability. Avaya must reverse its recent track record of declining revenue and operating losses to prevent concerns regarding its financial stability proving to be a self-fulfilling prophecy. Avaya has refinanced some of its previous near-term debt — extending the servicing window by several years — which may assuage some of the concerns that Gartner has heard.
- By continuing to support and enhance the Avaya Aura Call Center Elite and Contact Center product offerings — including the Call Center Elite Multichannel and Interaction Center multichannel enhancements — Avaya is perpetuating a more costly multiplatform development environment, which requires it to develop and support a wide variety of integration offerings to support customers' technology adoption plans from a variety of starting points.

[▲ Return to Top](#)

## Cisco

Cisco's contact center offerings include: Unified Contact Center Enterprise (UCCE), targeting large enterprises and those requiring advanced functionality; Packaged Contact Center Enterprise (PCCE), targeting contact centers that have fewer than 1,000 agents and want a smaller IT footprint than the full UCCE solution; and Unified Contact Center Express (UCCX), targeting small to midsize centers with fewer than 400 agents, or fewer than 100 agents when sold as part of Cisco's Business Edition 6000 communications platform. A fourth offering, Cisco Unified Intelligent Contact Management (Unified ICM) Enterprise, provides network-level routing and can support multivendor environments. Cloud-based Cisco solutions are also available through select channel partners on the company's Hosted Collaboration Solution (HCS) platform.

Consider Cisco's contact center offerings if your company is committed to Cisco's Unified Communications Manager or prefers an end-to-end Cisco infrastructure.

### Strengths

- Cisco's Unified Contact Center portfolio supports a broad set of functionality, including call and third-party-developed multimedia routing, network-level routing, IVR/voice portal functions, and outbound dialing.
- Cisco's PCCE has seen strong early acceptance by companies that do not require the scale or complexity of full UCCE solutions. PCCE was introduced in late 2011 and continues to be enhanced with simplified system design, implementation and management features. It offers call control, call routing, IVR and reporting on a single server, with optional functionality, such as multimedia routing and call recording on additional servers.
- Cisco has strong corporate brand recognition and respect among IT decision makers and influencers. The company offers broad global reach and highly scalable solutions, enabling it to address the needs of large and geographically dispersed companies.
- Several of Cisco's key channel partners have strong contact center consulting and system integration skills to deliver highly customized and complex contact center solutions. Customers that choose one of Cisco's stronger channel partners can find that Cisco solutions can support highly complex contact center environments.

### Cautions

- Cisco does not offer an all-in-one contact center application suite capable of scaling to large-enterprise sizes. Cisco's Unified Contact Center Express product supports a tightly bundled application suite but scales up to only 400 agents.
- Cisco offers Web-centric communications channels (such as email, Web chat and co-browsing) and support for WFO capabilities through an OEM agreement and through partnerships, respectively. This strategy can add support complexity, and it risks disruption to customer relationships if the partner is acquired by a competitor.
- Cisco Unified ICM can support integration to third-party telephony environments but is frequently too expensive and underfeatured for most enterprise contact center environments. In new deployments, the offering is typically used as a steppingstone to convert the customer to the company's UCCE or UCCX premises-based contact center products.

[▲ Return to Top](#)

## Enghouse Interactive

Enghouse Interactive has three distinct contact center offerings. Contact Center: Enterprise (formerly Syntellect Customer Interaction Management) targets midsize to large, premises-based

contact center environments and virtualized cloud environments. Contact Center: Service Provider (formerly CosmoCom CosmoCall Universe), targets service provider environments and very large enterprises (which use the product to offer contact center services to end users via the cloud). The third offering, Zeacom, targets small to midsize contact centers.

Consider Contact Center: Enterprise when looking for a premises-based or virtualized multimedia contact center routing solution that can leverage a variety of IP PBX infrastructure environments.

Consider Contact Center: Service Provider when looking for a multitenant enterprise offering for "private cloud" environments, or when seeking a platform from which to offer cloud-based solutions as a communications service provider (CSP). Consider Zeacom when seeking a multichannel contact center solution for fewer than 100 agents.

### Strengths

- Contact Center: Enterprise is a tightly integrated multimedia contact center application suite that uses CTI to existing PBX investments to leverage existing telephony investments. This offering has its strongest regional presence in North America, with increasing growth in Western Europe.
- Contact Center: Service Provider comprises a broad suite of highly scalable and fully featured contact center infrastructure applications, including call and multimedia routing, contact recording, and outbound dialing. This offering, which is commonly sold into service provider environments, has its strongest regional presence in EMEA — particularly among telephone companies (telcos) and cable operators. It also has a growing presence in North America and the Asia/Pacific region.
- Zeacom targets contact centers with fewer than 100 agents and supports IVR, workflow routing and a breadth of communications channels. The solution integrates with telephony systems from Microsoft, Avaya, Cisco and NEC. Zeacom has its strongest presence in North America and the Asia/Pacific region and a growing presence in Western Europe.
- Over time, Enghouse Interactive is expected to increasingly share technologies across its three otherwise separate technology sets. An early example of this shared-technology approach can be found in the company's newly released Web-based agent interface, which is intended to provide a consistent agent experience across its enterprise and cloud product lines.

### Cautions

- Enghouse Interactive is a new brand and lacks significant brand recognition. Although the company wishes to use each of its formerly separate business units to sell its other offerings into geographies where it previously lacked strength, there is no guarantee that this approach will be successful — and in pursuing these multiple efforts, the company risks losing focus on doing any of them well.
- The company offers multiple, separate contact center infrastructure offerings that serve distinct markets, and it must now work through the process of creating synergies in product development, sales, customer support and marketing. Such efforts dilute R&D as well as sales and marketing focus in the near term and run the risk of near-term missteps in many areas.
- Enghouse Interactive's lack of a consistent product offering set and presence across all geographies makes it difficult for the company to meet the needs of large, global enterprises. Customers and prospects should verify that Enghouse Interactive can provide staff with installation and support capabilities who are skilled in the specific products being considered in each relevant market.

[▲ Return to Top](#)

## Genesys

Genesys' Customer Interaction Management (CIM) platform and related offerings provide a breadth of highly customizable and scalable contact center functionality. Over the last 12 months, Genesys has released or announced several new offerings intended to expand its market reach into small and midsize contact centers, and to simplify its offerings to address environments that do not require the customization afforded by its flagship CIM platform. These offerings include: Genesys One, a packaging of the CIM offering intended to reduce TCO and complexity by providing an all-in-one solution combined with best practices and rapid deployment capabilities; Genesys Cloud, providing a hosted contact center solution targeting a wide range of sizes and complexity levels and leveraging the CIM code base; and Genesys Connect for Service Cloud, a CCaaS solution providing multichannel capability natively built on the salesforce.com platform. Cloud-based services built on Genesys infrastructure are also available through select Genesys partners.

Consider Genesys solutions when looking to support large, complex contact centers, including those that require significant customization to address differentiated customer service needs. Because it is telephony-vendor-neutral, Genesys CIM should also be considered when there is a requirement to integrate with multiple PBX/IP telephony environments, or when separating contact center and PBX and IP telephony purchasing decisions. Genesys Express supports midsize contact centers that need multimedia functionality with integration capabilities across a variety of vendors' telephony environments.

### Strengths

- The Genesys CIM platform and other components of its contact center portfolio support a broad suite of highly scalable and full-featured contact center infrastructure applications. These include call and multimedia routing, network-level routing, voice response, contact recording and outbound dialing, and workforce management and analytics. Customers continue to report that CIM version 8 software provides strong integration across the application suite.
- The company has a strong vision for decoupling contact center applications from telephony

infrastructure; for extending contact center capabilities into unified communications environments and enterprise workflow beyond the contact center; and for integrating social-media-based communications into structured contact center activities.

- Genesys can provide strong consulting and system integration services either directly or through its professional services partners. Genesys also has a good capability to support global customers.
- Following the sale of the company by Alcatel-Lucent to a group of private-equity firms, Genesys has emerged from the threat of losing its competitive advantage as a PBX-independent solution provider. Under its current ownership and with a mandate to grow the business, Genesys has shown strong growth in sales of its newer solutions, including WFO, SIP Server and Performance Management (analytics), and recent acquisitions in the cloud contact center and speech recognition spaces, among others, indicate the new ownership group is rewarding the company's performance with additional investment.

### Cautions

- Following its breakout from former parent company Alcatel-Lucent, Genesys is now owned by a combination of private-equity investors whose holding portfolios are based largely on high-growth companies. In its first year of operations as a stand-alone company, Genesys has met the growth expectations of its new owners; however, if Genesys cannot deliver the growth rates that its new investors target, their commitment to invest in the company and its product development and sales over the long term may wane. Genesys solutions typically target large and complex contact center environments, but the company is facing increased competition in this target market, and it is unclear whether demand from this market will continue at previously seen rates.
- Genesys' CIM solutions are often more costly and customized to a user's particular environment than those of competitors. These solutions are often not as cost-effective, while being too complex to deploy and manage for small and midsize contact center deployments.
- Genesys has made several past attempts to go "down market" in terms of solution size and complexity with very limited success. The difficulty is caused by several issues, including product prices and complexity and a lack of sales focus on the midmarket. Whether the company's most recent efforts will be any more successful remains to be seen.

▲ [Return to Top](#)

## Huawei

Huawei's eSpace Unified Communications (UC) multimedia contact center infrastructure portfolio centers on its UAP6600 platform for large-enterprise and telco environments, U2990 for enterprises, and U2980 (which can be packaged as part of Huawei's OneBox contact center appliance offer) for small and midsize contact centers. The portfolio now supports wide interoperability with complementary major Western and Asian partners in CTI, call logging, workforce management, text to speech, automated speech recognition, CRM, gateways and session border controllers, virtual teller machines, and agents' desktop devices.

Enterprises, telcos and government agencies in the Asia/Pacific region (especially China) and emerging economies should consider Huawei when looking for low-cost solutions — especially when part of a larger Huawei data infrastructure sale or environment.

### Strengths

- Huawei has a very complete suite of enterprise contact center solutions for customers ranging from small or midsize businesses (SMBs) with OneBox 50/100 to some of the world's largest contact center installations. Its Asian and Western third-party partner ecosystem provides complementary contact center solutions for specific industry verticals and system integration projects — particularly in government organizations and large enterprises, such as telecommunications, finance, electricity, transport and energy companies. Huawei's road map calls for aggressive development of large-scale multimedia converged solutions and virtual contact center clouds for BPO and multitenant operations.
- Huawei has made substantial investments in appointing master distributors worldwide, particularly in Africa; Brazil, Russia, India and China (the BRIC countries); and emerging economies in Asia, Eastern Europe and Latin America — where it typically has well-developed relationships stemming from prior sales of telecom fixed and mobile network infrastructure.
- Contact center solutions are being sold through newly appointed distribution channel partners and CSPs worldwide. Huawei's contact center labs, development centers of excellence, R&D and distribution centers, and logistics have now been in place for a few years. While most of Huawei's sales have previously been within its home market in China, the majority of its networking business now comes from outside greater China.
- Huawei may eventually become a Tier 1 global enterprise contact center provider by maintaining its historic CSP relationships — and by installing large-scale multitenant cloud CCaaS solutions sold through CSPs, in tandem with on-premises solutions sold through its emerging enterprise business channels.

### Cautions

- Huawei's contact center solution portfolio can be sourced as an "all-in-one box," but its solutions are not as tightly integrated as many competitors' all-in-one suites — even though they may be preconfigured solutions for particular industry verticals and popular commercial applications. Its enterprise products are relatively stand-alone and best-suited to integration into a best-of-breed or do-it-yourself environment. For most of Huawei's contact center deployments outside China, the recently acquired support skills of Huawei's channel partners will be an early determinant of Huawei's ability to deploy contact centers for enterprises.

- Huawei's investment and rapid channel expansion agenda in its global enterprise distribution channels will take several years to achieve critical mass for contact center sales. Markets in emerging countries may have stronger economic growth than recessionary Europe or North America, but they have their own commercial complexities for multinational corporations planning contact center deployments.
- Recognition of Huawei's eSpace contact center brand and capabilities is likely to come initially through the very large-scale projects where its most capable global-scale system integrators are active. Midmarket success can come only from persistent effort in mobilizing its sales channels, certified engineer training and the recruitment of effective network integrator partners. Enterprise buyers need to evaluate Huawei's and its channel partners' readiness to serve their business in each country of operation.

[▲ Return to Top](#)

## Interactive Intelligence

Interactive Intelligence's Customer Interaction Center (CIC) offering provides an all-in-one suite of contact center applications across a wide range of scalability requirements. The company also offers its Communications-as-a-Service (CaaS) cloud-based option.

Consider CIC when looking for a tightly integrated set of contact center applications or when wanting to decouple the timing of your contact center and telephony investment decisions.

### Strengths

- The CIC suite uses Web services and provides a common set of application development, management and reporting tools across a range of its applications. Its efficient use of server resources and consistent administrative and management tools across applications make the system particularly appealing to IT decision makers.
- Interactive Intelligence continues to compete successfully for midsize and large contact center deals and to grow its installed base at a pace well above the market average. The company also continues to improve its brand recognition in North America, and it is making steady progress to increase its sales and marketing footprint globally.
- The company has acquired several of its key channel partners globally to help establish a direct, in-region sales presence and to assist other channel partners where specific skill sets may be lacking.
- Interactive Intelligence is finding success in selling its CaaS offering in hosted and hybrid (on-premises and hosted) deployments in enterprises of various sizes. The company is finding strong adoption of its hosted offerings in the U.S., although significant growth is being seen in other regions, with data center locations in Europe, Australia, Japan and Latin America.

### Cautions

- Despite making investments in its sales channel program to support enterprises outside North America, the company does not match the global coverage provided by some of its larger competitors. Companies should evaluate the ability of Interactive Intelligence and its channel partners to meet their needs in relevant geographies.
- Some of Interactive Intelligence's contact center applications are less feature-rich than competitive best-of-breed offerings.
- Not all Interactive Intelligence's channel partners are strong in designing, installing and supporting contact center environments. Prospects should check channel partner references for environments that match their scalability and complexity needs.

[▲ Return to Top](#)

## Mitel

Mitel's Contact Center Solutions (CCS) Enterprise Edition supports a broad suite of contact center infrastructure applications, including call and multimedia routing, voice response, outbound dialing, call recording, and workforce management. The Business Edition of its product offers a subset of the features available in the CCS Enterprise Edition, targeting contact centers with 25 or fewer agents. CCS Enterprise Edition is also available as a hosted service from Mitel.

Consider Mitel when looking for contact center solutions associated with Mitel Communications Director telephony and unified communications environments.

### Strengths

- Once focused almost exclusively on the "fewer than 100 agents" market, Mitel has increased the scalability and resiliency of CCS Enterprise Edition to better address midsize- and large-enterprise markets. It has also charged its channel partners with pursuing SMB accounts, while Mitel's own direct sales organization focuses on large-enterprise and multinational accounts. Mitel is now a legitimate provider of solutions for environments with hundreds of agents, and the company reports that it has several customers supporting more than 1,000 concurrent agents.
- Mitel has a strong network of channel partners, particularly for SMBs in North America, with adequate coverage in Western Europe and the Asia/Pacific region. The company's recently increased contact center training and certification requirements and its direct support for its channel partners are leading to improvements in the overall skill level of its sales channels.
- Mitel offers strong integration with Microsoft communications products and can deliver combined solutions to midsize contact center environments through channel partners certified to deliver both product sets.

### Cautions

- Mitel has limited ability to support very large contact center environments (such as those requiring more than 1,000 agents per system) and customers with multinational requirements. The company has limited market presence and awareness globally, and it lacks the financial resources to rapidly increase awareness of its brand.
- The company's CCS solutions lack the breadth of functionality available from a number of other vendors, including capabilities such as a complete WFO suite, predictive dialing and workflow/task routing.
- Mitel's contact center sales are primarily limited to Mitel telephony environments.

▲ [Return to Top](#)

## NEC

NEC's flagship multimedia contact center offering, Univerge 3C, supports customers ranging from SMBs to companies with thousands of call center agents. NEC offers cloud-based contact center solutions as an add-on offering as part of its unified communications as a service (UCaaS) solution set. Currently, only a small percentage of NEC's contact center sales are based on its flagship Univerge 3C software. The majority of its deployments are based on system integration projects in large-enterprise environments, with the remainder of deployments on appliance-based solutions.

Consider NEC's Univerge 3C solution when your enterprise has a significant commitment to NEC telephony (regardless of whether you have, or plan to have, an NEC unified communications deployment). The scale and functionality of your contact center needs should be clearly known and deployed within the countries where NEC operates to avoid the integration limitations of NEC's country-specific product offerings.

### Strengths

- NEC's Univerge 3C UCC architecture provides further consolidation of the company's contact center offering for midsize and large contact center environments, which had been served by disparate offerings in the past.
- NEC has a large installed base of PBXs and contact centers that is amenable to upgrading with additional seats, contact center products and related services. It has particular strengths in the hospitality, government and health verticals and recent sales increases.
- NEC has built on its previous investments in both appliance-based IP telephony and software-based UCC solutions in its Univerge 3C contact center solutions, reflecting the most popular approaches in the Asia/Pacific and North America markets that it addresses.

### Cautions

- NEC's adoption of multimedia customer service functions within its contact center solutions — and its integration of popular tools, such as Microsoft Lync and customer-facing instant messaging and Web chat — has lagged behind that of its competitors (even though NEC's main role in contact centers remains that of a system integrator).
- Its contact center portfolio sales are primarily to enterprises with significant existing NEC telephony environments. Gartner sees limited results from NEC's attempts to broaden the appeal of its contact center solutions in order to displace other vendors.
- NEC operates mainly in Asia/Pacific and North American markets. Its multiple contact routing products for different countries limit its ability to support multinational companies with a consistent contact center product set worldwide. Multinational corporations requiring uniform contact centers that can be installed and operated worldwide will need to evaluate NEC's Univerge 3C contact center solution, which has been developed as a consistent solution for global companies.

▲ [Return to Top](#)

## SAP

SAP's Business Communications Management (BCM) is an IP-based, multimedia contact center suite that natively integrates with a range of SAP's business applications (including SAP CRM, SAP ERP, SAP Business ByDesign and SAP NetWeaver). This enables SAP's regional offices to sell BCM as a component of a business process solution. BCM is also available as a stand-alone suite capability and is sold by partners into the customer service and contact center market. BCM is designed to work equally well in an on-demand software-as-a-service model and as an internally hosted contact center solution.

SAP BCM is a candidate for consideration for any organization using the SAP business application suite. It is also a consideration for organizations looking for a stand-alone platform independent of existing enterprise communications platforms.

### Strengths

- As a part of the SAP group, the contact center software division benefits from the global reach and financial security of a leading business application software supplier.
- SAP's BCM platform is a scalable contact center suite with built-in multitenant capabilities based on virtual units, which position it well as either an external cloud solution or as an internal, private cloud capability.
- Integration with SAP's business application suite enables BCM to be sold as an add-on to a CRM solution.

### Cautions

- Organizations that have not deployed SAP for business processes may not consider BCM to be a viable alternative because it is perceived as being specifically integrated with the SAP

application suite.

- Because BCM is a software-only solution, organizations will need to ensure support is maintained for third-party peripherals, such as gateways, session border controllers and, where deployed, handsets. It will be important to find a partner that is prepared to provide a service for all components of the contact center solution.
- Product development on the BCM platform lags that of some of the leading vendors in this space. BCM 7 was released in June 2011, and much of the development of the product since then has been focused on more tightly integrating with other SAP applications to the detriment of expanding BCM's core functionality.

▲ [Return to Top](#)

## Siemens Enterprise Communications

Siemens Enterprise Communications (Siemens) has two contact center platforms to meet the needs of enterprises. OpenScape Contact Center (OSCC) is a common software platform and is deployed across three product offerings. These offerings include: OSCC Agile (which supports up to 100 active seats); OSCC Enterprise (which supports up to 1,500 seats, and up to 7,500 in a multisystem deployment); and OpenScape Enterprise Hosted UC (for deployment in a data center hosted environment). The single software platform makes it possible for contact center operations to smoothly upgrade for greater scale. The second contact center platform is OpenScape Cloud Contact Center, based on a strategic partnership with inContact and leveraging inContact's technology and services to provide a scalable, multichannel contact center capability delivered in a CCaaS model.

Consider OSCC offerings when looking for full-featured contact center applications running in existing or potential Siemens telephony and unified communications environments, including those requiring multisite and multinational deployments. Consider OpenScape Cloud Contact Center when seeking a CCaaS offering.

### Strengths

- OSCC is a well-integrated multimedia contact center application suite, and Siemens continues to fill out functionality within the suite. The company has a good vision for extending its OSCC capabilities into unified communications environments.
- Siemens continues to build momentum in the contact center space, with an improved focus on product development, sales and marketing efforts aligned with the core business and branding.
- The scalability achieved in OSCC Enterprise means Siemens can focus more on selling its own products into the high end, with less reliance on Genesys than in the past.

### Cautions

- Siemens lacks the brand awareness of key competitors, which will limit its ability to grow the OSCC installed base.
- The company's OpenScape Cloud Contact Center solution is based on technology from inContact and therefore lacks the seamless migration possible with the OSCC portfolio. Customers can switch between the different offerings; however, this change is not seamless.
- Siemens Enterprise Communications operates as a joint partnership between its former parent company Siemens AG and the private equity firm The Gores Group. Siemens AG's stated intent to exit the communications business raises questions over the future ownership of Siemens Enterprise Communications. While Siemens Enterprise Communications' executive strategy is clear, risk-averse organizations should seek clarity on the owners' future plans.

▲ [Return to Top](#)

## Vocalcom

Vocalcom has evolved its Hermes.Net contact center platform to support cloud environments along with its more traditional offering, which is available as a stand-alone suite or an adjunct server of leading IP PBX platforms (notably, Avaya Aura Communication Manager). Hermes Cloud is a call center capability available from within Salesforce AppExchange for Sales Cloud and Service Cloud. Hermes EC3 is hosted virtual call center software available through Amazon Web Services. Vocalcom retains its market strength in the French and Spanish markets but is now executing on expansion plans into the U.S., the U.K. and Germany.

Organizations that wish to build a contact center infrastructure independent of enterprise communications infrastructure, or that are seeking that capability as a cloud-based proposition, can consider Vocalcom Hermes.Net as a contender.

### Strengths

- Hermes.Net is a comprehensive inbound and outbound multimedia platform. It is thin-client-native and software-oriented and is offered either through a right-to-use license or via subscription licensing with salesforce.com or Amazon.
- Hermes.Net offers a broad range of scalability options, supporting large service providers with thousands of agents, as well as SMBs with 20 or fewer agents.
- Vocalcom is an established business with a core competence in providing solutions for the outbound/telemarketing vertical, especially in the French and Spanish markets and their respective offshore locations in North Africa and South America.

### Cautions

- Vocalcom has experienced leadership turnover in the last year that may disrupt the ability to execute on product developments.
- Vocalcom has limited brand awareness outside its core markets in Southern Europe, South America and Africa, and it lacks investment to boost this awareness in pursuing new market opportunities.
- Vocalcom's focus on satisfying its customers in the outsourcing market distracts the company from more aggressively targeting enterprise contact center environments.

[▲ Return to Top](#)

## ZTE

ZTE's Next Generation Contact Center (NGCC) suite supports highly scalable multimedia contact center capabilities. Its AnyService@ZXNGCC multimedia unified contact center product is based on its new ZXMSQ10 SoftACD switch and system or its ZXNGCC all-IP-based contact center switching solution.

Consider ZTE's NGCC suite for deployments in China and in emerging economies, particularly when the requirement is for price-competitive solutions that scale to thousands of agents — for example, in CSP and contact center BPO environments. Contact center planners will need to evaluate how ZTE's contact center solutions apply to them in each country of their operations.

### Strengths

- ZTE's NGCC suite is designed for CSPs to provide multiple multitenant virtual centers for their enterprise customers, especially for call center service outsourcing. It can support 134,400 agents in a single module, with 8.6 million busy-hour call attempts.
- ZTE's recently established enterprise networking division has significantly changed its approach, from marketing and selling contact center solutions almost exclusively through CSPs to effectively leveraging other channel partners for sales and support. This will enhance the company's ability to sell and support complex contact center solutions for enterprises around the world.
- Beyond its present strength in the domestic Chinese market, ZTE is increasing sales of its next-generation contact center offering in emerging markets globally. The company's strength in the contact center market lies in selling NGCC as a platform for CSPs, channel partners and network integrators to offer multitenant hosted or cloud services for enterprises and outsourcers.

### Cautions

- ZTE currently has limited ability and experience in providing enterprise contact center solutions outside of China, neighboring Asian countries, and parts of the Middle East, Africa and Latin America, where it is established. This limits its appeal to global enterprise customers but makes it attractive to CSPs, government agencies and enterprises needing contact center services in geographies that are not well-served by Western vendors.
- ZTE's brand recognition is low among multinational organizations in the global contact center market. ZTE has a limited number of enterprise customer-premises deployments.
- ZTE provides enterprise contact center solutions through multitenant CSP partners, as well as through its newly established enterprise business unit channel partners. It can be difficult to find enterprise-focused channel partners or CSP partners with a strong understanding of the best practices used in contact center environments, particularly in emerging countries. The company's enterprise channel sales program lacks a track record of success.
- ZTE does not provide a tightly bundled contact center suite as a preconfigured offering, so buyers must evaluate ZTE's emerging channel partners' capabilities in integrating ZTE's virtual contact center deployment, CRM, CTI and multimedia Web services.

[▲ Return to Top](#)

## Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

[▲ Return to Top](#)

### Added

No vendors were added to the Magic Quadrant this year.

[▲ Return to Top](#)

### Dropped

No vendors were dropped from the Magic Quadrant this year.

[▲ Return to Top](#)

## Inclusion and Exclusion Criteria

To appear in this Magic Quadrant, vendors had to show all the following capabilities:

- Market share among the top performers in at least one geographic region (see "Market Share: Contact Centers, Worldwide, 2012") or, failing that, sufficient differentiation to obtain market presence.
- Sufficient sales and operational presence to support their market objectives.
- Demonstrable solutions in most contact center infrastructure portfolio areas defined earlier. At a minimum, offerings must include multimedia contact routing and prioritization, IVR or voice portal capability, and CRM integration tools.
- Evidence of an ability to generate significant interest from leading client segments.

[▲ Return to Top](#)

## Evaluation Criteria

### Ability to Execute

Gartner analysts evaluate contact center infrastructure technology providers based on the breadth, quality, and overall breadth and maturity of their applications, customer support capabilities, and ability to deliver solutions that enable contact center operations in formal contact centers in companies, outsourcers, and/or service providers. Ultimately, contact center infrastructure technology providers are judged on their ability and success in capitalizing on their vision.

**Table 1.** Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	High
Sales Execution/Pricing	Standard
Market Responsiveness and Track Record	Standard
Marketing Execution	Standard
Customer Experience	Standard
Operations	Standard

Source: Gartner (June 2013)

### Completeness of Vision

Gartner analysts evaluate contact center infrastructure technology providers based on their ability to convincingly articulate logical statements about current and future market directions, innovations, customer needs and competitive forces, and how well these map to Gartner's overall understanding of the marketplace. Ultimately, contact center infrastructure technology providers are rated on their understanding of how market forces can be exploited to create opportunities for providers and their clients.

**Table 2.** Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	Standard
Offering (Product) Strategy	High
Business Model	Standard
Vertical/Industry Strategy	Standard
Innovation	Standard
Geographic Strategy	Standard

Source: Gartner (June 2013)

## Quadrant Descriptions

### Leaders

Leaders are high-viability vendors with broad portfolios, significant market share, broad geographic coverage, a clear vision of how contact center needs will evolve and a proven track record of delivering contact center products. They are well-positioned with their current product portfolio and likely to continue delivering leading products. Leaders do not necessarily offer a best-of-breed solution for every customer requirement. However, overall, their products are strong and often have some exceptional capabilities. Additionally, these vendors provide solutions that present relatively low risk of deployment failure.

[▲ Return to Top](#)

## Challengers

Challengers are vendors with strong market capabilities and good solutions for specific markets. However, overall, their products lack the breadth and depth of those in the Leaders quadrant. Challengers do not always communicate a clear vision of how the contact center market is evolving, and they are often less innovative or advanced than the Leaders. Vendors in this quadrant often excel at selling contact center functionality to their installed base of PBXs or IP telephony.

[▲ Return to Top](#)

## Visionaries

Visionaries demonstrate a clear understanding of the contact center market and provide key innovations that point to the market's future. However, these vendors typically lack the ability to influence a large portion of the market, have not yet expanded their sales and support capabilities on a regional basis, or do not yet have the funding to execute with the same capabilities as the Leaders.

[▲ Return to Top](#)

## Niche Players

The vendors in this quadrant offer contact center products that focus on a segment of the market or a subset of its functionality. Customers aligned with the focus of a Niche Player may find its offerings to be a good "fit" for their needs.

[▲ Return to Top](#)

## Context

Following several years of significant acquisition activity, recent history has shown a reduction in the rate of consolidation among the major vendors in this market, with most recent acquisitions being geared toward the addition of point solutions intended to enhance the overall technology coverage of vendors' portfolios. Examples include Avaya's acquisitions of Aurix for speech recognition and Conversive for virtual agents and Web chat, and Genesys' acquisitions of Utopy for speech recognition and Angel.com for cloud-based IVR. At this point, following several years of a challenging global economy, several vendors — including Siemens Enterprise Communications and Alcatel-Lucent — face uncertainty regarding their corporate parent's or ownership's commitment to maintaining and growing their respective businesses.

Many vendors are finding continued growth in this market by employing a variety of strategies, including:

- Focusing on technology differentiated from competitors' offers for various enterprises' needs
- Offering solutions that target service providers
- Targeting innovation toward niche applications, such as dialer solutions
- Targeting emerging markets that may offer faster market growth rates and more greenfield opportunities than those in mature markets, such as North America, Western Europe and the developed portions of the Asia/Pacific region

Although some best-of-breed point solutions will remain relevant, customers are increasingly adopting broader contact center solutions as tightly integrated suites or more loosely integrated portfolios from "cornerstone" vendors. All vendors covered by this report offer significant functionality beyond basic phone call routing and prioritization. Furthermore, many enterprises are recognizing the potential synergies that their customer-facing contact center infrastructure and software solutions can have with their current or planned investments in internal-facing unified communications architectures. These enterprises must consider how these investment strategies can coexist and potentially share communications and collaboration components, such as enterprise telephony, presence and conferencing applications.

This research captures Gartner's view of the general state of the market and evaluates vendors' capabilities on a global basis. It is not intended as specific advice for any one user company's situation. Companies planning to acquire new or replacement contact center infrastructure should contact Gartner analysts to discuss how this generalized model applies in their specific country, as well as how it applies to their specific business environment and needs.

[▲ Return to Top](#)

## Market Overview

The dynamics shaping the global contact center infrastructure market vary by region. The market is largely mature in North America, Western Europe and portions of the Asia/Pacific region, where most sales involve expanding or replacing existing systems. The North American and Western European markets combined accounted for nearly 60% of agent shipments in 2012. However, contact center infrastructure is still an emerging technology in many global regions, especially those experiencing rapid industrialization and service industry growth, such as the BRIC countries. In many countries, this market is forecast to grow at double-digit rates, compounded annually, through 2017 (see "Forecast: Contact Centers, Worldwide, 2010-2017, 2Q13 Update"). Overall, contact center agent shipments declined 3.4% in 2012 relative to the prior year. Regional performance varied widely, ranging from low-double-digit percentage growth in shipments in some regions, including Eastern Europe, Japan, the Middle East and Africa, to low-double-digit declines in other regions, including Latin America and Western Europe.

The market has traditionally been dominated by the leading vendors in the enterprise telephony

market — a market that has also experienced some consolidation in recent years. However, market barriers are not so high as to prevent other vendors from entering. Avaya, Cisco and Genesys accounted for more than 60% of global agent shipments in 2012, despite Avaya and Cisco showing shipment declines year over year, and while Genesys was recently divested by Alcatel-Lucent. Huawei, NEC and Mitel are the next three largest global market share holders, respectively. These three account for a combined share of less than 15%, but all showed strong market share gains in 2012. Some smaller players continue to find defensible market niches through geographic or vertical market specialization, low price, or differentiating technologies (see "Market Share: Contact Centers, Worldwide, 2012" and "Market Share Analysis: Contact Centers, Worldwide, 2012").

Contact center infrastructure solutions have traditionally been hardware-centric, but most vendors' solutions are now shipped as software that the customer can run on properly configured commercial, off-the-shelf servers, although some still require proprietary components. The majority of shipped solutions are based on Internet standards, including TCP/IP and Session Initiation Protocol.

The market has been consolidating over time, and incumbent vendors are looking to expand their solution portfolios to incorporate additional capabilities that commonly play a role in contact center ecosystems. These capabilities include IVR, outbound dialers, contact center workforce management, recording, e-learning, Web chat, email response management, live and prerecorded video, desktop collaboration, analytics, workflow, and mobility. This creates challenges to vendors that grow through acquisition or that develop their offering sets as a collection of separate, point solution offerings, in that a portfolio approach (rather than a more tightly integrated suite approach) results in an environment in which customers must manage and administer component systems separately. We are seeing more vendors offer bundles intended to simplify the purchase, configuration and implementation of their offering sets for the benefit of their sales channels, customers and prospects.

In 2013, trends influencing the planning and deployment of enterprise contact center infrastructure include:

- **Increasing infrastructure consolidation and centralization projects among companies that operate multiple contact centers** — These companies want to leverage the location-independent nature of IP-based infrastructure to reduce duplication of infrastructure investments. In response to this trend, most vendor solutions now support VMware or Hyper-V for system virtualization.
- **Momentum for multimedia routing, including email response management, Web chat and customer collaboration solutions** — These solutions, traditionally purchased from best-of-breed or point solution providers, are now increasingly being evaluated within the portfolio of the traditional automated call distributor vendors.
- **Increasing awareness and adoption of cloud-based contact center infrastructure deployments** — Gartner has seen a steady increase in client interest in cloud-based deployments, ranging from CCaaS solutions to company-dedicated hosted solutions. Once primarily the realm of deployments of 75 agents or fewer, these solutions are increasingly gaining adoption in environments with up to several thousand agents. These solutions have also evolved from providing only basic call routing to supporting complex customer routing schemes, including those supporting multiple media and sophisticated customer segmentation. Most vendors covered in this Magic Quadrant provide CCaaS or hosted contact center functionality, either directly or through partners.
- **Contact center WFO functionality** — Once almost solely limited to point solution providers, WFO functionality is now included in many contact center infrastructure suites or portfolios. This functionality encompasses varying combinations of contact recording, agent evaluation, workforce management, coaching and e-learning tools, postcontact surveying, and agent performance speech analytics.
- **Increasing awareness of social media's potential impact on contact center operations** — Many companies are now considering the potential impact of social-media-based interaction on customer service activities, although actual adoption of social CRM solutions in contact centers remains primarily limited to companies that take a more aggressive approach to technology adoption.
- **Growing interest in adding tighter linkage between customer service operations and mobile applications** — Mobile applications can provide customers with easier access to self-service information by supporting a visual interface to option selections and data that previously was available only to those accessing the company using a more traditional computer interface. These solutions can also provide customers with additional information and options based on real-time information regarding contact center operations, such as expected wait times and callback options. Mobility can also be used for internal-facing applications, such as providing real-time and historical performance dashboards and access to staffing and monitoring capabilities, while the contact center manager or director is away from his or her desk.
- **Emerging interest in integration with Microsoft Lync** — Many companies have significant investment in Microsoft Lync user licenses and IT support knowledge, and they are looking for ways to leverage these investments beyond their enterprise UCC deployments and into their contact center deployments. Despite vendor hype, few companies are integrating enterprise rich-presence capabilities in their contact centers, which would allow agents to pull non-contact-center subject matter experts into contact center customer interactions. Instead, many companies are focusing on the expected eventual maturity of Lync as an enterprise voice/IP telephony platform, at which point these companies foresee the potential for Lync to be the voice and multichannel routing infrastructure to which their contact center applications would need to integrate.

Many companies fitting a mainstream or conservative technology adoption profile have begun to embrace the use of multimedia customer communications. While email routing and response management has traditionally been companies' "nonvoice" channel of choice to add to their

contact center, Gartner has noticed a recent increase in the rate of adoption for Web chat functionality in contact centers, particularly in mature regional markets such as North America and Western Europe, and in mature country markets such as Australia and China. Companies with more aggressive technology adoption profiles have begun to embrace rich presence to incorporate subject matter experts directly into customer service processes. Technologies such as video and desktop collaboration with customers remain niche functionalities in contact center infrastructure, with limited and specialized commercial deployment. Regardless of their companies' technology adoption profiles, contact center planners should review Gartner's "Hype Cycle for Contact Center Infrastructure, 2012" to help develop road maps for the incorporation of new technologies into their environments to address customer relationship strategies. In some cases, this may involve evaluating the ability of a system to provide a wide breadth of functionality, not all of which may be implemented at the time of the system's initial deployment.

[▲ Return to Top](#)

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