

Magic Quadrant for Meeting Solutions

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By Analysts [Mike Fasciani](#), [Tom Eagle](#), [Adam Preset](#)

Meeting solutions blend communications, collaboration and content sharing to enable informal and formal meetings anywhere. Along with its Critical Capabilities companion, this research will help application leaders for meeting solutions find the vendors best suited to their needs.

Strategic Planning Assumptions

By 2022, 40% of formal meetings will be facilitated by virtual concierges and advanced analytics.

By 2024, remote work and changing workforce demographics will impact enterprise meetings so that only 25% will take place in person, down from 60% today.

Market Definition/Description

Meeting solutions are collaboration tools that support interactions between participants for daily teamwork, presentations, training and webinars. Enterprise offerings in this market perform equally well for users in meeting spaces, at their desks or when mobile, with integrated voice, video, messaging and content sharing.

Organizations with complex needs typically use separate meeting solutions for informal collaboration (among users within the same team or project) and for more formal meeting scenarios (external presentations, learning/training scenarios and large-scale webinars). This often causes an organization to deploy solutions from more than one vendor.

Application leaders who are responsible for digital workplace applications deploy meeting solutions to:

- Enhance face-to-face meeting activities (e.g., with content collaboration)
- Reduce geographic barriers for organizational communication
- Increase employee engagement for remote workers and team cohesiveness by using video
- Save time and money by minimizing business travel
- Train remote participants in multiple locations

- Deliver corporate or departmental communication events, such as employee town hall meetings

Complete meeting solutions enable richness of information and interaction by combining messaging, content and screen sharing, video, and audio.

Note: Gartner is not evaluating the stand-alone audio-only conferencing market in this research.

Buying Patterns

Based on Gartner client inquiry and reference customers, enterprise buyers for meeting solutions come from both IT and lines of business (LOBs), whose needs differ:

- **IT buyers** weigh the audio/video requirements and content sharing capabilities for enterprise meeting solutions in assessing purchasing decisions for horizontal use cases as well as broader unified communications and collaboration (UCC) goals.
- **LOBs** desire support for specific use cases, such as training, HR interviews of candidates, sales acceleration and marketing webinars.

To optimize cost, meeting solution decisions are made in the context of an organization's overall collaboration approach, as well as investments in cloud office products that have similar capabilities. It is still often the case that buying decisions for meeting solutions are done independent of decisions regarding enterprise voice platforms, though vendors are increasingly attempting to bundle these two pillars of unified communications.

Many larger organizations choose a tiered approach rather than a single vendor to deliver best-in-class capabilities across a variety of meeting scenarios. Smaller businesses frequently rely on a single meeting service to meet their less-demanding business requirements, focusing primarily on ease of use and cost sensitivities.

Application leaders face a predominantly cloud-based market for meeting solutions, although a minority of buyers still seek hybrid, premises-based as well as managed and dedicated deployment options.

As part of this Magic Quadrant research process, Gartner asked the included vendors' reference customers to list the key desired business outcomes when purchasing their chosen meeting solution. Here are the five top desired outcomes they cited, in priority order:

1. Creating operational efficiencies
2. Cost management
3. Driving innovation
4. Improving business process agility

5. Enhancing decision making

Trends

Gartner has a strategic planning assumption that may assist application leaders focused on the digital workplace in formulating their position on meeting solutions:

By 2024, remote work and changing workforce demographics will impact enterprise meetings so that only 25% will take place in person, down from 60% today.

Gartner conducted a digital workplace consumer study (see Note 1) to understand digital workers – specifically, shifts and trends in their sentiments and expectations, their level of engagement, and their satisfaction with the applications that their organization provides. The study results show that, in general, workers prefer to have fewer face-to-face meetings than they do today. Also, workers feel they now have sufficient technology to meet from anywhere. Workers without dedicated desks in the office prefer to work remotely, and younger demographics do more video from their desks and laptops rather than from office meeting rooms.

Vendors are responding to this strategic planning assumption and other factors in the meeting solution market by delivering:

- New designs based on ease of use for simplification of host controls, quick joining to meetings, and integration to conference room systems.
- Blended asynchronous (messaging, content, scheduling, tasks, recordings) and synchronous (voice, audio, screen sharing) collaboration in persistent rooms or workspaces.
- Equal capabilities across diverse endpoint types, from group video system codecs to desktops, laptops (through browsers or clients), smartphones, tablets and so on.
- Transcription and language translation for delivering webinars, town hall meetings and quarterly business reviews.
- Artificial intelligence (AI)-influenced technologies that improve the videoconference room experience by automating the meeting join and content sharing processes.
- Optimization of delivery to enterprise networks – for example, by supporting security via VPN or broadcast via CDN.
- Visibility into the enterprise video estate, with integrated management and reporting software providing information on meeting solution performance and usage.
- Integration with related collaboration investments, including UCC and cloud office.
- Pricing models that span a range from low-end freemium to high-end premium services.

Magic Quadrant

Figure 1. Magic Quadrant for Meeting Solutions



Source: Gartner (September 2019)

Vendor Strengths and Cautions

Adobe

Adobe offers Adobe Connect as SaaS, premises-based, managed service and dedicated deployment options.

Strengths

- Adobe's focus on customers in government, healthcare, financial services and higher education makes it appealing for environments where a meeting solution must be tailored to specific roles or business needs.

- Adobe Connect's feature parity across desktop and mobile clients, as well as its key partnerships for hosting, makes it suitable for global organizations supporting desk and mobile workers.
- Reference customers indicated that the richness of its product feature set is a notable strength of Adobe Connect.

Cautions

- Adobe has not invested in pursuing some innovations, such as virtual assistants, its own integrated digital whiteboard hardware or integration with smart devices that competitors have.
- As a stand-alone meeting solution, Adobe Connect competes in a market in which cloud office or UCaaS vendors have demonstrated larger deployments, greater scale and more significant growth.
- Adobe's reference customers report that additional plug-ins, applets or external products needed to be leveraged to support their meeting use cases.

Avaya

Avaya offers its Intelligent Xperiences (IX) meeting solutions as SaaS, premises-based, hybrid, managed and dedicated hosted deployment models, along with its own branded conference room endpoints. It also offers IX Collaboration as SaaS for workstream collaboration.

Strengths

- Avaya offers a variety of deployment options for its meeting solution, giving customers more configuration choices than typically found in this market.
- Avaya offers IX as an integrated experience within its communication and collaboration suite of offerings — simplifying adoption for end users.
- Reference customers report that the audio and video quality of Avaya's meeting solutions is a strength.

Cautions

- Avaya trails other vendors in the meeting solution space in introducing innovations such as digital whiteboards, conference room smart devices, transcription and leveraging AI to automate the end-user experience in conference rooms.
- Avaya has been late to market with its rollout of a highly scalable, SaaS-based meeting solution, and has not demonstrated wide adoption of its stand-alone meeting solution in the enterprise segment.

- Reference customers surveyed by Gartner stated that they wished Avaya offered more opportunities to interoperate with external meeting solutions.

BlueJeans

BlueJeans offers its BlueJeans Meetings and Events solutions as SaaS, along with partner endpoints for conference rooms and a cloud-based video interop gateway for Microsoft Teams.

Strengths

- BlueJeans has a robust video meeting service and is looking to expand its business through strategic partnerships with Dolby (including a Rooms-as-a-Service option), Microsoft and Facebook.
- BlueJeans has demonstrated that it is listening to its customers by developing new capabilities, such as more efficient meetings processes through its smart meetings initiative.
- Service reliability and improved ease of use were mentioned by BlueJeans reference customers as strengths of its meeting solution.

Cautions

- BlueJeans supports only SaaS-based delivery with typical licensing models. This approach inhibits adoption by organizations desiring freemium and dedicated deployment options.
- BlueJeans needs to generate greater awareness of its capabilities in order to compete more effectively with the better-capitalized leaders in this market.
- According to some of its reference customers, BlueJeans would better serve its customers if it improved its global sales and customer service presence.

Cisco

Cisco offers a variety of meeting solutions, together with a portfolio of video endpoints that span from huddle room solutions to large, customized environments. For premises-based deployments, Cisco Meeting Server is its leading product. Cisco Webex Meetings is offered as SaaS or hybrid deployments. The vendor also offers Cisco Webex Teams as SaaS or hybrid deployments for workstream collaboration.

Strengths

- Cisco's range of video infrastructure, endpoint and application offerings enable more fully integrated deployment options than any other competitor in this Magic Quadrant. Its offering includes hybrid architectures that help maximize quality and security.
- Cisco has a mature and comprehensive vertical industry program that addresses specific use cases as well as regulatory and compliance requirements for various industries, such as healthcare, financial services and the public sector.

- Reference customers note Cisco's ability to deliver its meeting solutions globally as well as customer visibility into its product roadmap as strengths.

Cautions

- Enterprise buyers can face multiple and overlapping UC and meeting-related products from Cisco, which challenge decision making on which product to deploy.
- Cisco's licensing plans continue to evolve, which can create complexity for buyers and channel partners. This is in contrast to the broader market pricing direction toward simplicity.
- Cisco's reference customers reported that Webex Meetings should leverage additional plug-ins, applets or external products to create better workflows with their preferred business applications.

Enhouse Systems (Vidyo)

Having acquired Vidyo in May 2019, Enhouse Systems offers its Vidyo-branded meeting solutions as SaaS, premises-based, hybrid, dedicated and managed service deployment options, along with its branded conference room endpoints.

Strengths

- Vidyo has an extensive range of deployment options and presence in every major global region, with direct sales, distributors and resellers able to provide sales, delivery and support.
- Vidyo has one of the most comprehensive API strategies of the vendors in this Magic Quadrant. This is critical for those customers needing to embed video into business applications with a full range of customization options.
- Ease of deployment and maintenance was cited as a strength by Vidyo's reference customers.

Cautions

- Vidyo trails the other vendors in this market in introducing innovations such as digital whiteboards, conference room smart devices, and transcription of either live or recorded meetings.
- Based on Gartner's vendor survey for this research, Vidyo offers a lower level of guaranteed meeting solution availability for its SaaS-based service versus the majority of vendors in this Magic Quadrant.
- Vidyo's reference customers cited interoperability with legacy or external meeting solutions as a weakness.

Google

Google offers Hangouts Meet and Hangouts Chat as SaaS, along with its own and partner-branded conference room endpoints.

Strengths

- Customers benefit from the ability to create meeting workflows across other G Suite products, as well as from Google's substantial ecosystem of vendor and software partnerships, to further enhance meeting experiences.
- Hangouts Meet is included with G Suite, making it compelling and sensible for enterprises that have "gone Google" to get full value out of their investment by using the vendor's meeting solution.
- Ease of deployment and maintenance was cited as a strength by Google's reference customers.

Cautions

- Google's innovation with meeting virtual assistants is limited to interactions with its @meet chatbot, whereas some competitors have advanced to offer voice command interaction or their own smart devices for enterprise.
- Hangouts Meet is included with G Suite as part of a horizontal collaboration offering. As such, unlike some competitors, the Google offering is not customized for particular vertical industries.
- Google's reference customers want Hangouts Meet to offer better interoperability with legacy or external meeting solutions.

Huawei

Huawei offers its own conference room endpoints and infrastructure for premises-based deployments, and its eSpace cloud-based meeting solution platform as SaaS.

Strengths

- Huawei includes several product features that most vendors in this Magic Quadrant lack, including virtual breakout room support, automated translation of meeting transcripts into two other languages, and native support of its room systems for using displays as digital signage.
- Huawei has a track record of responding to changing market expectations for meeting solutions, having introduced capabilities such as flexibility in meeting recording archiving and retention, and extended options for meeting recording exports to third-party services.
- High-quality audio and video was mentioned by Huawei's reference customers as a strength of its meeting portfolio.

Cautions

- Huawei has limited adoption processes and programs to help customers succeed with deployments of its meeting solution.
- Huawei's reference customers noted a desire for more integration options with business software applications and cloud-based services.
- As of August 2019, Huawei is facing economic sanctions from the U.S. government. The impact is unknown due to changing details of potential restrictions, but reduced availability of some of its products and services globally may be possible.

Lifesize

Lifesize Icon meeting room systems can be purchased in tandem with a subscription to the Lifesize Cloud conferencing service, or as a stand-alone endpoint.

Strengths

- Lifesize has aggressively expanded its channels to market and sales initiatives in EMEA and APAC, and accompanied those efforts with a wide range of licensing offers to meet local preferences for purchase and service platform engagement.
- Lifesize offers a meeting solution with integrated videoconference room endpoints and a robust feature set, offering capabilities that some of its competitors do not. These include wireless screen presentation, digital signage and virtual meeting assistants.
- The quality of audio and video as well as ease of deployment were cited as strengths by Lifesize's reference customers.

Cautions

- Lifesize needs to expand its options for improving content delivery and reducing internal network congestion for large video broadcasts, such as town halls and webinars.
- Larger enterprise customers sometimes do not include Lifesize in their considerations for meeting solutions, mainly due to lower market awareness compared to other vendors in this Magic Quadrant.
- Some of Lifesize's reference customers desire a stronger global sales and customer service presence to support their multinational enterprise.

LogMeIn

LogMeIn offers GoToMeeting, GoToTraining, GoToWebinar, GoToRoom, GoToConnect and join.me as SaaS, along with partner endpoints for conference rooms.

Strengths

- LogMeIn has focused on improving meeting workflows, as evidenced by its extensive integrations to third-party productivity, scheduling and sales acceleration solutions. It has also focused on developing meeting transcription as a default feature of its products.
- LogMeIn operates meeting solutions that are popular among enterprises and LOBs, and at a scale greater than most of its competitors in this Magic Quadrant.
- Reference customers surveyed by Gartner report the vendor's service reliability and consistency, as well as the responsiveness of customer service, as strengths.

Cautions

- LogMeIn may not be suitable for organizations that desire innovation around physical digital whiteboard meeting endpoints, for which competitors have productized offerings.
- LogMeIn's support for live broadcast does not include technology to accelerate video delivery on internal networks, which is often useful in the live town hall broadcast scenario. Some competitors have their own video optimization technology or partner with third parties for this.
- Better interoperability with legacy and external meeting solutions is desired by LogMeIn reference customers.

Microsoft

Microsoft offers Skype for Business for hybrid, premises-based, dedicated and managed service deployment. It also offers Skype for Business Online and Microsoft Teams as SaaS. The vendor offers a portfolio of partner-branded conference room endpoints for Microsoft Teams, and its own Surface Hub device for collaboration.

Strengths

- Microsoft's deployment options make it a flexible choice suitable for most organizations. It offers a free version of Microsoft Teams that would be useful for organizations wishing to experiment and compare against other workstream collaboration and meeting offerings.
- Microsoft has demonstrated its focus on customer experience by addressing the needs of enterprise IT buyers and common workforce roles, supporting customer success with extensive change management materials, processes and partners, and with deployments in large customer environments.
- Reference customers surveyed by Gartner report Microsoft's pace of innovation and improvements as well as service consistency as strengths of Microsoft Teams.

Cautions

- To plan and execute large live meeting broadcasts with Microsoft technologies requires an understanding of multiple products (Microsoft Teams, Microsoft Stream, Yammer), multiple

event models (e.g., production studio quality or self-service) and possible third-party video delivery optimization (e.g., ECDN, P2P or multicast).

- Microsoft Skype for Business and Microsoft Teams are horizontal communication offerings. Microsoft Teams includes some functions for collaboration in educational scenarios but depends on partners for other vertical industries.
- Microsoft's reference customers report a desire for better interoperability with external meeting solutions when using Microsoft Teams.

Pexip

Pexip offers its cloud-based meeting solution platform as SaaS, and its virtualized video infrastructure software, Infinity, as a premises-based or managed service.

Strengths

- The merger of Pexip with Videxio at the end of 2018 has created a scalable videoconferencing solution that provides a unified experience across mobile, desktop and conference room endpoints.
- Pexip's partnerships with Microsoft and Google enable it to offer video interoperability between those cloud office UC solutions and group videoconferencing systems across the enterprise estate.
- Interoperability with legacy and external meeting solutions is a notable strength of Pexip, according to its reference customers.

Cautions

- Although Pexip has a native capability to optimize video over a WAN, it does not partner with any other vendor for content delivery/acceleration networking or peer-to-peer delivery.
- Pexip does not directly offer client- or server-based meeting recording options. However, it does integrate with cloud- and premises-based third-party recording and archiving services.
- Reference customers say they want Pexip's meeting solution to leverage plug-ins, applets or external products to satisfy their complex meeting use cases and workflows.

PGi

PGi offers SaaS and hybrid deployment models for its GlobalMeet suite, and also offers a stand-alone audioconferencing service.

Strengths

- PGi's GlobalMeet portfolio has the capabilities and global reach to satisfy businesses of all sizes and locations, with meeting solutions that are anchored in its well-established audioconferencing service.

- GlobalMeet's Webinar and Webcast offerings include the required capabilities to deliver a highly scalable, feature-rich experience for large corporate events.
- Reference customers cite quality of audio as a strength of PGI's GlobalMeet offerings.

Cautions

- PGI's pace of innovation trails that of some vendors in this market, specifically with respect to improving conference room experiences through the use of automation and smart devices.
- GlobalMeet is designed to satisfy the generalized meeting solution market, but lacks the partners and integration options to deliver a portfolio of vertical market solutions.
- The GlobalMeet client is less intuitive than some of its reference customers would like. Application leaders should anticipate budgeting more time for end-user training when deploying GlobalMeet.

StarLeaf

StarLeaf offers a SaaS deployment option for its StarLeaf Cloud meeting solution along with its portfolio of conference room endpoints.

Strengths

- StarLeaf's video collaboration solution is resonating with buyers seeking a reliable platform that delivers high-quality meeting experiences in its conference rooms. This is evidenced by the vendor's impressive growth in its targeted markets.
- StarLeaf has implemented a multichannel customer success program that helps clients get onboard the service quickly, and analytics to support growth in adoption across the user community.
- Ease of deployment and interoperability with external meeting solutions are reported as strengths by StarLeaf's reference customers.

Cautions

- StarLeaf's meeting service is offered as SaaS only, which can limit adoption by organizations requiring premises-based or dedicated hosted deployment options.
- StarLeaf offers fewer options for recording meetings than other vendors in this market, which may be a problem for organizations that need more flexibility and capability in how meetings are recorded and archived with video content management systems.
- Some reference customers said they desire a wider global sales and customer service presence from StarLeaf.

TrueConf

TrueConf offers TrueConf Server for premises-based deployments and TrueConf Online as SaaS, along with partner endpoints for conference rooms.

Strengths

- For the regions in which the vendor operates, TrueConf's focus on areas such as government, legal, healthcare and education makes it appealing for environments where a meeting solution must be tailored to specific vertical industries.
- TrueConf has a rich feature set for conference rooms, desktops and mobile devices. This feature set supports industry standard and legacy video systems, and leverages machine learning and other techniques for bandwidth adaptation and to support high-quality video.
- TrueConf's meeting solution consistency and reliability was mentioned as a strength by its reference customers.

Cautions

- TrueConf has not invested in some areas where competitors are innovating, such as with physical digital whiteboards or smart virtual personal meeting assistants.
- Most customers use TrueConf Server rather than TrueConf Online, with scalability capped at 250 participants for Server and 120 participants for Online. TrueConf's architecture has acceleration technology to improve video on internal networks, and the vendor has external CDN partnerships, but buyers should validate what third-party elements will be needed to run very large live webcasts.
- Wider global presence and integration with business applications are desired by TrueConf's reference customers.

Zoom

Zoom offers SaaS, hybrid, managed service and dedicated deployment options for its Zoom Meeting and Zoom Video Webinar solutions, along with its partners' conference room endpoints.

Strengths

- Zoom's wide array of deployment options, including freemium, allows organizations flexibility when considering how best to consume its increasingly popular video collaboration service.
- Zoom's rich meeting solution feature set, expanding partner community, and integration with services such as Slack and RingCentral are driving demand for the vendor's services by end users and IT organizations alike.
- Service reliability and the pace of innovation and improvements were cited by Zoom's reference customers as strengths.

Cautions

- Zoom maintains both direct and indirect sales channel selling processes. This can sometimes lead to sales channel conflicts, which can confuse IT buyers or lengthen negotiations unnecessarily.
- The cost to purchase Zoom's meeting solutions is typically lower than that of most competitors, but buyers need to be aware that the items bundled in at no additional cost initially may carry a price increase upon service renewal.
- Zoom's reference customers cite a desire for more integration options for their preferred business applications, as well as better interoperability with external meeting solutions.

ZTE

ZTE offers SaaS, hybrid, managed service and dedicated deployment options for its TrueMeet meeting solutions, along with its portfolio of conference room endpoints.

Strengths

- ZTE offers the features and endpoints required to meet the demands of IT buyers who want to offer their end users a high-quality videoconference experience.
- ZTE offers a variety of deployment options for its meeting solution, giving customers more configuration choices than typically found in this market.
- Reference customers report high-quality video and service reliability as strengths of ZTE's meeting solution.

Cautions

- ZTE's meeting solutions are designed to satisfy the generalized videoconferencing market, and lack the integration options to deliver vertical market solutions.
- ZTE's primary product and service partner community is in China. Organizations with facilities outside of China should ensure there will be sufficient product supply and support in their regions.
- Reference customers surveyed for this report cite a desire for better TrueMeet integration options with their preferred business applications from ZTE.

Vendors Added and Dropped

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

Added

- *Avaya* — The revenue for its meeting segment in the UCC portfolio now exceeds the required threshold.
- *Enghouse Systems (Vidyo)* — Enghouse has acquired Vidyo, which has appeared in prior iterations of this research.
- *Pexip* — Its merger with Videxio now provides for the service delivery capabilities that enterprise IT buyers require.
- *TrueConf* — The revenue for its meeting solution now exceeds the required threshold.
- *ZTE* — It has featured in prior iterations but was excluded from the 2018 report because of export-control-related political decisions that impacted its operational status at that time.

Dropped

- *Arkadin* — Shifts in its portfolio have resulted in its latest offerings not meeting the inclusion criteria.

Inclusion and Exclusion Criteria

We use the same criteria for both the Magic Quadrant and Critical Capabilities research:

- The solution must provide at least the following functionality:
 - **Presentation delivery** — All participants can see an online presentation, which is under the control of one participant designated the presenter.
 - **Desktop or application sharing** — All participants can see, but not necessarily directly interact with or modify, the presenter's desktop or a specific application on the presenter's system.
 - **Text chat** — Participants can exchange real-time textual messages with other participants or the presenter using an instant messaging (IM)-like interface.
 - **Basic security** — Encrypted data transfer, password-protected meetings, and host controls that reveal meeting attendees, as well as mute, block and drop those attendees.
 - **Integrated VoIP audio** — To remove or reduce the need for telephone-based audio, qualifying solutions must offer the option to use a speaker and microphone (or a headset) to enable participants to listen and speak from their PCs, Macs or mobile devices.
 - **Video** — The solution must show live multiparty video feeds of presenters and participants from desktop clients, room systems or mobile devices.
 - **Mobility** — Specific support for audio, video and content sharing from mobile devices and tablets.

- **Reporting** — Detailed reporting for user and room participation, call, device and feature usage (content share, video, recording, whiteboard, etc.), and service performance metrics (QoS).
- **Meetings** — Support for at least 50 individual participants. Participants are defined as individuals joining from their own client or a group video system (e.g., multiple people joining from a single conference room on one group system counts as one participant). Solutions that support only one-to-one interaction or small groups are not covered by this research.
- **Webinars** — Live streaming of large meetings or webinars with more than 1,000 concurrent participants, as well as integration with content delivery networks for live streaming of large-scale webinars.
- The vendor must have at least \$15 million in annual revenue in its last fiscal year from sales of meeting solution products or cloud services, **and** must validate that revenue via public filings, CEO/CFO attestation or audited statement.
- The vendor must develop and market its primary meeting solution, not only resell a meeting solution produced by another company. Additionally, the vendor must illustrate that at least 40% of its total meeting solution revenue in 2018 was attributed to selling its **own meeting solution** — defined as offering the required functionality as shown above.
- The vendor must identify at least five reference customers that validate enterprise-scale deployments (whether on-premises or cloud-based). This research focuses primarily on the large and very large enterprise market (vendors primarily focused on SMBs are not included). At least one reference customer must have more than 1,000 seats of internal users.
- Sales and marketing efforts connected with the solution must not be limited primarily to a particular vertical or horizontal process (such as training).

Evaluation Criteria

Ability to Execute

Several factors contributed to the vendors' positions on the Ability to Execute axis:

- We evaluated the capabilities of the vendors' products separately for basic and advanced functionality. This factor carried a higher weighting this year in the evaluation, as IT buyers are increasingly looking for meeting solutions that can satisfy a variety of meeting scenarios and collaboration experiences.
- As this market includes several small and midsize vendors with uncertain futures, financial viability was an important factor.

- We judged the customer experience by assessing rollout and adoption programs, reviewing the extent to which the vendors support their largest enterprise customers and surveying users identified as reference customers by the vendors.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (September 2019)

Completeness of Vision

We evaluated the vendors’ Completeness of Vision by examining customers’ requirements for usage and purchasing, and by assessing how the products aligned with these requirements:

- To evaluate vendors’ marketing and product strategies, we looked at how they position their products and whether their products adequately address the chosen positioning.
- We rated the sales and product strategies that offer flexibility in supporting multiple deployment models higher than a strategy of concentrating on more limited deployment models and meeting use cases.
- We evaluated vendors’ product innovation and ability to address the trends we expect to see in the meeting solution market. This factor carried a higher weighting in the evaluation this year as this market is seeing an increasing pace of innovation due to the influence of AI and automation.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓

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

Source: Gartner (September 2019)

Quadrant Descriptions

Leaders

Leaders have achieved significant influence and market share relative to their competitors in the meeting solution market, while demonstrating an ability to respond to customers' needs. Leaders have robust, scalable meeting solutions with a wide range of features to satisfy all meeting scenarios, a large installed base, acceptable financial performance and good distribution. Leaders are doing well today and are prepared for the future.

Challengers

Challengers are characterized by operational excellence and good standing in the meeting solution market. Compared with Leaders and Visionaries, their solutions may lack the same pace of innovation and the collaboration or host control features to support all meeting use cases. Additionally, they may lack the necessary licensing model flexibility and offerings to satisfy vertical market requirements.

Visionaries

Visionaries typically have important, unique and/or well-developed collaboration capabilities in their meeting solutions. They provide key innovations that point to the future of this market, and have the features needed to satisfy a variety of meeting solution use cases. However, they have not yet developed a large installed base or sufficiently substantial finances to be considered a Leader and influence the whole market.

Niche Players

Niche Players have good technology in their meeting solutions and should be considered by many businesses in order to satisfy their meeting requirements. They are, however, limited by their size, competitive pressures from more influential vendors, geographic reach and/or financial circumstances. Some have chosen a niche strategy (for example, regional vendors with a local focus, or targeted functionality such as premises-based videoconference room solutions).

Context

Meeting solutions are often purchased by departments and LOBs. Application leaders in the digital workplace responsible for collaboration, real-time technology and infrastructure should:

- Ensure desirable collaborative user experiences by first determining the types of meetings held by their organization.
- Prioritize ease of use by selecting technologies and collaborative capabilities that will be accessible to and appreciated by both the meeting organizers and their attendees.
- Engage technical architects to map out a future architecture with respect to real-time technologies.
- Influence sourcing/procurement officers to ensure that future investments in real-time technologies are aligned and can be integrated with the established architecture.

Meeting solution decisions should be made together with other decisions about communications and collaboration infrastructure.

Market Overview

The meeting solution market is composed of a diverse set of vendors vying to satisfy the widening set of meeting and collaboration use cases typically found in businesses of all sizes. Given the dynamic nature of the meeting solution market, application leaders responsible for communications and collaboration have a rich variety of solutions to choose from. Furthermore, buyers for both whole enterprises and LOBs can select from freemium, best-of-breed stand-alone and bundled software and hardware offerings to suit a range of needs, from the smallest online meeting to the largest webcast.

Vendors in this Magic Quadrant include:

- Vendors with branded endpoints for the conference room mated to their cloud or premises-based meeting or UC solution — Avaya, Cisco, Huawei, Lifesize, StarLeaf, Vidyo, ZTE
- Meeting solution vendors with services delivered from mainly a public cloud infrastructure, without their own conference room hardware — BlueJeans, LogMeIn, Pexip, PGi, TrueConf, Zoom
- Business application vendors — Adobe, Google, Microsoft

Buyers tend to gravitate toward one of these groups when selecting vendors to investigate, based on related IT investments and services, preexisting relationships, brand awareness, or buying center.

Other significant vendors exist in the market but did not qualify for this Magic Quadrant:

- Vendors with meeting solution components — for example, Creston, Logitech, Poly

These and other vendors offer valuable and complementary audio/video components for conference room and desktop environments. They do not, however, have the full portfolio of meeting solution capabilities as defined in the inclusion criteria for this Magic Quadrant:

- Multiservice carriers focused on the audioconferencing market — for example, BT, Verizon, West (Intercall)

These multiservice carriers primarily depend on selling audioconferencing services bundled with a third-party meeting solution provider, such as Cisco.

Meeting solutions are deployed using several different delivery models. SaaS is the most prominent, but there are also options for premises-based, hybrid, managed and dedicated services — and there are buyers for all types. SaaS deployments enable organizations to receive the benefits of UCC without investing in UCC infrastructure. Good-quality audio, desktop sharing and desktop video can be preferable because time to deployment can be faster than some HD voice and video solutions, which may require upgrades to the network to support on-net collaboration.

Explanations of the five basic deployment options for meeting solutions are as follows:

- **SaaS** — The meeting solution runs on the vendor's (or a partner's) system on a multitenancy basis. Users access the capabilities over the internet and sometimes over managed or private data networks.
- **Premises-based** — Software is installed on systems owned and operated by the client enterprise.
- **Hybrid** — The SaaS and on-premises models are combined by allowing segmentation of users across either environments, or failover from on-premises to SaaS, in either automated or manual fashion, in high-load conditions or when disaster strikes.
- **Managed service** — IT management of the meeting solution is fully outsourced and managed directly by the vendor or a third-party provider.
- **Dedicated service** — The SaaS and managed service models are combined by fully outsourcing the management of a meeting solution directly to the vendor, but with dedicated hardware resources allocated solely to the enterprise customer.

Trends in the Market

Buyers of meeting solutions are increasingly interested in converged solutions that offer embedded audio, along with video and collaborative capabilities (e.g., screen sharing, virtual whiteboards). The market's focus has shifted away from narrow categories based on delivery mechanisms toward broader, ubiquitous access. Meeting technologies have developed in the past few years to allow users to benefit from the collaborative experiences whether they are using videoconference room systems, sitting at their desks using desktop or web clients, or accessing from mobile devices. While the cloud-based meeting solutions vendors initially focused on delivered services to PC clients and mobile apps, more care has been taken in recent years to improve ease of accessibility from videoconference room systems.

Support for Collaboration Modes

Meeting solutions are merging with asynchronous office collaboration (referred to by Gartner as "workstream collaboration"), social networking and the use of CRM applications. It is becoming more common to see capabilities associated with these areas only a single click away, to improve responsiveness and speed of collaboration with partners and customers.

Workstream collaboration applications blend multiple collaboration and communication modalities, such as messaging, content and meetings. They both augment and displace traditional meeting solutions in the enterprise by enabling more-fluid execution of nonroutine work. Examples of such applications are Cisco Webex Teams, Google Hangouts Chat, Microsoft Teams and Slack, as well as many emerging competitors.

Taken to another level, the cost-effective integration of meeting solutions with cloud office services such as Microsoft Office 365 and Google G Suite represents the additional convergence of synchronous and asynchronous collaboration. The momentum behind cloud office services is one factor exposing more end users to meeting solutions for collaboration. It also affects stand-alone meeting solution vendors, as buyers seek to optimize costs.

Integration With UCC Infrastructure

Integration of meeting solution capabilities with UCC infrastructure gives UCC vendors strong leverage in enterprises. Best-of-breed meeting solution vendors must ensure integration with UCC offerings to gain further traction in enterprises beyond individual LOBs.

The democratization of video by the use of mobile endpoints — whether through bring your own device (BYOD) or corporate-owned, privately enabled (COPE) schemes — is complicated by requirements to support multiple form factors, mobile operating systems and browsers.

Deployments of inexpensive room video systems backed by cloud-based meeting services allow IT planners to lower the cost of adoption of video capabilities.

Vendors and digital workplace leaders are paying more attention to the "huddle room" use case by addressing requirements for smaller work/conference areas that accommodate up to four people and are suitable for ad hoc collaboration.

A desire for absolute consistency of user experience in any meeting context is driving enterprises to acquire meeting solutions that support diverse endpoints. This includes digital whiteboards that, with enough sophistication, can serve as team collaboration devices.

AI Influences

Meeting solution vendors are embedding AI within their products. In this year's Magic Quadrant, approximately 80% of the participating vendors have some version of meeting transcription, much of which is based on natural language processing (NLP) technology with AI. It is common for meeting solution vendors without their own AI technologies to integrate with mainstream technology partners such as Amazon, Google, IBM and Microsoft.

Some vendors are enhancing their AI portfolios through acquisition, such as Cisco, which in 2019 announced its intent to acquire Voicea. Others leverage partnerships with emerging specialist vendors such as Otter.ai. Some vendors have virtual meeting assistants or bots that automate routine work for scheduling, inviting the appropriate people, intelligent search and content management.

Webcasting Functionality

Large-scale webcasting has been the domain of specialist streaming and enterprise video content management vendors. It is increasingly common, however, for high-end meeting solution vendors to handle live streaming requirements at a more modest scale. For example, these vendors offer solutions to support a few hundred or a thousand attendees at a company town hall meeting or a quarterly shareholder meeting. It is becoming more common for these solutions to have integration into public CDNs or internal enterprise CDNs to improve video quality and reduce internet bandwidth usage.

Browser and Application Options

Rich-client applications on the desktop and native mobile apps offer the most features and functionality for presenters, more-intelligent handling of network variability, and better telemetry for service operators. Common browsers continue to increase support for more feature-rich experiences for presenters and attendees alike, leading meeting solution vendors to announce more feature parity between their rich and browser-based clients.

A common expectation is that guests in a browser-only mode with no plug-ins will receive an enjoyable experience, with the added convenience of not needing to download software to their personal devices.

Growing Expectation of Automation in Videoconference Rooms

Ease of use from videoconference rooms has long been a source of end-user frustration and a drain on IT efforts. Vendors in the meeting solution market have begun innovating to bring automated processes to the conference room, including:

- Proximity detection via beacons, sensors or mobile apps to identify users as they enter the conference room, to ensure a more reliable and simpler joining experience.
- Intelligent video framing of meeting participants to provide the best field of view or showcase the active speaker automatically.
- Virtual meeting assistants with speech recognition to drive meeting processes and content management tasks.
- Background noise cancellation/HD audio to improve overall audio experience.
- Facial recognition for logging attendance or identifying speakers.

The Freemium Influence

The influence of the freemium model, which has fueled rapid growth for vendors such as LogMeIn and Zoom, remains strong in this market.

With this type of model, vendors use free services for smaller, less-complex meetings to drive viral adoption of their platforms, often by LOBs. They then upsell more-complex enterprise features, such as higher capacity, integration with room video systems and provisioning via directories, which appeal to IT and procurement buyers.

Enthusiastic uptake of the freemium model has contributed to downward pricing pressure in the meeting solution market. In addition, exposure to free or inexpensive offerings from vendors such as Microsoft and Google has increased users' familiarity and comfort with chat, video and content sharing. Furthermore, the consumerization of IT has encouraged broader adoption of meeting technology within enterprises.

Acronym Key and Glossary Terms

CDN	content delivery network
LOB	line of business
SaaS	software as a service
UCC	unified communications and collaboration
VoIP	voice over IP
WebRTC	Web Real-Time Communications

Evidence

In researching this Magic Quadrant, we gathered market information via briefings by and direct surveys of the vendors and their reference customers. We also drew on insights gained from our interactions with Gartner clients.

Note 1

2019 Gartner Digital Workplace Survey

Results presented are based on the 2019 Gartner Digital Workplace Consumer Survey conducted to understand digital workers — specifically, shifts and trends in their sentiments and expectations, their level of engagement, and their satisfaction with the applications that their organization provides.

The research was conducted online from March through April 2019 among 7,261 respondents in the U.S., Europe and APAC. Participants were screened for full-time employment in organizations with 100 or more employees, and were required to use digital technology for work purposes. Ages ranged from 18 through 74 years old, with quotas and weighting applied for age, gender, region and income, so that results are representative of working country populations.

Disclaimer: Results of this study do not represent “global” findings or the market as a whole but are a simple average of results for the targeted countries covered in this survey.

Evaluation Criteria Definitions

Ability to Execute

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

Overall Viability: 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/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 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 communication 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.

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 pre-emptive 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.

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