Magic Quadrant for Contact Center as a Service

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The CCaaS market continues to grow, yet buyers face increasing uncertainty from the emergence of generative and agentic AI, and the impending convergence with CRM CEC solutions. This research helps customer service and support technology leaders find the best-fit providers for their needs.

Market Definition/Description

Gartner defines contact center as a service (CCaaS) as solutions offering SaaS-based applications that enable customer service departments to manage multichannel customer interactions holistically from both a customer-experience and employee-experience perspective.

CCaaS is a key technology platform used to support the customer service experience, whether it be self-service or assisted by customer service representatives. All organizations need to offer customer assistance. The preference is for remote support via voice and digital channels over physical presence in offices and stores, though it is common for organizations to offer multiple options.

The ambition is for customers to self-serve assistance, through web portals or chatbots. But it is also recognized that complex issues still need the support of employees. CCaaS technology is instrumental in orchestrating both self- and assisted-service engagement with customers. The technology can also manage the quality of engagement between the customer and the customer service representative, recognizing that premium customer experiences are achieved through premium employee experiences.

Mandatory Features

While CCaaS solutions can support a variety of customer interaction channels, to be considered "CCaaS" the solutions must be anchored in inbound voice routing/automatic call distribution (ACD). CCaaS solutions must also support:

- Application and native communication connectivity, providing voice and data access (telco "points of presence") as well as application hosting on public and/or private data centers to support client access, including in markets where the provider supports connectivity but does not actively market and sell its services.

- The routing of digital interactions (including email, web chat, SMS, social media, video or other channels).

- Prepackaged agent, supervisor and reporting applications, although these environments may be extended using a GUI-based interface or open APIs.

- Workforce engagement management (WEM) that covers some or all of agent staff scheduling and forecasting, call and/or desktop recording and analytics, quality management, agent assistant functionality, knowledge management, and workflow routing of noninteraction work items.

Gartner's definition of CCaaS excludes:

- Hosted contact center services, in which system hardware and software are dedicated to individual customers.

- Managed services, in which hardware and software are dedicated to a particular customer and run on that customer's premises or in a third-party data center, but are managed by a third-party service provider.

- Enterprise server software repurposed as CCaaS offerings.

Common Features

Other common CCaaS capabilities may include:

- Outbound voice (predictive, progressive or preview dialing)

- Customer self-service automation (interactive voice response [IVR]/voice portal, self-service bots, virtual customer assistants)

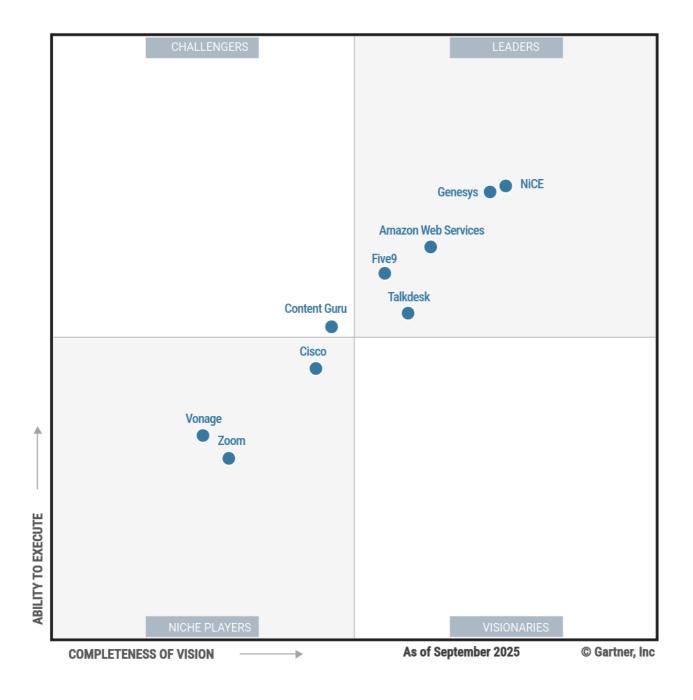- Integration with customer tracking (CRM) and other enterprise databases

- Real-time and historical tracking and analytics

*This document was revised on 8 September 2025. The document you are viewing is the corrected version. For more information, see the **Corrections** page on gartner.com.*

Magic Quadrant

Figure 1: Magic Quadrant for Contact Center as a Service

Amazon Web Services

Amazon Web Services (AWS) is a Leader in this Magic Quadrant. Its scalability and ability to support high levels of customization enable it to fit even the largest and most sophisticated contact center environments. It is sold both directly and through an expanding set of large channel partners, including global system integrators (GSIs) and Salesforce, to businesses of all sizes, from startups to global enterprises. Amazon Connect is especially popular among those that use AWS as part of their cloud, data and AI strategy, including those with existing AWS purchase commitments.

Recent improvements to Amazon Connect include enhanced functionality across manager interfaces, agent applications, end-customer self-service, automated performance evaluations, postcontact summaries, support for email and WhatsApp Business chat, and dashboard and analytics enhancements, among others.

Strengths

- **Customizable solutions:** Beyond supporting preconfigured contact center functionality, Amazon Connect enables organizations to develop their own customized customer service experiences. This can be accomplished by leveraging AWS professional services, in-house resources or through a network of development partners capable of delivering comprehensive solutions using the platform.

- **Leverage AWS AI investment:** Gartner clients report satisfaction with building customer service AI capabilities leveraging AWS' functionally rich AI capabilities such as Contact Lens for conversation analytics, Lex as a chatbot builder and Q, an AI assistant developed for cross-application use cases.

- **Ability to scale:** AWS utilizes the global reach of its cloud infrastructure, investments in AI, and network of consulting and resale partners to provide global solutions with high levels of availability. This inherent capability to scale enables Amazon Connect to address the needs of even some of the largest contact center environments.

Cautions

- **Technical skills may be required:** Organizations that aim to build custom-made or highly configured workloads beyond Amazon Connect's out-of-the-box features may require developers proficient in AWS development tools, AWS' professional services or a certified partner to create and maintain these specific adaptations. Prospective buyers should

carefully consider any additional costs that this requirement could introduce to the deployment.

- **Reporting granularity and flexibility:** Based on Gartner client inquiries and Peer Insights reviews, Amazon Connect has out-of-the-box gaps regarding reporting, analytics and dashboard data. Some users note that the reporting features within the user interface lack the desired detail and adaptability. Others find it necessary to export data to external analytics tools for improved data visualization.

- **Cost variability and pricing complexity:** Amazon Connect's consumption-based pricing model requires organizations to assess and project contact volumes to accurately forecast costs across the solution's pay-as-you-go components. This particular pricing model can make it challenging to forecast expenditures where interaction volumes lack predictability.

Cisco

Cisco is a Niche player in this Magic Quadrant. Its Webex Contact Center is a CCaaS platform offered to customers through indirect channel partners. Webex Contact Center continues to drive innovation in line with its product strategy, is actively delivering new features, and is growing its customer base. Gartner finds that the solution is gaining the most traction with midsize contact centers. Webex Contact Center is especially sought by those organizations migrating from Cisco on-premises systems and those preferring to bundle CCaaS and unified communications as a service (UCaaS) from a single provider. It is also sold to larger contact centers and into environments new to Cisco contact center technology, dependent upon their use cases. Webex Contact Center is frequently sold into environments that are also running Webex Calling (UCaaS) but can also be deployed in environments using other UCaaS systems such as Microsoft Teams.

In the last year, enhancements to Webex Contact Center included support for AI agents, outbound campaigns, WebRTC, enhancements to its flow designer tool and platform scalability, among others. Roadmap items include support for skills-based routing, multiple AI-agent interaction flows; AI assistants for coaching, personalization, checklists and guidance; and AI intelligent routing and more.

Strengths

- **Integrated communication platforms:** Webex Contact Center is a preferred choice for organizations already using or planning to bundle Webex Calling with Contact Center, as

it offers deep integration and enables contractual and administrative simplicity.

- **Global support network:** Leveraging Cisco's extensive history in the contact center sector, the platform benefits from worldwide support for clients, delivered directly or through its network of channel partners.

- **Advanced AI security measures:** Cisco's investments in AI Defense provide built-in AI security capabilities. These include the ability to detect AI deployments and usage across environments, identify misconfigurations and security flaws; it also responds to threats in real time, both within and beyond customer service operations.

Cautions

- **Multiple administrative interfaces:** Webex Contact Center may necessitate the use of several separate administrative interfaces for different components. This can create difficulties during initial setup, configuration management and in delivering a consistent customer experience across both voice and digital channels.

- **Limited third-party integrations:** Webex Contact Center offers a limited set of third-party integrations available through the Webex App Hub relative to other vendors profiled in this Magic Quadrant. Prospects considering Webex Contact Center should thoroughly vet the system's native capabilities, those of its technology partners, and the effort and cost required to develop and support any required third-party integrations not supported through the partner portal.

- **Feature set maturity:** Webex Contact Center is one of the newer CCaaS offerings among those profiled in this report and some clients indicate that they find the overall feature set to be less robust than those from other vendors. Prospects should validate feature enhancements and the roadmap to ensure that the platform's functionality meets their critical requirements now and in the future.

Content Guru

Content Guru is a Challenger in this Magic Quadrant. Its storm CONTACT product is sold primarily into large organizations with deep integration and customization needs, particularly organizations with headquarters in the U.K. and Europe. Content Guru sells into a wide variety of vertical markets, with particular strengths in insurance, healthcare, and government deployments. As of this writing, storm CONTACT is the only CCaaS offering on this Magic Quadrant that has achieved FedRAMP High Impact Level Accreditation,

highlighting its strengths in security and compliance capabilities. Content Guru offers a deployment option for those requiring an availability service-level target of 100%.

Recent enhancements to storm CONTACT include work-item routing, intent and entity identification, and enhancements to its real-time transcription, interaction summarization and automated quality management capabilities, among others. Roadmap items include agentic AI-enabled bots; improvements in real-time translation, empathy scoring and next best action recommendations; and enhancements to workflow management functionality, among others.

Strengths

- **Large, complex deployments:** Content Guru brings significant experience in delivering and supporting large, complex system deployments. Businesses with requirements for significant scale and customization should view this experience as a clear benefit.

- **High service availability:** The company demonstrates a track record for deploying in environments demanding rigorous system uptime, including those critical for emergency services that require 100% availability.

- **AI service orchestration:** Content Guru's "brain" offering serves as an AI orchestration layer, enabling clients to match their own internally developed AI workflows or those from major third-party providers with a variety of customer service use cases.

Cautions

- **Negotiated SLAs:** Unlike many competitors, Content Guru does not make its standard service agreement publicly available, nor does it publish details regarding credits for failing to meet availability service-level targets. Prospective buyers should therefore assess comparative SLAs and be ready to negotiate for meaningful terms.

- **Complex pricing:** Content Guru's pricing approach can make it challenging for customers to get a clear understanding of the solution's overall cost of ownership. This difficulty stems from the multitude of a la carte licensing components and their associated charges, which can add to ownership costs.

- **Support resolution time:** Customers have noted that the inherent complexity and high degree of customization involved in many Content Guru deployments create challenges with diagnosing and resolving issues related to system functionality and performance when they arise.

Five9

Five9 is a Leader in this Magic Quadrant. Five9 Intelligent CX Platform sells largely into organizations of all sizes in the U.S., including U.S.-based multinational organizations, with increasing capability to support organizations in other geographic regions. The company supports a number of customers with more than 10,000 agents and provides integrations into a wide variety of vertical market applications. Five9 was the first vendor in this Magic Quadrant with an AI studio offering, providing a packaged set of tools for developing, testing, deploying and tuning AI-enabled virtual assistants. This includes the ability to compare performance levels of different large language models (LLMs).

Recent enhancements to Five9 Intelligent CX include its launch of AI agents, intent and entity identification, generative AI (GenAI) studio tools and enhanced integration to Salesforce and ServiceNow, among others. Roadmap items for Five9 Intelligent CX Platform include chat AI agents, AI-enabled interaction routing and in-queue call treatments, and enhancements to LLM-based guidance and next best actions for chat and SMS interactions, among others.

Strengths

- **Support services:** Customers frequently commend Five9's technical account managers for their strong postsales assistance and their ability to help clients achieve value.

- **Broad market fit:** Five9 continues to expand its solution delivery capacity, moving beyond its traditional emphasis on midsize contact centers. The platform is now being deployed in settings with hundreds or even thousands of agents, including those with complex deployment needs.

- **AI and speech recognition:** Gartner analysts have seen a high attach rate for its AI Agent functionality in Five9 deployments and contract reviews. This indicates the company's extensive experience in implementing these solutions.

Cautions

- **North America-centric operation:** Even with its global expansion, Five9 is still predominantly a North America-focused CCaaS provider. Prospective buyers outside of North America may find that managing the supplier relationship, including service and support, could necessitate more internal resources or help from certified partners.

- **SLA credits on contract renewals:** While Five9 has enhanced its SLA credits for service degradation or outages, Gartner frequently notes that renewal agreements do not always incorporate these updated provisions. Customers renewing their Five9 service contracts should verify that the contract terms align with the current SLAs.

- **Native WFM functionality:** According to Gartner clients and Peer Insights survey respondents, the scheduling and forecasting features of Five9's native workforce engagement management (WEM) solutions may be insufficient for some deployments. Prospective Five9 customers must evaluate whether their workforce management (WFM) requirements can be satisfied by Five9's native capabilities or whether they will be better served using one of the company's WEM partners.

Genesys

Genesys is a Leader in this Magic Quadrant. Genesys Cloud CX can be a fit for organizations of all sizes, vertical markets and geographic requirements, particularly those valuing customer journey analytics, AI and deep integration to CRM customer engagement center (CEC) systems. Genesys has successfully leveraged its experience in global sales, marketing and operations of on-premises contact center solutions to continue the rapid and sustained growth of its Genesys Cloud CX business. The offering is sold both directly and through channel partners. Genesys Cloud CX supports a variety of AI-enabled capabilities, including agent and supervisor AI assistants, and virtual agents and supervisors, priced as a combination of packaged software and consumption tokens.

In the last year, Genesys added capabilities to its platform, including enhanced integration with ServiceNow, agent and supervisor AI assistants, social listening and engagement, a packaged AI pricing bundle and enhancements to its customer journey management offering, among others. At the time of evaluation, Genesys's roadmap included Genesys Cloud AI Studio and AI Guides. These features have since been launched, but were not part of the original assessment. The Genesys roadmap includes admin AI assistants, AI coaching, multiarticle retrieval-augmented generation (RAG), mail virtual assistant and AI agent checklists, among others.

Strengths

- **Large, complex deployments:** Genesys has extensive experience supporting the customer service needs of large, complex multinational deployments and supports a wide variety of languages in its agent and admin UIs. Organizations with such deployments should consider Genesys' experience in this area as an advantage.

- **Easy on-premises-to-cloud migration:** Genesys' solution includes strong tools and processes to migrate customers either from its other offerings or from competitors' on-premises platforms to Genesys Cloud CX.

- **Adaptability and innovation:** Genesys Cloud CX is known for its customizability and the frequent release of new capabilities. Customers give the company high marks in these areas in Gartner client inquiries and Peer Insights reviews.

Cautions

- **Out-of-the-box reporting:** Gartner clients frequently express disappointment regarding the lack of comprehensive native support for reporting and analytics. As a result, they may find it necessary to rely on add-on solutions from Genesys or external solutions from technology partners delivered through the AppFoundry marketplace.

- **Native WFM functionality:** According to Gartner clients and Peer Insights survey respondents, the scheduling and forecasting capabilities inherent to Genesys Cloud's Workforce Engagement Management (WEM) offerings can be insufficient for organizations with more unique staffing requirements. This may lead organizations to seek third-party solutions from Genesys' AppFoundry partners.

- **AI deployment timelines:** Gartner clients are increasingly voicing frustration as Genesys' deployment times for AI projects often extend beyond initial expectations. Clients considering deploying Genesys AI capabilities should work closely with their account team to validate the proposed functionality, availability of deployment resources and readiness of their own data environment to meet deployment commitments.

NiCE

NiCE is a Leader in this Magic Quadrant. CXone Mpower, its specialized CCaaS platform, is offered both directly and through channel partners. NiCE CXone Mpower appeals to organizations of all sizes and geographic locations that are seeking strong capabilities for customer service analytics, workforce engagement management, knowledge management, AI and automation. The company can mine its decades of call recordings along with its process mining and automation capabilities to rapidly create, customize and deploy new interaction flows, including AI-enabled ones.

Recent enhancements to NiCE CXone Mpower include new interaction and workflow development tools and back-office quality monitoring. There are also additional

enhancements to its proactive outreach capabilities, knowledge management and AI studio capabilities, among others. NiCE's roadmap items include expanded agentic AI, enhancements to its AI studio functionality, workflow components in CXone Mpower AI Orchestrator, AI-generated quality management, coaching simulator and gamification, among others.

Strengths

- **Large, global account support:** NiCE has a strong ability to implement and support CCaaS for large, multinational clients based on its experience delivering its WEM capabilities to customers with similar environments dating back to its on-premises solution heritage. This includes the ability to provide localized support as well as cross-organizational solution coordination.

- **Advanced AI and analytical capabilities:** NiCE's strong AI and analytics features are built upon the company's vast stores of labeled data for customer intentions and actions. These capabilities leverage data from successful past interaction sequences and robust knowledge management functionality to develop AI assistants.

- **Technical account manager support:** In both client inquiry and Peer Insights reviews, customers frequently commend NiCE's technical account managers for their strong postsale support and their effectiveness in helping clients gain value from the product.

Cautions

- **AI deployment times:** Gartner clients are increasingly voicing frustration regarding NiCE's AI project deployment times, which often exceed initial expectations. Clients considering deploying NiCE AI capabilities should work closely with their account team to validate the proposed functionality, availability of deployment resources and readiness of their own data environment to meet deployment commitments.

- **Support challenges for midsize customers:** Some of NiCE's midsize customers have encountered difficulties with support services, as indicated in Gartner client inquiries and Peer Insights reviews.

- **Troubleshooting tools:** Some Gartner clients and Peer Insights survey respondents have reported challenges when using NiCE's tools for diagnosing configuration issues.

Talkdesk

Talkdesk is a Leader in this Magic Quadrant. Talkdesk CX Cloud is offered both directly and through channel partners. The platform offers tight integration across a breadth of functionally rich, natively built contact center capabilities. The vendor provides a well-developed set of vertical market packages that include integrations with common systems and applications as well as templatized and customizable agent desktops and AI use cases. Talkdesk also provides workflows for common interaction flows in those verticals. With a distributed geographic footprint, Talkdesk presents a strong service proposition for multiregion organizations, particularly those headquartered in North America or Europe.

In the last year, Talkdesk added capabilities such as agentic AI functionality and usage templates, knowledge discovery tools and the ability to run its AI capabilities on other vendors' CCaaS platforms, among others. Talkdesk's roadmap includes continued development of its process mining and automation capabilities, enhancements to its multi-AI agent functionality, real-time AI coaching and AI-enabled outbound engagement, among others.

Strengths

- **Account managers:** Customers frequently express satisfaction with the responsiveness and expert guidance provided by Talkdesk's technical account managers and customer success managers. These resources offer strong postsale support and assist clients in extracting value from the product, as noted in Gartner client inquiries and Peer Insights reviews.

- **Industry-specific solutions:** Talkdesk provides prepackaged products for various key industries. These include sectors such as banking, insurance, healthcare (for both payers and providers), retail, government and utilities, among others. These offerings enable deep integration with core systems and applications and the ability to deliver preconfigured, AI-enabled workflows and industry-specific natural language processing (NLP) models.

- **Expanding market:** Historically, serving primarily midsize contact centers, Talkdesk is increasingly deploying its platform in larger contact centers that employ hundreds or even thousands of agents.

Cautions

- **Remote technical support:** Some customers have noted challenges with response and resolution times for remote technical support as observed in Gartner client inquiries and

Peer Insights reviews.

- **Geographical limitations:** Talkdesk's primary focus on the North American and European markets raises questions about its focus on serving clients in other regions. Potential buyers should ensure that the company can meet their specific geographic requirements.

- **Third-party partners:** Some customers have noted that Talkdesk is less inclined to partner with external technology providers to enhance their solution compared to other vendors in the market. This potential reluctance can increase custom development costs and extend deployment timelines when customers are encouraged to build certain features themselves rather than integrate prepackaged offerings from third-party vendors.

Vonage

Vonage is a Niche Player in this Magic Quadrant. Vonage operates as a wholly owned subsidiary of Ericsson but under the Vonage brand. Vonage Contact Center (VCC) is sold as a stand-alone CCaaS solution. The company also offers Vonage Fusion combining VCC functionality with UCaaS and AI underpinned by CPaaS capabilities. Historically, Vonage has differentiated based on a strong integration with Salesforce Service Cloud; however, in recent years, it has expanded its integration capabilities with other CRM CEC offerings. VCC has good market adoption among contact centers averaging fewer than 300 agents, although the system can scale much larger.

Recent enhancements to VCC include native support for digital channels, AI transcription and summarization, and enhancements to workforce management, among others. Vonage's AI roadmap includes, among other capabilities, multilanguage virtual assist, Salesforce AgentForce integration, bring-your-own-bot integration, and agent assist including knowledge base article recommendations, next best action recommendations and automated checklists.

Strengths

- **Tight UCaaS and CPaaS integration:** Vonage Fusion CC offers tight integration with Vonage's Unified Communications as a Service (UCaaS) collaboration portfolio and its Communications Platform as a Service (CPaaS) API tools. Vonage Fusion CC also supports integration with Microsoft Teams.

- **Salesforce Service Cloud integration:** VCC features strong integration with the Salesforce Service Cloud. Its ability to be embedded into the Service Cloud desktop and

leverage Service Cloud functionality consistently receives high ratings from customers on the Salesforce AppExchange.

- **Optimized for midmarket deployments:** A significant portion of Vonage's CCaaS business is in the midmarket (below 300 agents). As such, its market strategies, including direct sales and partnerships, are tailored for success within this segment. Customers also find that VCC's simple administrative interface and its AI functionalities are well-suited for less complex deployments.

Cautions

- **Limited multilingual user interface support:** VCC's system administration interface is exclusively in English and provides limited language options for its agent interface. Global enterprises may need to allocate additional resources to handle multilingual operations if they opt for Vonage.

- **System reporting:** Gartner clients have noted difficulties concerning VCC's native system reporting capabilities. Potential customers should include the resources required to build and support customized CCaaS reporting in their total cost of ownership calculations.

- **Tendency toward use of CRM partner technology:** Although Vonage now natively supports digital channel and AI functionality, Gartner more typically sees VCC deployments leveraging these capabilities from their CRM partner's platform. This deployment model could potentially lead to increased complexity and cost for the solution.

Zoom

Zoom is a Niche Player in this Magic Quadrant. Zoom Contact Center was launched in 2022 and is the newest offering among those profiled in this Magic Quadrant. Originally sold strictly as an add-on to Zoom's UCaaS offering, it is now also available as a stand-alone system integrated with other UCaaS offerings, including Microsoft Teams. The product is sold primarily into small and midsize contact centers today. However, Zoom is aggressively investing in R&D (including AI capabilities) as well as its go-to-market and support capabilities with the intent of achieving deeper market penetration in larger deployments in the near future.

In the last year, enhancements to Zoom Contact Center included several new interaction

channels, Microsoft Teams integration and several enterprise security and compliance capabilities, among others. Zoom's AI roadmap includes Zoom virtual agents with agentic skills for both chat and voice, advanced quality management, including the ability for supervisors to quickly analyze conversations, and data visualization and reporting, among others.

Strengths

- **Tight UCaaS integration:** Zoom Contact Center is often deployed with the company's collaboration portfolio (UCaaS), enabling deep integration and contractual and administrative simplicity. It also supports integration with Microsoft Teams.

- **Native AI functionality:** As a newer entrant to the CCaaS space, Zoom has been able to design AI functionality into its core architecture. This includes capabilities such as auto intent discovery, auto training, auto message translations, supervisor assist, agent next best actions and guides, among others.

- **Simplified setup and administration:** Zoom Contact Center customers report high satisfaction levels with the ease of system configuration and ongoing administration as indicated in both client inquiries and Peer Insights surveys.

Cautions

- **Breadth of features:** Zoom Contact Center is one of the newer CCaaS offerings among those profiled in this Magic Quadrant, and some clients indicate they find the overall feature set to be less robust than those from other vendors. Prospects should validate that their must-have capabilities include the richness of functionality required and work closely with the vendor to ensure that their future needs will be addressed in the product's near-term development roadmap.

- **Third-party integrations:** In Peer Insights surveys, some Zoom Contact Center customers report challenges with integrating third-party technologies.

- **Cost for new capabilities:** In Gartner client inquiries and Peer Insights surveys, some customers indicate frustration that some functionality expansion comes at an additional cost when it was expected to be included in an existing pricing bundle. Zoom Contact Center prospects should be prepared to negotiate pricing in line with their current and future needs.

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

Zoom was added to this Magic Quadrant.

Dropped

8x8 was dropped from this Magic Quadrant because it did not meet the new inclusion criteria of needing to average more than 100 seats per deployment.

Inclusion and Exclusion Criteria

To qualify for inclusion in this Magic Quadrant, providers need to fulfill all of the following requirements:

- A minimum of $83 million in total revenue as of 31 December 2024, composed of concurrent licenses, named user licenses and application consumption. This revenue stream is restricted to enterprise customers and does not include business process outsourcing (BPO) or contact center outsourcing business. We require a letter of attestation from an appropriate finance executive certifying that the minimum revenue requirements are met.

- A minimum of 10% of CCaaS software license revenue from net new "new logo" clients.

- Average deal size above 100 customer service representatives.

- Demonstrated sales, marketing and operational, including company registration, presence in three of the following geographic regions with each contributing a minimum of 10% of total CCaaS software license revenue:

- North America

- Europe

- South America (including Central America)

- Asia/Pacific

- Middle East and Africa

- Services should primarily be offered on multitenant platforms and multiple instances of microservices software as required to meet the needs of customers across several geographies. (Multitenant software describes how the service provider operates a single software instance on which multiple customers can be supported.) To be included in this Magic Quadrant, vendors need to show how their CCaaS platform is designed to support organizations with customer service teams from 25 users up to many thousands of users. The platform must also be able to support both voice and nonvoice channels. This must be evidenced in the vendor's strategic intent for the CCaaS platform, contract reviews evaluated by Gartner analysts, and analysis of company size in Gartner Peer Insights and Gartner Digital Markets platforms. CCaaS providers need to demonstrate how, irrespective of architecture employed, their software inherently provides all customers with transparent access to the same set of services irrespective of location. Software updates must be simultaneously "pushed" to all customers regardless of location, avoiding the traditional "major upgrade" cycles typical of on-premises or single-tenant hosted/managed deployments.

- Contact center seat license ownership must be retained by the service provider. Customer contracts must allow for elasticity of usage (enabling customers to scale agent licenses or consumption up or down as usage demands change).

- At least 50% of CCaaS service revenue must be from inbound voice user licenses (automatic call distribution [ACD]). Other licenses may include outbound voice (predictive, progressive or preview dialing) and must include routing of digital interactions (including email, web chat, SMS, social media, video or other channels). They may also include IVR/voice portal, WEM, call or desktop recording and analytics, knowledge management, workflow routing of noninteraction work items, integration with customer tracking (CRM) and other enterprise databases, and real-time and historical tracking and analytics. The service must provide prepackaged agent, supervisor and

reporting applications, although these environments may be extended using a GUI-based interface or open APIs.

- Functional breadth: Submitted product must provide all of the mandatory features in the Market Definition.

- Market awareness: Be recognized by the CCaaS market as evidenced by regular appearances on client shortlists, by appearances at tradeshows and by references as a competitor by other vendors.

- Market following: Provide thought leadership, which is adopted by customers of the CCaaS product in live operations through webinars, market-related white papers, blog articles and user communities.

- A CCaaS provider must rank among the top providers in the customer interest index defined by Gartner for this research. Data inputs used to calculate relevancy include Gartner client interest, customer reviews and market awareness.

Gartner's definition of CCaaS excludes:

- Hosted contact center services in which system hardware and software are dedicated to individual customers.

- Managed services in which hardware and software are dedicated to a particular customer and run on that customer's premises or in a third-party data center, but are managed by a third-party service provider.

- Enterprise server software repurposed as CCaaS offerings.

Honorable Mentions

8x8: 8x8 Contact Center offers relevant technology in this market but did not meet the requirement for average seat size.

Dialpad: Dialpad offers relevant technology in this market but did not meet the inclusion criteria for CCaaS revenue.

Microsoft: Launched in 2024, Microsoft Dynamics 365 Contact Center offers relevant technology in this market but did not meet the inclusion criteria for CCaaS revenue spread across geographic regions.

Odigo: Odigo Extended Contact Center (part of CXaaS) offers relevant technology in this market but did not meet the requirement for revenue distribution across geographic regions.

RingCentral: RingCX, launched in 2023, offers relevant technology in this market but did not meet the inclusion criteria for CCaaS revenue.

Sprinklr: Sprinklr Service offers many of the capabilities of CCaaS but is considered by Gartner as a digital customer service vendor because most of its customers do not use a Sprinklr-native telephony platform.

Evaluation Criteria

Ability to Execute

Product or Service: The product platform should include the ability to offer (on a consumption basis) all contact center services expected in a suite platform (for example, IVR and speech, inbound and outbound multichannel contact routing, WEM and analytics). This should include a self-service capability to implement, manage, revise and report on operational performance. This also includes the capabilities of its AI-enabled offerings.

Overall Viability: A number of cloud service providers have yet to achieve profitability, as rapid growth and business expansion plans require investment in technology, people and infrastructure to achieve the business growth plans. Many CCaaS providers are private or a business unit of a larger company, and don't report a detailed balance sheet to examine financial viability. Revenue indications and growth are important factors here as are the overall business strategy for success, which are more readily available to be assessed. We also assess the likelihood that the organization can continue to offer and invest in the product, as well as the product's position in the organization's portfolio.

Sales Execution/Pricing: The market for CCaaS has yet to reach saturation, so there are plenty of opportunities for continued growth. We expect suppliers to be able to demonstrate better than 15% annual growth year on year, with a good selection of references from large or well-known organizations. Cloud services are, by definition, elastic and licensing terms should reflect this, enabling a customer to scale up and down in line with business requirements. While minimum commitments to licenses are to be expected, customers should have the flexibility to vary consumption. Usage-based licensing (per minute/per

transaction) is a useful addition emerging in some providers. We also assess vendors' presales activities and the structures that support these activities.

Market Responsiveness/Record: With a number of new entrants to the CCaaS market taking market share, being an established player is not a major advantage in terms of securing new business. We also assess vendors' ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change.

Marketing Execution: CCaaS providers with strong brand awareness tend to be invited to tender for more opportunities than those without strong brand awareness. This helps them win more business. A comprehensive marketing program is important to attract invitations to bid for opportunities. Brand awareness is also key to developing channels with system integrators, who are less likely to go to market with providers that their customers are unaware of. We also assess Gartner client interest in the vendors' offerings.

Customer Experience: Developing a reputation for consistently delivering reliable services and providing a differentiated customer experience can help suppliers maintain and grow a CCaaS business ahead of the competition. This is especially important as customers commit to a strategic CCaaS provider for multiple regions but still expect to be supported in a timely fashion by a local support organization. Here, we assess customer feedback from a variety of sources.

Operations: Contact centers provide critical front-office operations, and customers need to be confident their CCaaS will be supported by talented, experienced and motivated staff. As customers select strategic suppliers for multiregional needs, CCaaS operations will need to be localized.

Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product or Service	High
Overall Viability	High
Sales Execution/Pricing	High

Evaluation Criteria	Weighting
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	Medium

Source: Gartner (September 2025)

Completeness of Vision

Market Understanding: Understanding the role that a cloud contact center plays in an organization's customer service and broader customer experience strategy — and how it relates to other capabilities — is important for success. Market understanding includes anticipation of market consolidation, new competitors such as CRM CEC players, and how to defend as well as grow relevance. Here, we place particular emphasis on the ability to align with the needs of contact centers with many hundreds or thousands of agents.

Marketing Strategy: Communicating a differentiated strategy in a market where technologies are largely similar is crucial to win mind share. Gartner clients are increasingly asking about using a single provider across multiple geographies, which should be reflected in CCaaS providers' marketing strategy.

Sales Strategy: Striking the best balance between direct and indirect approaches to the market is important when the cost of sale can be very high and compensation impacts cash flow. As customers select a strategic provider for CCaaS, providers must balance customers' desire to deal directly and centrally for contract terms, but be managed locally for regional needs. Managing internal conflict between local sales offices is key to developing strategic relationships with customers.

Offering (Product) Strategy: This criterion covers the vendor's approach to product and service development and delivery that highlights industry requirements, and the speed at

which differentiated or innovative services are added to the platform. Using communities to act on insights from customers to influence product development will be increasingly important as vendors scale. Delivery against product roadmap plans and ease of use for both agent and admin interfaces are also important.

Business Model: The relevance of the commercial model to how a vendor proposes to use a combination of direct sales and channel distribution to scale the availability of its service. Partners need recurring revenue too, and the model through which they can profitably resell and support CCaaS customers is key to the CCaaS provider's success. Here, we also assess vendors' ability to fund operations and growth and their professional services staffing levels to meet direct and channel sales needs.

Vertical/Industry Strategy: A specific focus on industries or other segmentation, such as contact center size, is an opportunity to increase mind share in key target markets, in contrast to a horizontal, all-encompassing market vision. For CCaaS providers with lower marketing budgets and reduced overall mind share, the best opportunity to compete and win against the larger players exists in a differentiated vertical or industry strategy. Here, we also assess vendors' productized industry-specific offerings, productized task-specific offerings and operational focus on delivering vertical market offerings.

Innovation: The vision to see opportunities to differentiate services for customers, either through in-house development or collaboration with innovative partners. Providers should reflect the future of applications as APIs and marketplaces. Here, we also assess vendors' relevance and innovation of near- and long-term product roadmaps, AI-specific functionality in the product roadmap and innovative delivery of advanced functionality.

Geographic Strategy: The vendor's strategy for growth outside its home market, in order to attract a larger audience, is key to meeting the contact center needs of global and multiregion organizations. CCaaS providers' approach to this will be critical to profitable growth. Here, we also assess vendors' direct presence in a variety of geographic markets, partnership presence in a variety of geographic markets and support for a wide variety of languages in agent and administrative UIs.

Completeness of Vision Evaluation Criteria

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

Source: Gartner (September 2025)

Quadrant Descriptions

Leaders

Leaders are best described as suppliers with strong support for a wide breadth of customer service capabilities, and an ability to serve multinational organizations with local sales and support organizations. Leaders are more likely to serve customers through channel partners and have strong brand recognition, which has resulted in a large installed base or above-average market growth as a result of customer demand. Leaders also benefit from being able to support varying levels of deployment complexity, including integrations with partners through established marketplaces.

Challengers

Challengers may have large installed bases of customers, but do not necessarily have the brand awareness or adoption level of Leaders. Challengers are often less mature than Leaders in their multiregional market approach, preferring to focus on strengths in a subset of markets. They may have recognized strengths in serving certain customer-size segments or specific vertical markets. But they are also likely to have less-developed product capabilities than Leaders or to lack marketplace representation.

Visionaries

Visionaries have strong multichannel product and service capabilities and a clear strategy for sales, marketing and business development. They differentiate themselves by adding unique or innovative functionalities or delivery capabilities, which gives them some brand awareness in target markets. Visionaries tend to be smaller than Leaders and Challengers overall, and have more limited investment potential for international expansion.

Niche Players

Niche Players may be quite large or experiencing relatively strong growth, but have decided to focus on a particular market opportunity, a specific set of solutions or certain vertical markets. Their products and services may still be undergoing development, or they may rely heavily on partners to complete their service proposition. Niche Players are likely to be either new or relatively recent market entrants, or suppliers that have yet to build a large customer base.

Context

The CCaaS market is evolving at perhaps its fastest pace since its inception, adding new vendors and technology innovations. CCaaS solutions have seen widespread adoption in environments with fewer than 500 agents but are now gaining traction even in those with more than 10,000 agents. Part of this is driven by greater scalability of the platforms and improved system management tools — which are increasingly on par with those of large-scale on-premises platforms — along with vendors' improved account management and support capabilities. We are also seeing that customers of all sizes are interested in adopting emerging AI, GenAI and agentic AI capabilities. However, many of the on-premises platforms supporting very large contact centers are not being developed to natively support these

capabilities. This leads customers to accelerate their timelines for replacing on-premises CCaaS systems with complete solutions that include AI capabilities.

As the market matures, we are seeing similar functional breadth across most CCaaS vendors. Differentiation largely depends on the depth of those capabilities in areas such as the richness of the digital channel experience, reporting and analytics, and integrations with CRM CEC and enterprise data platforms customized for specific vertical markets.

We also continue to see the CCaaS and CRM CEC markets offering similar and overlapping capabilities. This includes omnichannel routing, process automation and AI-enabled virtual agent assistants and virtual customer assistants, foretelling the likely eventual merging of these markets (see Innovation Insight: Unified CRM CEC and CCaaS Lays Foundation for Future of Customer Service). At present, we find that customers are closely evaluating both CCaaS and CRM CEC vendors' ability to deliver AI-enabled innovations and to articulate a credible AI roadmap, as they consider making near-term commitments in this rapidly evolving technology landscape.

Market Overview

CCaaS market revenue continues to show robust growth and is forecast to grow at a 10.5% compound annual growth rate (CAGR) over the next five years (see Forecast Analysis: Contact Center, Worldwide). However, agent license shipments are not expected to maintain a similar pace (estimated at a 3.7% five-year CAGR). This discontinuity is best explained by the expectation that, as CCaaS continues to sell into larger contact center environments, buyers are expected to purchase an increasingly broad set of additional capabilities, including digital interaction routing, WEM, analytics, and customer journey management tools, among others. This points to a changing, but still healthy market for core CCaaS sales over that time frame.

Additionally, GenAI customer support revenue, defined as revenue associated with the spend associated with interactions that are handled (fully and partially) through GenAI-enabled self-serve (bots), is expected to grow at nearly a 40% CAGR pace, eclipsing CCaaS spend by 2029. This indicates a changing, but healthy market for core CCaaS and customer-service-related sales over that time frame.

The current set of CCaaS competitors are not the only vendors that recognize this opportunity. Gartner continues to see vendors from customer-service-related markets

beyond CCaaS beginning to encroach upon the space. Prime among these new competitors are the CRM CEC vendors, who recognize that the information — and context-rich interaction data that comes as a result of providing CCaaS services — will help unlock opportunities for building increasingly engaging and complete generative and agentic AI offerings. Others entering the market include digital customer service specialists and hyperscalers (some of whom are also CRM CEC providers). The increasing revenue opportunities, along with increased competition, point to a very dynamic future for CCaaS over the next five years and beyond.

⊕ Evaluation Criteria Definitions