Magic Quadrant
for Contact Center Infrastructure, Worldwide

As the global economy recovers, contact center investments are increasing, as they can improve customer satisfaction and reduce costs. Companies must evaluate vendors' technology and capabilities in relevant regions.

WHAT YOU NEED TO KNOW

The contact center infrastructure market has been showing a trend toward consolidation for several years, with the largest point of consolidation announced in December 2009, with Avaya's acquisition of Nortel's enterprise business. This combination results in Avaya now holding approximately half of the global market share for contact center infrastructure revenue and systems shipped. While some best-of-breed "point products" will remain relevant, customers are progressively moving to broader solutions from "cornerstone" vendors. Furthermore, enterprises are increasingly recognizing the potential synergies between their customer-facing contact center infrastructure and software solutions, with their current or planned investments in internal-facing unified communications architectures and must consider how these investment strategies can coexist and potentially share communication and collaboration components.

This research captures Gartner's view of the general state of the market at the time of publishing, and it must be noted that it is not intended as specific advice for any one user company's situation. Companies planning to acquire new or replacement contact center infrastructure should contact Gartner to discuss how this generalized model applies to their specific environment and needs.

MAGIC QUADRANT

Market Overview

The contact center infrastructure market is largely a mature market in North America and Western Europe, with most sales being expansions of replacements of existing systems, but is still an emerging technology space in many other geographies across the globe.

The market has traditionally been dominated by the leading vendors in the enterprise telephony space, although smaller players continue to find defendable market niches, either through low price, geographic or vertical market specialization, differentiating technologies or combinations of these. Contact center infrastructure solutions have traditionally been hardware-centric, but most vendors' solutions are now shipped as software that the customer can run on properly-configured commercial, off-the-shelf servers. The majority of shipped solutions are based on Internet standards, including TCP/Internet Protocol (IP) in telephony and Session Initiation Protocol (SIP), which enables the systems to more readily support geographically separate operations on a centrally-deployed system and provide for greater scale in the application platform.

Gartner®

The use of Internet standards also enables contact center functionality to be embedded into third-party applications, such as customer relationship management (CRM) or enterprise resource planning (ERP) systems. SIP also enables tighter integration within contact center vendors' portfolios of products, although the promise of inter-vendor interoperability continues to be difficult to achieve. SIP also promises to help to integrate to other enterprise communications applications, such as presence and conferencing – or alternatively, Extensible Messaging and Presence Protocol (XMPP) in the case of presence. This will enable contact centers to incorporate communications and collaboration more easily with subject matter experts from outside of contact center staff and helps to integrate the technology more tightly into enterprise unified communications (UC) strategies.

The market has been consolidating over time and incumbent vendors are looking to expand their solutions portfolios to incorporate additional capabilities that commonly play a role in contact center "ecosystems." These capabilities include interactive voice response (IVR), outbound dialers, workforce management, recording, e-learning, Web chat, e-mail response management, collaboration, analytics and workflow. This creates challenges to those that grow through acquisition or who develop these solutions as separate, point-solution offerings, in that a portfolio approach (rather than a more tightly integrated suite approach) results in an environment in which customers must manage and administer component systems separately.

Additionally, contact centers rely heavily on their reporting systems to make optimal use of agent resources and to ensure that customers receive consistent care across channels and locations. Separate reporting systems for each contributing system create challenges with coordination across all reporting systems and makes it difficult to perform analytics across multiple systems. Other vendors have either built their systems from inception or re-architected their solutions to incorporate these multiple functionalities in a more tightly integrated suite, leveraging a single administrative and management interface and a single, consolidated reporting environment. While these solutions originally targeted small and midsize contact centers, they are increasingly becoming viable solutions for contact center environments with more than 1,000 concurrent agents.

Figure 1. Magic Quadrant for Contact Center Infrastructure, Worldwide

Source: Gartner (February 2010)

As of February 2010
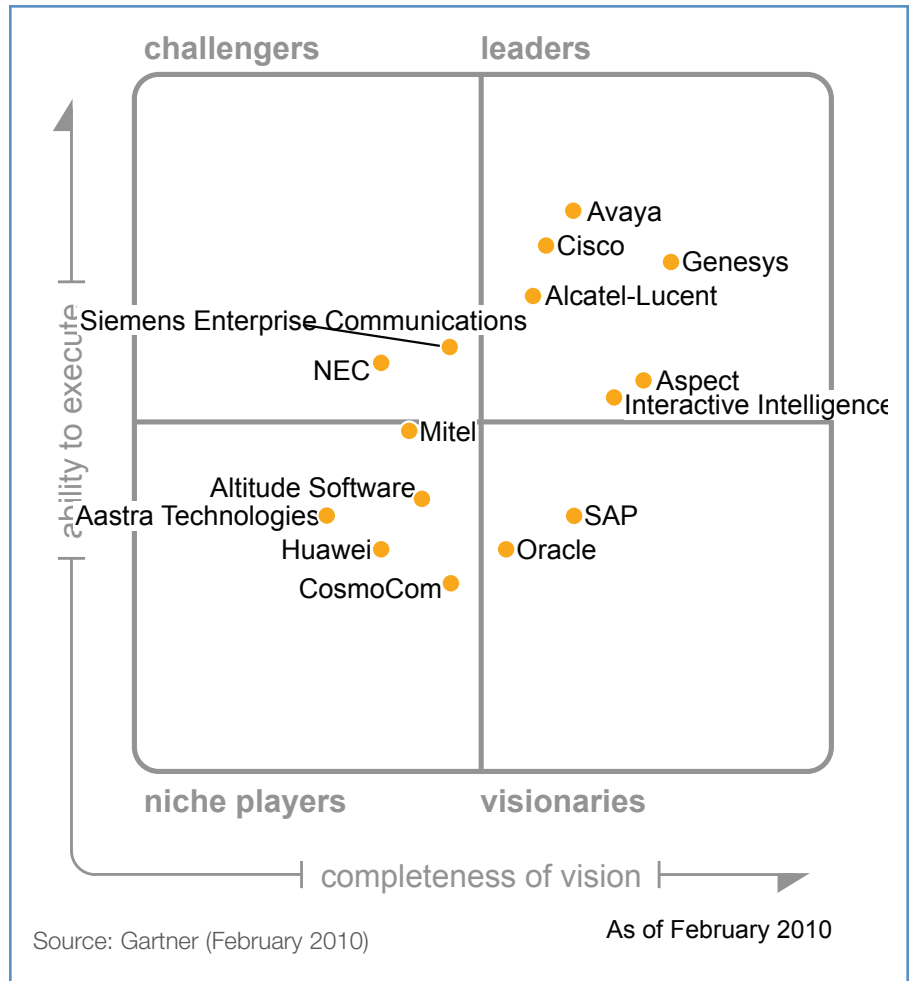
Many companies fitting a mainstream or conservative technology adoption profile have begun to embrace the use of multichannel customer communications, primarily in the form of adding e-mail response management and in some cases, Web chat functionality, to their environments. Meanwhile, those with more aggressive technology adoption profiles have begun to embrace rich presence to incorporate subject-matter experts directly into customer service scenarios. Technologies such as video and Web collaboration with customers, remain niche functionalities in contact center infrastructure, with limited commercial deployment. Regardless of a company's particular technology adoption profile, companies should review Gartner's "Hype Cycle for Contact Center Infrastructure, 2009" to help develop a road map for how new

technologies should be brought into their respective environments to address customer relationship strategies. In some cases, this may involve evaluating the ability of a system to provide a breadth of functionality, not all of which may be implemented at the time of the system's initial deployment.

With the global economic downturn in late 2008 that extended through 2009 and beyond, the global contact center market saw declines in revenues and shipments for its second consecutive year, following five years of continued growth. A decline was seen in all regions with the largest in North America, Western Europe and the Middle East and Africa. During the early and more dramatic phases of the economic downturn, many companies focused their contact center infrastructure and operation strategies on reducing IT and operational costs. This led to an increase in investments in infrastructure consolidation projects, as well as driving greater penetration of applications focused on staffing efficiency, including self-service, Web-based self-service, improved desktop tools and workforce management systems.

As the global economy showed signs of recovery in the latter stages of 2009, companies began to balance cost reduction strategies with a return to focusing on improving customer service and pursuing new revenues. In this environment, many of the same types of systems are leading investment trends, but deployments are making greater efforts to balance efficiency and effectiveness goals when designing solutions. The easing of the restraints placed on IT budgets earlier in 2009 has also resulted in increased deployments of speech-enabled applications, which can drive both cost reduction and customer service benefits through automation, but often had high project costs that made them unpalatable for many organizations.

Market Definition/Description

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

The interactions can be people-assisted or automated self-service, using IVR and speech recognition technologies, for example. These channels for interaction use both live agents and messaging technology and include voice, Web, e-mail, instant messaging, chat, video and mobile devices.

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

- Telephony infrastructure.

- Multimedia contact routing and prioritization engines.

- IVR and voice portals for self-service applications, including speech-enabled self-service.

- Outbound dialing/proactive contact.

- Virtual routing applications for multisite and work-at-home scenarios.

- Presence tools.

- Tools for integration with CRM software.

- Data mart and analytics systems.

- Computer-telephony integration (CTI)/Web service interfaces.

- E-mail response management.

- Web chat.

- Collaborative browsing.

- Knowledge-base self-service.

- Workforce optimization tools including workforce management, session recording and e-learning.

- Workflow routing and management.

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

Increasingly, contact center managers will wish to purchase much, or all, of their contact center infrastructure from a single source in the pursuit of easier integration. Therefore, leading contact center infrastructure vendors offer complete portfolios of solutions, comprising their own products and those of partners and other strategic suppliers. A fourth architectural approach, that of hosted, multi-tenant systems (also known as software as a service [SaaS]) is still an emerging alternative and not yet widely deployed in the market.

Inclusion and Exclusion Criteria

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

- Significant market share or, failing that, sufficient differentiation to obtain market presence.

- Sufficient sales and operational presence to support their market objectives.

- Demonstrable solutions in most of the contact center infrastructure portfolio areas defined earlier.

- Evidence of an ability to generate significant interest from leading client segments.

Added
No new vendors have been added to the Magic Quadrant this year.

Dropped
Nortel was removed from the Magic Quadrant, due to it being acquired by Avaya and is now evaluated as a part of the Avaya offering set.

Intervoice/Convergys was removed from the Magic Quadrant this year, as it did not meet the "market share and/or sufficient differentiation," nor the "ability to generate significant interest for leading client segments" inclusion criteria.

Evaluation Criteria

Ability to Execute
Gartner evaluates contact center infrastructure providers on the quality and efficacy of the processes, systems, methods and procedures that enable contact center performance to be competitive, efficient and effective and to positively affect revenue, retention and reputation. Ultimately, they are judged on their ability to capitalize on their vision.

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

Overall Viability (Business Unit, Financial, Strategy and Organization): This includes an assessment of the organization's financial health overall, the financial and practical success of the business unit and the likelihood of the business unit continuing to invest in the product, offer the product and advance state of the art practices in the organization's product portfolio.

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

Market Responsiveness and Track Record: The ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customers' needs evolve and market dynamics change. This criterion also considers a 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 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, promotions, 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. This includes the ways customers receive technical or account support and can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups and service-level agreements.

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

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	High
Overall Viability (Business Unit, Financial, Strategy, Organization)	High
Sales Execution/Pricing	Standard
Market Responsiveness and Track Record	Standard
Marketing Execution	Standard
Customer Experience	Standard
Operations	Standard
Source: Gartner (February 2010)	

Completeness of Vision
Gartner evaluates contact center infrastructure providers on their ability to articulate logical statements about the market's current and future direction, innovation, customer needs and competitive forces, and on how well this corresponds to Gartner's position. Ultimately, vendors are rated on their understanding of how market forces can be exploited to create opportunities for them and their clients.

Market Understanding: A vendor's ability to understand buyers' wants and needs and to translate that understanding 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 them with their added vision.

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

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

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

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

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

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

Geographic Strategy: A vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographic locations outside its native ("home") location, either directly or through partners, channels and subsidiaries as appropriate for that location and market.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	High
Marketing Strategy	Standard
Sales Strategy	Standard
Offering (Product) Strategy	High
Business Model	Standard
Vertical/Industry Strategy	Standard
Innovation	Standard
Geographic Strategy	Standard
Source: Gartner (February 2010)	

Leaders

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

Challengers

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

Visionaries

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

Niche Players

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

Vendor Strengths and Cautions

Aastra Technologies

Consider Solidus eCare when already committed to Aastra's MD110 or MX-One platforms, when users want telephony and suite-oriented contact center solutions from a single source and for those who need to integrate mobile phones into the solution.

Strengths

- Aastra's Solidus eCare platform's best fit is the small to midsize contact center, though it can scale much further. It provides multimedia contact functionality on Aastra's MD110 and MX-One platforms and is targeted to become the common contact routing offering across the company's various enterprise telephony offerings over the course of 2010.

- The company's Centergy Virtual Contact Center (CVCC) is a hosted offering aimed at North American companies of all sizes that want hosted contact center solutions based on their Clearspan platform.

- Aastra has a large installed base of telephony users around the world (albeit concentrated in Europe) following a number of acquisitions, including the 2008 acquisition of Ericsson's enterprise communications division.

Cautions

- Lack of previous investment by Ericsson in its contact center portfolio means Solidus eCare solutions continues to be missing key capabilities, such as predictive dialing, workforce optimization and VoiceXML for IVR development, as the company has focused its development efforts toward unifying its contact center solutions across the disparate set of telephony environments in its portfolio.

- Solidus eCare's penetration of Aastra's own PBX/IP-PBX installed base (which is fragmented resulting from a series of acquisitions) is limited and this product is not widely used outside of the company's enterprise telephony base.

- Solidus eCare and CVCC are separate development efforts, which limit the ability of channel to sell and deploy single-platform solutions in a hybrid "in-house and hosted" model.

- Limited sales channels for Solidus eCare mean that the market's awareness of this product is low.

- The company's limited presence in North America, the largest contact center market globally, as well as Latin America and Asia, hampers its ability to grow and makes it challenging for some multinational companies to deploy a global solution.

Alcatel-Lucent

Consider Alcatel-Lucent when looking for contact center functionality, ranging from basic to advanced, requiring tight integration to new and existing OmniPCX telephony infrastructure.

Strengths

- Alcatel-Lucent's OmniTouch contact center solutions sell well into the company's large installed base of OmniPCX telephony products across Europe, the Middle East and Africa (EMEA), Asia/Pacific and Latin America.

- By moving the sales and marketing functions of the company's highly-successful Genesys subsidiary into the same enterprise solutions division occupied by Alcatel-Lucent branded PBX and contact center solutions, the company should be able to reduce or eliminate confusion in customer and channel selection of its competing offering sets. This move enables the company to support companies with telephony platforms from multiple vendors better, by positioning OmniGenesys solutions in Alcatel-Lucent switching environments more easily and traditional Genesys solutions in locations with other vendors' telephony platforms.

- Alcatel-Lucent has a comprehensive offering of contact center solutions, ranging from "on demand communications solutions" and OmniTouch Contact Center Standard edition for smaller centers or those with more basic contact routing needs, to OmniTouch Contact Center Premium Edition and OmniGenesys Contact Center for larger environments for those with complex contact routing needs.

- Alcatel-Lucent has good "mind share" in Western Europe, thanks to strong channel relationships with network system integrators and network service providers for sales and integration.

- The OmniTouch portfolio has strong multichannel contact center functionality when used with Alcatel-Lucent OmniPCX telephony infrastructure.

Cautions

- OmniTouch contact center solutions only work in OmniPCX telephony environments.

- Alcatel-Lucent's strategy to leverage integration between service provider voice and data switching solutions and enterprise contact center routing solutions has met with little traction when attempted by other vendors. It remains questionable whether the company's research and development efforts in this area will produce solutions with actual market demand or simply distract resources from developing and delivering more relevant solutions.

- Alcatel-Lucent has significantly fewer large reference customers for its OmniTouch solutions than other leading vendors for their principal offerings.

- The company's limited presence in North America, the largest contact center market globally, hampers its ability to grow and makes it challenging for some multinational companies to deploy a global solution.

- Despite increasing its investment in direct-touch sales, Alcatel-Lucent still relies heavily on channel partners that also sell competitors' products. Therefore, it is less able to control the sale of its products.

Altitude Software

Consider Altitude uCI if you require a suite-based solution set and you have access to certified integrators on Altitude uCI. Altitude solutions should also be considered if you require multivendor telephony integration or are replacing your incumbent telephony infrastructure vendor and want to separate the timing of your contact center and PBX decisions.

Strengths

- Altitude uCI is a software-based contact center application suite offering broad functionality and interoperability with PBX and IP-PBX infrastructure from leading vendors. Altitude also offers its own SIP-based vBox, which uses the Asterisk open-source communications platform.

- Altitude uCI offers a competitively priced range of applications, including multichannel inbound and outbound capabilities, voice self-service, call recording and workforce optimization, with particular strengths in scripting, knowledge base and integrated desktop tools.

- Altitude market presence is primarily concentrated in Europe and Latin America (primarily in Brazil), particularly among contact center business process outsourcers.

Cautions

- Altitude has limited market presence and awareness globally and lacks the financial resources for rapidly increasing awareness of its brand.

- Altitude's ability to provide solutions to multinational companies outside the European and Latin American markets is limited.

- Altitude's increasing focus on meeting the needs of the outsourcing market distracts the company from more aggressively targeting enterprise contact center environments.

Aspect

Consider Aspect when looking for a unified contact center application suite for midsize to large size implementations, including several best-of-breed applications. Additionally, consider Aspect when needing to integrate with multiple PBX/IP telephony environments or when separating the timing of contact center and PBX decisions.

Strengths

- The unified architecture of Aspect's Unified IP products provides common application development, management and reporting tools. They incorporate the company's best-of-breed technology, including call and multimedia routing, an IVR/voice portal, outbound dialing and workforce management. The solution can also be integrated with the company's "signature" (legacy) contact center platforms.

- Aspect's partnership with Microsoft, based on Microsoft's equity stake in the company, provides a marketing advantage when selling to Microsoft-centric companies. Aspect continues to migrate its product offering to become more tightly integrated with Microsoft solutions and to present a Microsoft-like "look and feel" in its presentation to contact center agents, managers and administrators.

- Aspect's considerable experience in contact center products and markets can be helpful to companies with complex requirements. Aspect also has good global reach for sales and support.

Cautions

- Aspect traditionally charges premium pricing for ongoing maintenance services, but its services team gets varied reviews from Gartner clients. Aspect customers and prospects must evaluate the impact of this pricing on the solution's total cost of ownership and check references to validate that the service team's skill level is commensurate with the services pricing.

- The company lacks an enterprise PBX/IP-PBX installed base of its own into which to sell its products. As such and in the light of the lack of "greenfield" opportunities in the larger North American and Western European markets, Aspect must attempt to sell into the installed bases of other vendors, which can be a challenging task.

- Aspect's financial performance is solid, but the company is not growing its installed base aggressively. In an industry undergoing consolidation, this may affect its revenue streams in the long term.

Avaya

Following Avaya's acquisition of Nortel in December 2009 and the recent product road map announcement, consider the heritage Avaya CC Elite or multichannel interaction center portfolio, which includes several best-of-breed applications for contact center environments with complex customer service requirements, particularly when using heritage Avaya telephony solutions. Consider heritage Nortel CC7 product suites in environments looking for low and mid-level complexity solutions, particularly those using heritage Nortel telephony solutions.

Strengths

- With the acquisition of Nortel's contact center product portfolio, Avaya now can offer a more robust mid-market solution to replace its former Contact Center Express solution, while continuing to sell heritage Avaya CC Elite solutions into larger and more complex contact center environments.

- Avaya's announced contact center product road map provides a relatively smooth migration path for both heritage Nortel and heritage Avaya customers, evolving to a single, Next-Generation Contact Center (NGCC) (a provisional name used by the company) for both legacy and net-new customers. Aura Session Manager will facilitate integration of heterogeneous vendor environments.

- Avaya has been aggressively migrating to a channel-focused sales strategy from a predominantly direct sales approach over the past 18 months. The acquisition of Nortel greatly expands Avaya's channel coverage globally, as there was limited channel overlap.

- With the acquisition of Nortel, Avaya now holds nearly 50% market share in contact center routing, providing the stability associated with strong product and services revenues and a large installed base into which additional products and services can be sold.

Cautions

- Both Avaya and Nortel customers and prospects must ensure that they are sufficiently confident with the company's announced product road map which will eventually be based on a combination of the heritage Nortel open systems routing platform in combination with Avaya's Aura Session Manager and incorporating much of Avaya's routing strategies – and understand the migration implications for their environments. Customers and prospects should compare these with competitive solutions and match them to their own contact center road maps.

- Integration of competing product offerings inherently brings challenges to sales, marketing and product development efforts and can result in challenges in selling and supporting existing products, as well as bringing new ones to market. Avaya customers and prospects should expect some hiccups during the early integration stages of the two companies' solutions and should work with Avaya to ensure that such instances are corrected quickly and lessen in frequency over time.

- Avaya has expanded its channel coverage with the acquisition of Nortel, but many heritage Nortel channel partners lack contact center applications expertise. Customers and prospects must check references from the combined base of channel partners to ensure that the partner has a track record for installing and supporting solutions that match their own environment.

- Gartner is already hearing reports of channel conflict and unrest in accounts where Avaya's and Nortel's channel partners have both had presence. Customers must aggressively lobby Avaya directly to ensure that their needs and wishes are given precedence over Avaya's efforts to placate channel partners.

Cisco

Companies that are committed to Cisco's Unified Communications Manager or that want an end-to-end Cisco infrastructure, should consider Cisco's contact center offerings.

Strengths

- Cisco's Unified Contact Center portfolio supports a broad set of functionality, including call and multimedia routing, network-level routing, IVR/voice portal and outbound dialing.

- Cisco's strong brand recognition and respect among IT decision makers and influencers and its broad global reach has enabled it to grow market share, often at the expense of more established players in the market.

- Several of Cisco's key channel partners have strong contact center consulting and system integration skills to deliver highly customized and complex contact center solutions.

Cautions

- Cisco's Contact Center Enterprise and Express products sell strictly into environments using the company's data communications network and telephony solutions. Cisco's Unified Intelligent Contact Management Enterprise offering can support integration to third-party telephony environments, but is frequently too expensive and under-featured for enterprise contact center environments and is typically installed as a "stepping stone" to the company's traditional enterprise contact center products.

- While Cisco's Unified Contact Center Express product supports a tightly-bundled application suite, the company does not offer an all-in-one contact center applications suite capable of scaling to large enterprise sizes.

- The company continues to close the "feature gap" between itself and its competitors, but Cisco contact center applications are less feature-rich than those of vendors with a long history of selling contact centers.

CosmoCom

Consider CosmoCom when looking to support large, multisite, virtualized contact centers, as well as shared centralized infrastructure, while still allowing management control at departmental or group level.

Strengths

- CosmoCom's CosmoCall Universe comprises a broad suite of highly scalable and fully featured contact center infrastructure applications, including call and multimedia routing, contact recording and outbound dialing.

- CosmoCom's unified contact center application suite uses Web services and provides a common set of application development, management and reporting tools for a wide range of applications.

- CosmoCom has strong scalability and multi-tenant capabilities using multilevel permissions-based partitioning and unified graphical user interface-based tools for the development and management of contact center applications.

- CosmoCom's offerings particularly suit large-scale, multi-tenant enterprises, hosted or service provider environments. The company's strongest regional presence is in the EMEA region, particularly among telcos and a growing presence in North America and Asia/Pacific.

Cautions

- CosmoCom's focus on multi-tenant solutions, hosting and service provider deployments limits enterprise decision makers' awareness of its brand.

- The company's products can scale down to midsize contact center deployments, but CosmoCall typically sells primarily into large scale multi-tenant environments, such as cable companies, for example. Expect CosmoCom's solutions to be tailored more toward multi-tenant environments than to traditional enterprise needs.

Genesys

Consider Genesys when looking to support large, complex contact centers including those that require significant customization to address differentiated customer service needs. Genesys should also be considered when there is a requirement to integrate with multiple PBX/IP telephony environments or when separating contact center and PBX decisions.

Strengths

• Genesys's Customer Interaction Management Platform and other components of its contact center portfolio support a broad suite of highly scalable and fully-featured contact center infrastructure applications. These include call and multimedia routing, network-level routing, voice response, contact recording and outbound dialing, workforce management and analytics.

• Genesys can provide strong consulting and system integration services either directly or through its professional services partners.

• The company has a strong vision for decoupling contact center applications from telephony infrastructure and for extending contact center capabilities into unified communications environments and enterprise workflow beyond the contact center.

• Genesys has a good ability to support global customers. As a subsidiary of Alcatel-Lucent, it has stronger financial backing than do most other solutions that are not linked to the sale of a particular vendor's telephony infrastructure.

Cautions

• A traditional strength of Genesys has been its ability to operate relatively independently of its parent company, Alcatel-Lucent. This afforded Genesys the independence to sell aggressively into competing vendors' enterprise telephony environments. The announcement in January 2010 by Genesys that its sales and marketing functions will be integrated into Alcalel-Lucent's Enterprise Solutions division, places vendor independence at risk, as the Genesys organization is likely to lose its distinctive competencies over time and become a single, rationalized Alcatel-Lucent solution.

• Genesys solutions are often more costly and customized to a user's particular environment than those of competitors and are often not cost-effective, as well as being too complex to deploy and manage for small and midsize contact center deployments.

• Genesys has been slower than some vendors to evolve its products toward a unified contact center architecture that provides a common set of application development, management and reporting tools across a wide range of contact center applications.

Huawei

Consider Huawei for deployments in China and in geographies where its carrier and large-enterprise business resources are significant enough to provide capable support, either directly or through channel partners.

Strengths

• Huawei offers a broad suite of contact center offerings with which telcos can host solutions for enterprises. They are founded on the company's UAP (an IP-based/enabled PBX with ACD), ICD (a CTI/IVR middleware and intelligent call distribution platform), ISE (an integrative information system), CSP (a customer service platform), C&C08 (a traditional call center solution based on TDM) and IPCC (an IP contact center solution).

• Huawei's IP switching solutions (UAP8100 for carriers and large enterprises, and UAP3300/2100 and UAP6600 for midsize enterprises) support virtual call center, network call center, Web-enabled contact center and multimedia access channels in contact center operations.

• Huawei has a large installed base of users in China, particularly among telephony service providers, including multiple 10,000 seat installations. These platforms are also leveraged to provide solutions on a SaaS basis for smaller companies.

• Huawei's highly-scalable and cost-effective solutions enable the company to continue to grow its sales to carriers in Asia, Latin America, Eastern Europe and Africa. This will increasingly internationalize its contact center solutions.

Cautions

• Huawei has limited ability to provide enterprise contact center solutions outside of China and South Africa. This limits its ability to support global customers.

• Huawei is growing its enterprise business, but its focus on meeting the needs of the telephony service provider market distracts the company from targeting enterprise contact center environments more aggressively.

Interactive Intelligence

Consider Interactive Intelligence when looking for an all-in-one suite of tightly integrated contact center applications across a wide range of scalability requirements. This includes environments that contain multiple PBX and/or IP-PBX vendors, or when you want to separate timing of their contact center and PBX decisions.

Strengths

• Interactive Intelligence's Customer Interaction Center contact center suite uses Web services and provides a common set of application development, management and reporting tools across a wide range of applications.

- The company has expanded the scalability, security and manageability of its solutions, enabling it to sell successfully into large enterprise contact center environments. It has also added an Interactive SIP station to lower handset costs and simplify deployments inside existing TDM and IP environments.

- The company has increased its direct sales and support organization, as well as its presence with major system integrators, to help address the needs of large and multinational customers.

- Customer Interaction Center's efficient use of server resources and consistent administrative and management tools across applications makes the system particularly appealing to IT decision makers.

Cautions

- Interactive Intelligence lacks brand recognition outside North America and particularly in large enterprise contact center deployments. However, brand awareness within North America is steadily increasing.

- Despite making investments in its channel program to support enterprises outside North America, the company is unable to match the global coverage provided by some of its larger competitors. Companies should evaluate the ability of Interactive Intelligence and its channel partners to meet their needs in relevant markets.

- Some of Interactive Intelligence's contact center applications are less feature-rich than competitive best-of-breed offerings.

- Not all of Interactive Intelligence's channel partners are strong in contact center environments. Prospects should check channel partner references for environments that match their scalability and complexity needs.

Mitel

Consider Mitel when looking for contact center solutions for small and midsize deployments associated with Mitel 3300 telephony environments.

Strengths

- Mitel's contact center offering supports a broad suite of contact center infrastructure applications, including call and multimedia routing, voice response, outbound dialing, call recording and workforce management.

- Mitel has a strong network of channel partners, particularly for small and midsize enterprises in North America.

- Mitel offers strong integration with Microsoft communications products and sometimes sells jointly with Microsoft in midsize contact center environments.

Cautions

- Mitel has limited ability to support large contact center environments and customers with multinational requirements. The company has limited market presence and awareness globally and lacks the financial resources for rapidly increasing awareness of its brand.

- Not all of Mitel's channel partners are skilled in contact center deployments. Prospective customers should check local references.

- Mitel's contact center sales are primarily limited to Mitel telephony environments.

NEC

Consider NEC when using or evaluating NEC telephony infrastructure and where contact center size and sophistication needs are stable and unlikely to require migration across product lines within the NEC portfolio.

Strengths

- NEC's high-end CCDesign offering provides a unified suite of contact center capabilities and integrates tightly with the company's Unified Communications for Enterprise offering.

- NEC has a large installed base of PBXs and contact centers to which to sell additional contact center products and services.

- NEC's recent gains in telephony sales and Microsoft integration may translate into stronger contact center sales.

Cautions

- Multiple contact routing products for different company sizes and geographies limit NEC's ability to support multinational companies with a cohesive contact center product set worldwide.

- NEC's contact center sales are primarily limited to NEC telephony environments.

- NEC operates in particular country markets in Asia and North America but has a low profile in Europe and elsewhere.

Oracle

Companies committed to Oracle's Siebel CRM software should consider Contact Center Anywhere when looking for highly scalable, multisite and/or multitenant contact center solutions.

Strengths

- Oracle's Contact Center Anywhere offers a tightly integrated all-in-one contact center applications suite based on Web services and providing a common set of application development, management and reporting tools across a wide range of applications.

- Oracle has a strong vision for extending contact center functionality deeply into Oracle CRM applications, including both premises-based and on-demand offerings.

- Oracle has good scalability and multitenant capabilities, making it a good fit for Oracle CRM customers looking to consolidate their contact center infrastructure even if they are not centralizing their contact center operations.

Cautions

- Contact Center Anywhere now sells primarily into the Oracle CRM software customer base, limiting the ability to meet the needs of non-Oracle CRM companies.

- Despite the Oracle's global reach for CRM software deployments, its contact center infrastructure offerings have not been aggressively adopted by the company's sales and support organizations. As such, Oracle has limited ability to provide contact center infrastructure solutions and support for global deployments.

- In many customer environments, purchasing decisions about contact center infrastructure and enterprise applications software are made by separate groups – particularly in large enterprises. This can increase the complexity of the selling environment within accounts and limit the long-term benefits of Oracle's integrated solution.

SAP

Consider SAP Business Communications Management (SAP BCM) when looking for highly-scalable and/or multitenant all-in-one application suites solutions, especially when your organization is committed to SAP enterprise applications.

Strengths

- SAP BCM is an all-in-one software suite that includes multichannel inbound, outbound, IVR, call-recording and quality-monitoring capabilities, and strong integration with mobile devices.

- BCM can be run as a stand-alone solution or integrated with other SAP enterprise software products and supports interoperability with PBX and IP-PBX infrastructure from leading vendors.

- SAP is integrating the communication functions inherent in its contact center offering into its broader set of enterprise applications to create a unified-communications-style offering.

- BCM is gaining market acceptance beyond its traditional stronghold in Scandinavian countries, increasing SAP's ability and experience in supporting the solution for global customers.

Cautions

- BCM represents a very small portion of SAP's overall revenue stream and it continues to be challenging for the BCM sales and marketing team to gain and maintain awareness among SAP's sales force to mine the large and lucrative SAP enterprise software customer base more easily. This will make it harder for the BCM group to grow the business and show the financial contributions that will gain it more access to SAP's R&D budgets.

- BCM lacks brand awareness in the contact center infrastructure space, making it more challenging to penetrate enterprises that do not have an existing SAP investment. This further challenges the BCM group within SAP to grow the business in a way that will accelerate SAP's investment in growing that portion of the business.

- In many customer environments, purchasing decisions for contact center infrastructure and enterprise applications software are made by separate groups – particularly in large enterprises. This can increase the complexity of the selling environment within accounts and limit the long-term benefits of SAP's integrated solution.

Siemens Enterprise Communications

Consider Siemens when looking for well-featured contact center applications running in existing or potential Siemens telephony environments.

Strengths

- Siemens Enterprise Communications (SEC) has a good vision for extending its OpenScape Contact Center (OSCC) capabilities into unified communications environments.

- Since the announcement of the partnership between The Gores Group and Siemens AG, in which the former took a controlling interest in Siemens, the company has shown increased product development and sales and marketing focus on OSCC and the contact center business. This includes integrating the outbound dialer products from SER Solutions, another contact center company owned by The Gores Group. Siemens now sells OSCC into many environments into which it previously would have re-sold Genesys solutions to provide complex contact center solutions.

- Siemens has strongly pursued openness through its development of a service-oriented architecture environment. Siemens also employs an all-software approach, including the underlying OpenScape Voice switching/softswitch environment.

Cautions

- Despite Siemens' recent re-focusing on its contact center business, the company still struggles to overcome a legacy association with technically strong, but under-marketed solutions. This continues to result in Siemens sometimes not even being considered for a number of large contact center opportunities – even within its own installed base of telephony users.

- The company sells primarily to Siemens PBX/IP-PBX environments.

Vendors Added or Dropped

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

Evaluation Criteria Definitions

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and 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 Web site, 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.