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Magic Quadrant for Contact Center Infrastructure, Worldwide

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The contact center infrastructure market continues to consolidate as users shift from best-of-breed "point products" to broader solutions from "cornerstone" vendors. Prospective customers must evaluate vendors in terms of their technology and capabilities in relevant geographies.

WHAT YOU NEED TO KNOW

The contact center infrastructure market continues to consolidate as vendors seek to broaden their product and service offerings in response to customers' desire to rationalize the number of vendors in their environments. While some best-of-breed "point products" will remain relevant, customers are increasingly moving to broader solutions from "cornerstone" vendors.

Gartner has consolidated its three regional Magic Quadrants for contact center infrastructure in North America, Europe, the Middle East and Africa (EMEA), and Asia/Pacific into this single worldwide document. However, it is vital that readers evaluate each vendor's offerings in terms of their current and future technological "fit" and capabilities in relevant geographies, because not all the suppliers in this Magic Quadrant are strong in every technological and geographic area.

MAGIC QUADRANT

Figure 1. Magic Quadrant for Contact Center Infrastructure, Worldwide

Source: Gartner (October 2008)

Market Overview

The global market for contact center infrastructure has grown steadily in recent years (see "Forecast: Contact Centers, Worldwide, 2002-2011"). Agent shipments in the larger and more mature markets of North America and Western Europe are mainly driven by replacements of existing systems, while shipments in other emerging regions are driven by sales of new systems.

The contact center market has traditionally been dominated by enterprise telephony vendors, which sell contact center infrastructure as an extension of their telephony architecture. However, as telephony and contact center functionality becomes more software-based, it becomes less tied to telephony infrastructure. As the telephony-centric "call center" continues to evolve into a multimedia and process-centric "contact center," the contact center infrastructure market is becoming increasingly open to new entrants — some focusing on technology and cost differences, and others offering contact center infrastructure as extensions of ancillary products and services such as enterprise software applications and business process outsourcing (BPO). Over time, Gartner sees the enterprise communications infrastructure market, including contact centers, evolving from stand-alone systems ("point products") toward tightly integrated functionality with interfaces embedded within other enterprise applications. This evolution will present many challenges to traditional telephony vendors.

Many enterprises are migrating, or planning to migrate, their telephony infrastructure from traditional circuit-switched technology to newer Internet Protocol (IP)-based systems. This migration often creates opportunities to re-evaluate contact center operations and the infrastructures that support them. Incumbent telephony vendors often form the "path of least resistance" for companies planning to acquire new or refresh existing contact center infrastructure, particularly in single-site deployments or where there is a consistent telephony provider across multiple sites. However, in many environments, contact center infrastructure decision makers are finding that alternative providers can offer cost, capability and architectural strengths that their incumbents cannot match. Also, in some cases, these decision makers are specifically looking to decouple their contact center infrastructure technology from their enterprise telephony technology, especially where the telephony decision is likely to be made separately from the contact center infrastructure decision.

Companies fitting the "early adopter" technology adoption profile (see "Understanding Gartner's Hype Cycles, 2008") are examining innovations in the areas of Session Initiation Protocol (SIP), service-oriented architecture (SOA), mobility, rich presence and collaboration technologies. The benefits of these approaches include the extension of contact center functionality into customer relationship management (CRM) applications; incorporation of CRM data and real-time queue status information to dynamically adjust contact routing and call treatment; and extension of the reach of contact center functionality to nontraditional agents such as second- and third-level support staff. But SIP-based solutions have yet to fulfill their promise of allowing organizations to use, at low cost, contact center solutions from one vendor within another vendor's SIP-based telephony infrastructure.

Companies fitting the "mainstream" and "late adopter" technology adoption profiles are increasingly considering virtual (distributed) contact centers, centralized infrastructure models (supporting both companywide initiatives and operationally independent, multitenant deployments using shared infrastructure resources), Web- and speech-integrated voice portals, and hosted and managed deployment models in order to balance cost-reduction and improved-service initiatives.

In addition to the core features and functions of vendors' solutions, key criteria used by enterprises to evaluate contact center vendors and technologies include:

- Vendor and channel-partner service and support capabilities.
- CRM integration skills.
- Vendor and channel-partner reference sites.
- Annual system operating costs.

- Ease of integration with other systems.

Market Definition/Description

Gartner defines contact center infrastructure as the products (equipment, software and services) needed to operate call and contact centers. This type of infrastructure is used by customer and employee service and support centers, inbound and outbound telemarketing services, help-desk services, government-operated support centers, and other types of structured communications operation. The interactions can be human-assisted or automated self-service, using interactive voice response (IVR) and speech recognition technologies, for example. These channels for interaction use both live agents and messaging technology, and include voice, Web, e-mail, instant messaging, chat, video and mobile devices.

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

- Telephony infrastructure.
- Multimedia contact routing and prioritization engines.
- Speech-enabled self-service applications for IVR and voice portals.
- 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.
- Optimization tools for workforce management, session recording and e-learning, among other things.

Contact centers require a wide range of functions, architectures, features and services. 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 as 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. Therefore, leading contact center infrastructure vendors offer a complete portfolio of solutions comprising their own products and those of partners and other strategic suppliers.

Inclusion and Exclusion Criteria

To appear in this Magic Quadrant, vendors had to show all of 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 this year, although not all the vendors represented in this worldwide Magic Quadrant appeared in all three of the previous regional documents.

Intervoice, previously listed in "Magic Quadrant for Contact Center Infrastructure, North America, 2007," was acquired by Convergys in September 2008. It is now shown as Intervoice/Convergys.

Dropped

ComputerTalk, Syntellect and Vocalcom, all of which appeared in at least one of the regional Magic Quadrants, are not included in the worldwide Magic Quadrant proper because of their low global profiles as measured by analyst inquiries. They do, however, receive "honorable mentions" in Note 1. NEC Philips, which appeared in "Magic Quadrant for Contact Center Infrastructure, EMEA, 2007," is now shown as NEC.

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 overall organization's financial health, 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 the state of the art in the organization's product portfolio.

Sales Execution/Pricing: The vendor or channel 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: 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 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 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. It 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

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: The 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 those wants and needs with their added vision.

Marketing Strategy: A clear, differentiated set of messages communicated consistently throughout the organization and externalized through a Web site, 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: The 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: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical markets.

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

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of 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

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. Overall, however, 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

Strengths

- Aastra's Solidus eCare platform scales from small to large contact centers, providing multimedia contact functionality on Aastra's MD110 and MX-One platforms. It is Aastra's main contact center offering, following the acquisition of Ericsson's enterprise telephony communications business.
- The recently added Centergy Virtual Contact Center (CVCC) is a hosted offering aimed at North American companies of all sizes that desire hosted contact center solutions.
- Aastra has a large installed base of telephony users around the world, following a number of acquisitions, most recently of Ericsson's enterprise communications division.
- Solidus eCare is a good fit for existing users of Aastra's MX-One platform who want telephony and less-complex contact center solutions from a single source, and who need to integrate mobile phones into the solution. Companies committed to Aastra for contact center technology can expect Solidus eCare to be compatible with the Aastra Clearspan and Aastra 5000 platforms in 2009.

Cautions

- Lack of investment by Ericsson in its contact center portfolio means Solidus eCare solutions are missing key capabilities such as VoiceXML, predictive dialing and workforce optimization.
- Solidus eCare's penetration of Aastra's own PBX/IP-PBX installed base is limited, and this product is not widely used outside stand-alone contact center solutions.
- Solidus eCare and CVCC are separate development efforts, which limits channels' ability 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.

Alcatel-Lucent

Strengths

- When selling its OmniTouch solutions, Alcatel-Lucent capitalizes on a large installed base of OmniPCX telephony products across Asia/Pacific, EMEA and Latin America.
- The Enterprise Solutions division of Alcatel-Lucent's Enterprise Business Group has positioned itself well in relation to the company's Genesys subsidiary, which wins business from enterprises that use telephony products from multiple vendors.
- Alcatel-Lucent has a comprehensive range of contact center solutions, including OmniTouch Contact Center Premium Edition and OmniGenesys Contact Center.
- Alcatel-Lucent has good "mind share," 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 in support of new and existing Alcatel-Lucent OmniPCX telephony infrastructure.

Cautions

- OmniTouch contact center solutions only work in OmniPCX telephony environments.
- Despite its best efforts, Alcatel-Lucent's role in relation to Genesys remains competitive in some situations. This can create a challenge for enterprises and sales channels as to which offering to select.
- Alcatel-Lucent has significantly fewer large reference customers than other leading vendors.
- Alcatel-Lucent has very little presence in the North American enterprise market. This limits its ability to win business from organizations based in North America.
- Despite increasing its investment in direct-touch sales, Alcatel-Lucent still relies heavily on channel partners that also sell competitors' products. It is, therefore, less able to control the sale of its products.

Altitude Software

Strengths

- Altitude uCI is a software contact center application suite that operates on top of 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 has a strong market presence in southern Europe and Latin America.
- Altitude uCI is a good fit if you have a multivendor environment, you require a suite-based approach, and you have access to certified integrators on Altitude uCI. This also applies to organizations considering replacing their incumbent telephony infrastructure vendor and that want the flexibility to migrate their contact center investments from one vendor and/or technology environment to another.

Cautions

- Altitude is a small company on the world stage, with limited marketing resources for increasing awareness of its brand.
- Altitude's ability to provide solutions to multinational companies outside the Iberian and Latin American markets is limited.
- Altitude's increasing focus on meeting the needs of the outsourcing market is good for outsourcers but limits the company's appeal in other vertical markets.

Aspect

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, and can support similar capabilities for legacy Aspect and Rockwell offerings.
- 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's acquisition of BlueNote Networks gives it extra systems and tools with which to deliver unified communications solutions outside traditional contact center operations; it also provides an additional point of entry into the enterprise business.
- 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.
- Consider Aspect when looking for a unified contact center application suite for midsize implementations or for a highly scalable contact center suite, including several best-of-breed applications, for large contact center environments — particularly when you need to integrate with multiple PBX/IP telephony environments or want to separate the timelines for contact center and PBX decisions.

Cautions

- Prospective customers must evaluate and feel comfortable with Aspect's road map to normalize its multiple automatic call distribution (ACD) and dialer product lines.
- So far, sales of Aspect's Unified IP suite have been primarily for outbound-intensive deployments. Companies considering Unified IP for inbound-intensive environments should request appropriate references.
- 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

Strengths

- Avaya's Interaction Solutions, Performance Solutions and Mid-Market Solutions form a broad portfolio of fully-featured contact center infrastructure and applications, including call and multimedia routing, an IVR/voice portal and outbound dialing.
- Avaya has a broad global reach for sales and support, and a strong market share worldwide.
- Having been wholly acquired and taken private by the venture capitalist companies Silver Lake (see Note 2) and TPG Capital, Avaya is determinedly realigning its organization to be more channel-friendly, by, among other things, streamlining product offerings and investing in global services capabilities.

- The company has rationalized its direct and indirect channel sales efforts to improve support for indirect sales. This has greatly reduced instances of channel conflict.
- Consider Avaya when looking for a highly scalable and resilient contact center suite that includes several best-of-breed applications, particularly when using, or considering using, Avaya telephony environments.

Cautions

- Avaya has been slower than some vendors to evolve its product set toward a unified contact center architecture that provides a common set of application development, management and reporting tools across a wide range of applications.
- Systems typically sell only to existing Avaya PBX and IP telephony customers. The pricing structure for the associated licenses and maintenance is complicated.
- The increased rate of change within Avaya following its acquisition by Silver Lake and TPG Capital increases the volatility of Avaya's offerings as the company continues to review which should be dropped and which evolved (and the pace of that evolution). Despite the company's history of supporting legacy products, existing customers and prospective buyers must evaluate Avaya's plans to evolve its offerings and be comfortable that Avaya's short- and long-term vision suits their requirements.

Cisco

Strengths

- Cisco's Unified Contact Center represents a broad product portfolio, including call and multimedia routing, network-level routing, IVR/voice portal and outbound dialing. It ties Cisco's contact center products to its unified communications offerings.
- Cisco has strong brand recognition and respect among IT decision makers and influencers. It also has a broad global reach and a growing market share worldwide.
- Cisco's key channel partners have strong contact center consulting and system integration skills.
- Consider Cisco when looking to purchase network, telephony and contact center infrastructure and applications from a single vendor, and when your company is committed to Cisco Unified Communications Manager or wants an end-to-end Cisco infrastructure.

Cautions

- Cisco's agent-level routing capability is not proven to work with communications infrastructure from third parties.
- Cisco's call center portfolio includes several acquired products, which it has been slow to integrate into a suite with a common set of application development, management and reporting tools.
- Some Cisco applications are less feature-rich than those of vendors with a long history of selling contact centers.

CosmoCom

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 was an early provider of unified contact center application suites that use Web services and provide a common set of application development, management and reporting tools for a wide range of applications.
- CosmoCom has strong scalability and multitenant capabilities using multilevel permissions-based partitioning and unified graphical user interface-based tools for the development and management of contact center applications.
- 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.

Cautions

- CosmoCom's focus on hosting and service provider deployments limits enterprise decision makers' awareness of its brand. Gartner clients rarely ask about CosmoCom by name.
- CosmoCom Universe lacks native support for TDM PBX infrastructure. When considering CosmoCom, prospective customers operating TDM-only PBX infrastructure must factor in the additional cost and complexity of media gateways.

Genesys

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.
- Strong professional services capabilities are provided either by Genesys directly or though its system integration partners.
- This 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 strong financial backing.
- Consider Genesys when looking to support large, complex contact centers. Genesys may also be a good fit for companies that use multiple telephony vendors, or that are considering replacing one or more incumbent telephony systems and want the flexibility to migrate their contact center investments from their present telephony environment to one from another vendor.

Cautions

- 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.
- Genesys's solutions are often more costly than those of competitors.
- The company's offerings are not cost-effective for small and midsize contact center deployments. Other vendors' solutions, including Alcatel-Lucent's Genesys-based OmniTouch Contact Center Premium Edition, are more cost-effective for these contact centers.
- Despite Genesys's aggressive marketing claims to the contrary, few companies deploying Genesys SIP Server (unlike its traditional CTI-based solution) can reuse their existing IP telephony infrastructure. This forces duplication or earlier-than-planned replacement of some telephony elements. Companies considering Genesys SIP Server must carefully evaluate its potential impact on their existing investments.

Huawei

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 TopEng UAP (an IP-based/enabled PBX with ACD), TopEng ICD (a CTI/IVR middleware and intelligent call distribution platform), TopEng ISE (an integrative information system), TopEng CSP (a customer service platform), C&C08 (a traditional call center solution based on TDM) and TopEng IPCC (an IP contact center solution).
- Huawei's IP switching solutions (UAP8100 for carriers and large enterprises, and UAP3300/2100 for midsize enterprises) support virtual call center, network call center, Web-enabled contact center and multimedia access channels in contact center operations.
- Huawei has many users for its telephony products and does contact center business with Chinese carriers that use Centrex services in order to compete aggressively in telephony markets.
- Huawei's growing sales to carriers in Asia, Latin America, Eastern Europe and Africa will increasingly internationalize its contact center solutions.
- Consider Huawei for deployments in China and in any international markets where its carrier and large-enterprise business is significant enough to provide capable support, either directly or through channel partners.

Cautions

- Huawei has limited ability to provide enterprise contact center solutions outside China. This limits its ability to support global customers.
- Huawei has been slower than other vendors to evolve its products toward a unified architecture that provides a common set of application development, management and reporting tools across a range of applications. However, Huawei is a rapid follower.

- Huawei lacks some of the sophisticated contact center applications available from other vendors. But it is experienced in installations with large numbers of agents and heavy traffic.

Interactive Intelligence

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.
- It has a good installed base in small and midsize contact centers, particularly in North America, and an increasing number of deployments in large-enterprise contact center environments.
- The company has increased its direct sales and support organization to help address the needs of large and multinational customers.
- 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 timelines for contact center and PBX decisions.

Cautions

- Interactive Intelligence lacks brand recognition outside North America and particularly in large-enterprise contact center deployments.
- The company has a limited channel program to support enterprises outside North America. Companies should evaluate the ability of Interactive Intelligence and its channel partners to meet their needs in markets that interest them.
- Some of Interactive Intelligence's contact center applications are less feature-rich than competitive best-of-breed offerings.

Intervoice/Convergys

Strengths

- Following its acquisition of Intervoice, Convergys has a strong ability to provide IVR and voice portal solutions in contact center environments.
- Convergys's Intervoice multichannel contact center suite provides good unified contact center applications. It uses Web services and provides a common set of application development, management and reporting tools across a wide range of contact center applications.
- Now that it has acquired Intervoice, Convergys provides an innovative combination of customer premises- and provider-based contact center infrastructure, along with BPO services. It has strong global brand recognition in the BPO space.
- Consider Convergys when looking for a well-featured, tightly integrated, scalable, yet price-competitive solution. This includes companies whose environments have technology from multiple telephony vendors, and those that do not want their contact center infrastructure decisions to be tied to their telephony infrastructure decisions.

Convergys BPO clients that also require premises-based solutions should evaluate the benefits of an all-Convergys strategy.

Cautions

- Convergys lacks a track record and brand recognition in contact center infrastructure sales and services, and its combination of BPO services and premises-based contact center equipment is unproven as a market proposition. The benefits of the combined offers are, as yet, unclear, except for the experience gained in vertical-market operations. Existing and prospective customers of Convergys and Intervoice must evaluate the potential synergies of this combination.
- At the time of its acquisition by Convergys, Intervoice was still working to integrate the contact center infrastructure offerings it had acquired from Nuasis. Intervoice's acquisition by Convergys creates additional uncertainty and requires the company to re-evaluate the overall strategy for its offerings. This might result in a lack of focus on successful delivery in the short term.
- It remains to be seen how effectively Convergys's sales organization can internalize the benefits of a combined BPO and equipment offering, and whether this offering will attract new business or increase sales to the company's existing contact center customers.
- The core IVR/voice portal offering is not yet tightly integrated into the rest of the contact center infrastructure suite.

Mitel

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. In 2007, the company also acquired a strong ability to support managed services deployments, through its acquisition of Inter-Tel.
- Mitel offers strong integration with Microsoft communications products.
- Consider Mitel when looking for contact center solutions for small and midsize deployments associated with Mitel 3300 telephony environments, particularly when considering a managed services deployment in which the contact center equipment resides at your site but is managed remotely by Mitel.

Cautions

- Mitel has limited ability to support large virtual contact center deployments and multinational customers. Also, not all of its channel partners are skilled in contact center deployments. Prospective customers should check local references.
- Mitel's reliance on its PBX/IP-PBX infrastructure limits sales to Mitel switch environments.

NEC

Strengths

- NEC's high-end CCDesign offering provides a unified suite of contact center capabilities.
- NEC has a large installed base of PBXs and contact centers to which to sell additional contact center products and services.
- Consider NEC when using, or considering using, NEC telephony infrastructure, and where contact center size and sophistication needs are stable.

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

Nortel

Strengths

- Nortel makes good use of Web services in its Contact Center 7.0 suite in order to integrate functionality both within the suite and with other enterprise IT applications.
- Nortel's growing professional services organization augments its channel partners' contact center skills.
- The company has a strong multinational presence and links to carrier environments in many markets.
- Nortel has a large PBX/IP-PBX installed base to which to sell contact center products and services.
- Consider Nortel for well-featured and scalable contact center solutions, particularly when you are using, or considering using, Nortel telephony infrastructure.

Cautions

- Not all Nortel channel partners are skilled in contact center deployments. Prospective customers should check local references.
- Nortel has been slower than some vendors to evolve its products toward a unified architecture that provides a common set of application development, management and reporting tools across a wide range of applications, particularly where offerings incorporate products from OEMs or other partners.
- Nortel sells primarily to existing users of its PBX/IP-PBXs.

Oracle

Strengths

- Oracle's Contact Center Anywhere offers an all-in-one contact center applications suite. It uses Web services and provides 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 strong scalability and multitenant capabilities. It uses IP infrastructure to provide a strong environment for multisite, virtualized contact centers, and to support shared centralized infrastructure, while allowing full departmental- or group-level application configuration and management.
- Consider Oracle when looking for highly scalable, multisite and/or multitenant solutions, particularly when your business is committed to Oracle enterprise applications.

Cautions

- Oracle's product strategy might result in a limitation of users' CRM options and a stronger "lock-in" to an Oracle solution. It might also limit users' ability to evolve contact center infrastructure at a different rate from contact center applications. Prospective customers must evaluate and feel comfortable with Oracle's contact center product development road map and its potential impact on the company's other offerings.
- Oracle has limited ability to provide contact center infrastructure solutions for global deployments.
- In many customer environments, purchasing decisions about contact center infrastructure and enterprise applications software are made by separate groups — particularly in larger enterprises. This might make short-term decisions more difficult and limit the long-term benefits of Oracle's integrated solution.

SAP

Strengths

- The acquisition of Wicom Communications in 2006 provided SAP with a visionary player to complement its NetWeaver subsidiary — one that had early success in the IP contact center market, especially with a hosted software-as-a-service proposition.
- SAP Business Communications Management (SAP BCM) is an all-software suite that includes multichannel inbound, outbound, IVR, call-recording and quality-monitoring capabilities, and strong integration with mobile devices.
- 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. It is also integrating Wicom's development and marketing activities into a more structured and standardized environment — increasing the strategic importance of Wicom's technology to SAP as a whole.

- Consider SAP BCM when looking for IP-based contact center and/or multitenant solutions, especially when your organization is committed to SAP enterprise applications.

Cautions

- SAP BCM has a limited installed base of contact center infrastructure on which to grow. It must therefore focus on the harder task of attracting new customers.
- The company's product emphasis is shifting to embedding SAP BCM capabilities into the broader suite of SAP software, rather than aggressively advancing SAP BCM's contact center infrastructure features. Prospective customers must evaluate and feel comfortable with SAP's road map for contact center product development.
- In many customer environments, purchasing decisions for contact center infrastructure and enterprise applications software are made by separate groups — particularly in larger enterprises. This might make short-term decisions more difficult and limit the long-term benefits of an integrated solution set.

Siemens Enterprise Communications

Strengths

- Siemens Enterprise Communications (SEC) has a good vision for extending its OpenScape Contact Center (OSCC) capabilities into unified communications environments.
- A recent joint-venture transaction between The Gores Group and Siemens AG, which gives the former a controlling interest in SEC, provides stability and should alleviate many of the concerns of existing and prospective customers about the short-term viability of SEC's offerings. Furthermore, The Gores Group's ownership of SER Solutions, an outdialer vendor, brings functionality previously missing from SEC's offerings.
- SEC has strongly pursued openness through its development of an SOA environment. SEC also employs an all-software approach, including the underlying OpenScape Voice switching/softswitch environment.
- Consider Siemens when looking for well-featured contact center applications running in existing or potential Siemens telephony environments.

Cautions

- During the past two years, uncertainty about the sale of SEC by Siemens AG has meant that existing and prospective customers have considered competitors' solutions for strategic contact center investments. This has resulted in SEC not seizing, and in some cases not even being considered for, a number of large contact center opportunities.
- The company sells primarily to Siemens PBX/IP-PBX environments.
- SEC has been slower than some vendors to evolve its products toward a unified architecture that provides a common set of application development, management and reporting tools across a wide range of applications.

- Although SEC is expanding its set of contact center applications, a number of applications are not yet integrated into SEC's OSCC offering. These include dialer, workforce management, recording and analytics applications.

RECOMMENDED READING

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Magic Quadrant for Contact Center Infrastructure, Asia/Pacific, 2007"

"Magic Quadrant for Contact Center Infrastructure, EMEA, 2007"

"Magic Quadrant for Contact Center Infrastructure, North America, 2007"

"Forecast: Contact Centers, Worldwide, 2002-2011"

"Aspect Bolsters Communications Capabilities With BlueNote Buy"

"Gores/Siemens Joint Venture Is Promising but Faces Tough Market"

"Ericsson Deal Could Expand Aastra's Enterprise PBX Presence"

"Hype Cycle for Contact Center Infrastructure, 2008"

"Understanding Gartner's Hype Cycles, 2008"

"Plan and Implement SIP-Based Contact Centers With Caution"

"Unified Communications and Contact Center Synergy"

"User Survey Analysis: Contact Center Purchase Decision and Deployment Strategies, France, 2007-2008"

"User Survey Analysis: Contact Center Purchase Decision and Deployment Strategies, Germany, 2007-2008"

"Magic Quadrant for E-Service Suites"

Note 1
Honorable Mentions

Three vendors that did not meet the inclusion criteria for the Magic Quadrant are discussed here, as we deem them worthy of honorable mentions. Each vendor had been mentioned in a previous regional Magic Quadrant, but failed to qualify for the worldwide version due to a low global profile as measured by inquiries received by Gartner analysts.

ComputerTalk: This vendor's Ice offering is an all-in-one solution. It is aimed at small and midsize contact centers, but can also scale to meet the needs of larger ones. The solution uses its own native SIP stack to provide tight integration of functionality subsets. Ice can be provided for customer premises- and hosted-based solutions, or for a hybrid of the two. ComputerTalk has good presence in Canada and is working to expand into other markets, notably the U.K. and U.S. Companies considering Ice should carefully evaluate the ability of ComputerTalk and its channel partners to support midsize and large deployments, particularly outside Canada.

Syntellect: This vendor's Customer Interaction Management (CIM) platform is a well-architected, all-in-one solution. It is aimed at small and midsize contact centers, but can also scale to meet the needs of larger ones. The solution is sold primarily as a cost-effective multimedia contact center alternative to PBX-centric offerings; it is also gaining traction as an OEM solution sold to smaller IP-PBX vendors looking for multimedia routing capabilities. Although Syntellect has a global presence through its more mature IVR solution business, CIM sells primarily to U.S. customers. Companies considering CIM should carefully evaluate the ability of Syntellect and its channel partners to support midsize and large deployments, especially outside the U.S.

Vocalcom: This vendor's Hermes.net offering is an all-in-one solution aimed at small and midsize contact centers, although it can scale to meet the needs of larger ones. The solution supports its own switching environment based on Dialogic or Asterisk; alternatively, it can run in Avaya switching environments. It sells primarily in Western Europe, although it is also available in other markets around the world. Hermes.net is based on the emerging Host Media Processing technology from Envox, which has yet to achieve the scalability and stability accolades of leading players' technologies. In addition to selling its own solution, Vocalcom resells those of Avaya. As Avaya improves its channel sales program, companies should evaluate Vocalcom's long-term dedication to its own, lesser-known technology.

Note 2
Disclaimer

Avaya is a portfolio company of Silver Lake, a private investment firm that also owns a substantial, publicly disclosed interest in Gartner, Inc., and has two seats on Gartner's 11-member Board of Directors. Gartner research is produced independently by the Company's analysts, without the influence, review or approval of our investors, shareholders or directors. For further information on the independence and integrity of Gartner research, see "Guiding Principles on Independence and Objectivity" on our website, http://www.gartner.com/it/about/omb_guide.jsp.

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): This 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 to invest in and offer the product and advance the state of the art within the organization's portfolio of products.

Sales Execution/Pricing: The vendor's capabilities in all pre-sales activities and the structure that supports them. This includes deal management, pricing and negotiation, pre-sales 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 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: The ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the most 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 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 an 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 native ("home") geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

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