

The Aragon Research Globe™ for Intelligent Video Conferencing, 2022

Intelligent Video Platforms Are Here

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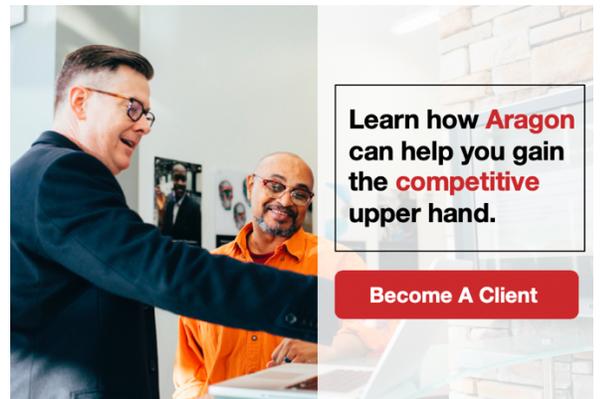
Topic: Intelligent Video Conferencing (IVC)

Issue: Who are the providers of intelligent video conferencing and how will they evolve?

SUMMARY

The 2022 Aragon Research Globe™ for Intelligent Video Conferencing examines 20 major providers in a market that has become the de facto technology for hybrid work. The shift to intelligence has been coming for several years and new capabilities may affect the providers enterprise select.

July 27, 2022 | Research Note 2022-28v



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Key Findings:

- Video conferencing may be purchased standalone, or as part of a digital work hub or as a component of a unified communications and collaboration platform.
- The market is shifting to intelligent video platforms. Sound management, voice analytics, auto transcription, and meeting notes are quickly becoming standard features.
- **Prediction:** *By YE 2022, the team collaboration and web meetings markets will converge (70% probability).*
- **Prediction:** *By YE 2023, 50% of video conferencing providers will offer a telehealth offering.*

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Introduction

Video conferencing is now a de facto standard for the way to conduct meetings in a hybrid workplace. Now that this has occurred, the next evolution is for video conferencing to become intelligent, a shift which Aragon just declared (see [The Shift to Intelligent Video Platforms](#)). Providers of video conferencing offerings have continued to enhance them, which makes the market more competitive than it was before and means there's more strong product offerings to select from than before.

With hybrid work becoming the new normal, many associates will always work remotely. Aragon has been discussing the shift to intelligent video in its last two Globes for video conferencing. Given the progress, Aragon now believes that the video conferencing market should be called intelligent video conferencing (IVC). This shift in the market means innovation will be required by all the major platform providers. In this ninth edition of the Aragon Research Globe for Video Conferencing, we overview 20 major providers in this market.

Collaboration (Video Meetings and Team Collaboration) Are Vital to Hybrid Work

Collaboration has become the go-to set of applications for hybrid work. Video meetings have become core and when people are not meeting, they are chatting. Video-based meetings are vital to the hybrid workplace. With the shift to intelligence, video conferencing becomes a more immersive experience. It isn't about having a meeting anymore, it is about automating the meeting experience. This is the new battle cry for IVC.

With work being done by teams around the globe, the need for a more automated approach to video conferencing has been evolving. Video meetings have helped keep teams on track, kept customer engagement moving, and kept the enterprise operating. Aragon has espoused the benefits of video conferencing for years—but now it is mandatory, and users are demanding more from providers.

There is better recall from a video conference, and Aragon believes that video meetings are now 50% more effective as opposed to traditional audio conferences.

Not only do video conferencing providers need to provide a seamless experience, but they also need to do it across devices. While conference rooms took a back seat in the past two years, the fact remains that users have different ways of connecting to a meeting and providers are responding with better ways to do that.

Intelligent Video Platforms Get Smarter

While we have discussed the need for intelligent video platforms in the past, there has been a bigger shift in the market since the pandemic began. There is no doubt that there is a shift taking place from traditional standard video conferencing to intelligent platforms that do more for users than just record the session. Some of these capabilities are game changers such as meeting assistants that can take over some of the mundane tasks such as taking notes during the meeting itself. Some of the new capabilities of intelligent video conferencing platforms include:

- Automated Note Taking
- Real-time Translation
- Action Items
- Speaker Tracking and Speaker identity
- Background Noise Suppression

Table 1 below provides the complete list of what we think comprises an intelligent video platform. Enterprises should evaluate providers carefully to see which of these features their list of providers can meet both now and in the future.

Capability	Intelligent Video Platforms	Traditional Video
Sound Management	Yes	Optional
Auto Transcription	Yes	Optional
Virtual Agent for Note-Taking & Action Items	Yes	No
Auto Language Translation	Yes	No
Gesture Control	Yes	No
Intelligent Cameras	Yes	Yes
Speaker Track	Yes	Optional
HD Video	1080P and higher	360P and higher
HD Content Sharing	Yes	Standard Resolution
Integrated Hardware and Software	Yes	Optional
Digital White Board	Yes	Optional
APIs and Integrations	Advanced	Basic
People and Meeting Analytics	Advanced	Basic

Table 1: Intelligent video platforms offer a more comprehensive feature set.

The Automation of Meetings: Assistants, Notes, and Actions are Just the Start

Over the past year, many providers have added automatic transcription to their platform (BlueJeans, Cisco, LogMeln, Microsoft, and Zoom). It isn't just about transcription; it is about translation. Microsoft started this trend in 2019 and currently supports about 36 languages that can be translated at the desktop. Cisco recently upped the game, and now supports up to 100 different languages being translated during a single meeting. This now means that global audiences can listen to and understand a live meeting in their native language with no translators required.

Note taking is also not new, but more providers enable automated note taking during a meeting. Some providers such as BlueJeans and Cisco now allow action items to be shared. Many providers partner for such capabilities but more of them are adding it in as a native capability, which is truly shifting the video conferencing category into intelligent video conferencing.

The final part of the automation play is adding virtual agents or assistants to the mix. Conversational AI is starting to come online in many use cases such as internal help desk and customer support. To date, Cisco is still one of the only vendors that has an integrated virtual assistant that will take commands from humans and do actions such as document action items and then distribute them.

Video Quality Matters and Enterprises Need to Demand It

During the pandemic, many video conferencing providers lowered the initial quality of the video service from 720P to 360P. Some providers now offer 1080P, and 4K cameras have proliferated. New use cases such as telehealth will require 1080P or 4k, so as video becomes more dominant, so too will use cases that need a higher resolution. This is in part because computer vision algorithms need a certain resolution to be able to perform accurate predictions (e.g., 75% probability the patient's wound is infected).

Enterprises should demand higher quality video resolution options from their providers. Should their providers not be able to produce road maps that show higher video quality resolution options then enterprises should consider looking at other providers

The Race to HD Video: 1080P Is Here, and so Is the AV1 Codec

Video quality does make a difference for a small or a large event. Video resolution should be a buying criterion that plays into which service is selected. Users still prefer 1080P over 720P, and vendors that can provide higher quality generally can win more business than those that can't.

There is a new standard emerging in video codecs. While all the focus has been on HEVC/H.265, AV1, also referred to as AOMedia Video 1 has emerged. AV1 has up to 30% better video compression, which has been one of the big issues holding back the adoption of 4K via H.265.

AV1 is a six-year-old industry alliance called Alliance for Open Media, which appears poised to take on the MPEG.LA alliance. Regardless, it is important to understand video quality. Today enterprises must demand 1080P, which is AVC/H.264. Given the reluctance of so many to support HEVC/H.265 due to bandwidth and required royalty payments, AV1, which is supported by Amazon, Cisco Google, Intel, Microsoft, Mozilla, and Netflix, appears to be ready for primetime.

4K Video—Ask Providers for a Roadmap

We have talked about 4K video for the enterprise for the last four years. While it remains a desired capability, enterprises have not pushed for it. We feel that developments such as the rise of Open Source AV1 offer potential to enable this to happen faster. To date, Avaya, Cisco, Google, Haivision, and Lifesize offer true 4K support. Besides NVIDIA Maxine, the secure reliable transport (SRT) standard, pioneered by Haivision, enables better encoding and compression and has more providers supporting it.

Experience Matters—The Integration of Hardware and Software

With the shift to intelligent videoconferencing there's more to do than meets the eye when it comes to integrating software with hardware systems. The key point is experience and we are seeing providers that have integrated offerings, such as Cisco. We are now seeing a new era emerge where, like in the past, video conferencing software and hardware were tightly intertwined. Vendors such as Cisco and Neat with Zoom are also providing a tightly-integrated offering that delivers a better experience

With hybrid work as the new model there are new smaller video conferencing devices as well as updates to video conferencing all-in-one devices for conference rooms. Many enterprises are still lacking a strategy for integrated hardware and software. The good news is that more providers are offering interoperability between different providers. Pexip offers solid integration and others such as Cisco have demonstrated calls between Cisco Webex and Microsoft Teams.

Many enterprises have not invested in better video conferencing experiences. We do expect more spending on hardware to support conference room experiences. Leading providers have offered video room solutions that are intelligent and make the meeting experience more immersive and high quality through the use of HD video with auto-zoom and HD audio with auto-muting of background noise. Room offerings do vary, and enterprises should do

evaluations before making a volume purchase. We do expect a shortage of these room systems as demand will surge.

We also expect a greater willingness among some firms to provide more than just a laptop for work from home. While several providers offer standalone units—we’d also point out that an iPad Air or iPad Pro is an excellent video conferencing device.

Video Conferencing Overtakes Telephony in Collaboration and Communications

Video conferencing has emerged as the single most important part of a communications and collaboration technology platform. While the unified communications (voice) market is still larger, we’ve seen tremendous growth in collaboration and video conferencing is in larger demand than team collaboration (see Aragon Foresight Visual Forecast for Collaboration).

The demand for IVC continues to put significant pressure on nearly every vendor to enhance and improve their product offering to keep up with the demand. New features, better reliability, and new ways of collaborating over video are just some of the things that vendors have done to make their platform more appealing.

Intelligent Video Conferencing, Marketplaces, and the Rise of Industry Clouds

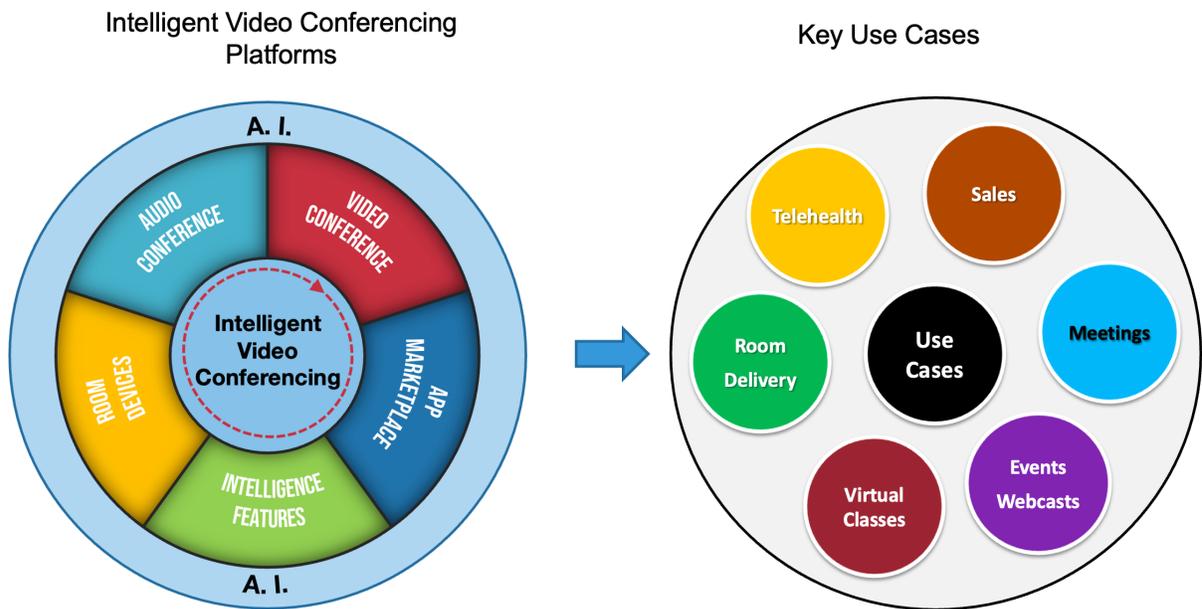


Figure 1: Intelligent Video Conferencing features are helping to drive more focus on use cases.

No vendor can innovate in isolation. While vendors are making IVCs part of a larger UCC platform, they are also opening up the meeting capability to enable third-party

applications to integrate directly with the meeting platform. The other reason for opening up the meeting platform is to allow new innovation.

We continue to feel that partner marketplaces are viable for an enterprise to extend its video conferencing capabilities. Cisco, Google, Microsoft, Pexip, RingCentral and Zoom have done significant work here with their partner marketplaces.

Aragon feels that more providers will offer their IVC offering as part of a role or industry solution, also referred to as industry clouds. Microsoft now offers four industry clouds not specific to collaboration. Both Pexip and BlueJeans by Verizon have been early to the telehealth space.

Telehealth: A New Use Case to Watch

Telehealth, which leverages video conferencing for doctor-to-patient virtual visits is expected to grow over 20% a year, which is slightly ahead of Aragon's new forecast for overall collaboration.

Telehealth represents a new use case for video conferencing. Verizon Business just announced that it is now offering a new service called BlueJeans Telehealth to healthcare providers. Aragon expects that more video conferencing providers will enter the telehealth space. For now, Verizon will compete with providers such as Cigna and Teladoc.

Prediction: *By YE 2023, 50% of video conferencing providers will offer a telehealth offering.*

The Secure UC&C Era: Why Enterprises Must Act

Secure communications and collaboration has now become a requirement for enterprises, regardless of size (see Note 1). The challenge enterprises face is an unprecedented level of risk that is often tied to insecure communications infrastructure. Many firms have already been compromised, and many are

Note 1. Three Key Security Parameters to Verify Before Purchasing a VC Offering:

Encryption

- All media should be encrypted, both the session itself and the content.
- Encryption keys: some vendors offer encryption keys for advanced management.

Role Permissions:

- Attendee permissions: the meeting organizer should be able to change settings so attendees cannot take control of a meeting by default.
- Admins and hosts need to have more robust permissions.

Data Center Security

- Understand the security of the data centers being provided by the provider.
- Locations: understand where meetings will be initiated from and where meeting recordings will be stored. Enterprises may want to execute a service level agreement.

actively being compromised now and are completely unaware. The situation is worse now that some of the attacks are from organized cybercrime or government-sponsored organizations. These attacks and hacks are very sophisticated and can easily overwhelm a communications infrastructure.

In order to protect against these increasing threats, enterprises need to embrace a holistic, defense-in-depth solution, considering all aspects of security, including:

- Securing user access and identity
- Securing apps and devices
- Segregation of data and privileges
- Securing content & streaming media
- Securing backups and protecting from alteration or deletion
- Protection against data loss and malware
- Compliance with legal and regulatory policies

For team collaboration, security and privacy are key. Enterprises should ensure that vendor capabilities are examined carefully to ensure that there are no easy ways for hackers to spy on users or even hack them.

Standalone IVC Vs. Buying as Part of a UC&C Offering

Video conferencing can be purchased as a standalone best-of-breed offering, it can be purchased bundled with team collaboration, or it can be part of an integrated unified communications and collaboration suite.

Today, many small enterprises buy each of these capabilities as a best-of-breed capability, and this is promoted by many VC firms, but the value of an integrated UC&C platform is that communication channels can be switched more seamlessly, which becomes important during times of remote work or pandemic.

Given that videoconferencing is now intelligent, selecting providers that are investing in their videoconferencing platform with intelligence and automation features is just as important as selecting a best-of-breed product versus a platform.

Intelligent Video Conferencing, Business Buyers, and Digital Work Hubs

Many IVC providers have evolved their offering to do more than just meetings and messaging. These communications-led capabilities are becoming part of a digital work hub—where meetings are part of the overall platform.

Digital work hubs are a different way of buying technology. Instead of a stack of one type of technology, business buyers are looking for solving the problem of getting work done. Video conferencing and chat are a key part of a digital work environment. Avaya, Cisco, Google, Microsoft, and RingCentral are all offering collaboration-led work hubs.

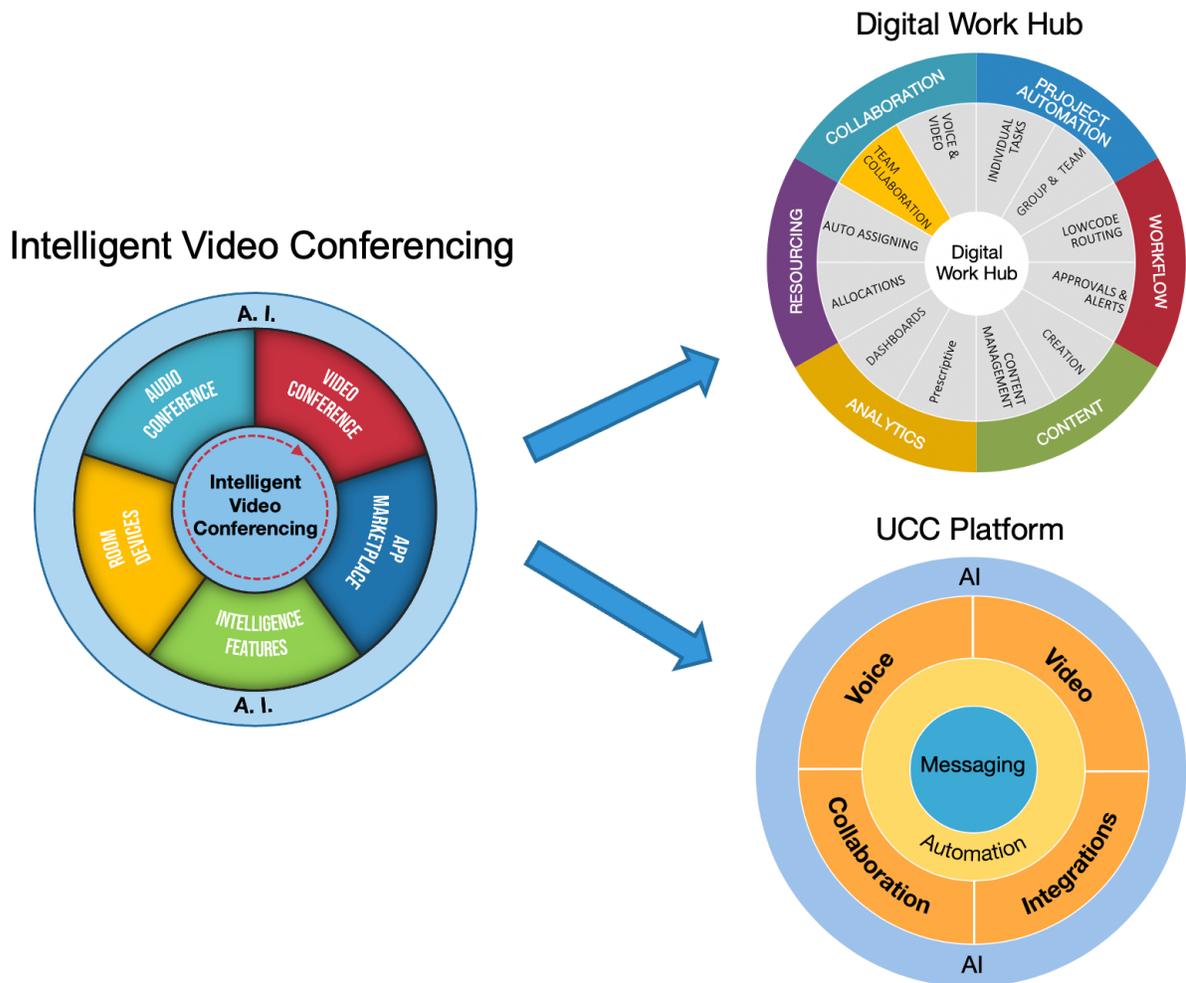


Figure 2: Video conferencing is looked at as part of a UC&C stack by IT buyers and as part of a work hub by business buyers.

This shift to business buyers looking at business needs from a closer needs perspective will change how software services and products are marketed. It also means that because of business buyer needs being different there will be an increase in the number of products purchased – but with better integration and connectivity, this will not be the issue that it was in the past.

How to Use This Globe

From a buyer’s perspective, this Globe represents a wide assortment of vendors that have expertise in different parts of the IVC spectrum. Within this converged market, there are different levels of convergence. New this year is the focus on intelligence, and many providers have evolved their product to offer more intelligence and automation.

At another level, convergence has happened where traditional room-based video conferencing providers include the necessary content, application, and screen-sharing

capabilities in conjunction with HD quality video room systems and multiple endpoints, including desktop and mobile. Still others are focusing on large scale webcasting or the smaller and more engaging webinars.

Our advice to enterprise buyers is to first consider what your core requirements are regarding IVC. We encourage buyers to go look carefully at requirements for the enterprise and for each business unit. Security has become a front and center issue. For specific business unit needs, the quality requirements for external facing meetings should not be overlooked.

The table below segments the providers in this report by the key use cases they support:

Vendor	Video Meetings	Intelligent Features	Room-based Video Conferencing	Webcasting	Webinars	Breakout Rooms
8x8	✓	✓	✓	✓	✓	
Adobe	✓				✓	✓
Avaya	✓	✓	✓	✓		✓
BlueJeans	✓	✓	✓	✓	✓	✓
Brightcove	✓	✓		✓	✓	
Cisco	✓	✓	✓	✓	✓	✓
Google	✓	✓	✓	✓		✓
Dialpad	✓	✓	✓			
Lifesize	✓		✓	✓	✓	✓
GoTo	✓	✓	✓	✓	✓	✓
Intermedia	✓	✓	✓			✓
Microsoft	✓	✓	✓	✓	✓	✓
Panopto	✓	✓		✓	✓	✓
Pexip	✓	✓	✓			
Qumu	✓	✓		✓	✓	
RingCentral	✓	✓	✓		✓	✓
TrueConf	✓	✓	✓	✓		
uStudio	✓	✓		✓		
Vbrick	✓	✓		✓	✓	
Zoom	✓	✓	✓	✓	✓	✓

Table 2: Comparing the capabilities of the different providers.

As market convergence continues with VC, we are seeing buyers increasingly look for solutions that integrate high-quality video with content sharing capabilities. This will bode well for those providers who can offer a converged experience. While use cases such as webinars

are still in the expertise and domain of specialist video conferencing and online meetings providers, we will see those capabilities increasingly become part of converged VC offerings.

The Aragon Research Globe™ for Video Conferencing, 2022 (As of July 26, 2022)



Figure 3: The Aragon Research Globe™ for Intelligent Video Conferencing, 2022.

Leaders

Avaya

Avaya, which offers a full UCC platform, has continued to innovate with Avaya Spaces and Avaya Cloud Office. Avaya Spaces is its flagship intelligent video meeting platform with fully integrated team collaboration. It supports the ability to connect via any device—desktop, mobile, and huddle rooms. Avaya Spaces has seen solid customer adoption, in part because of its modular CPaaS architecture, which includes composable experiences, enabling organizations to quickly build the experience they need for verticals or workflows. Also, Avaya is of the few providers whose room-based systems support 4K video.

Avaya continues to enhance its Spaces offering with a partnership with NVIDIA that features innovative, AI-powered video capabilities for both low bandwidth and high-quality, more engaging meetings. Avaya is first to market with these upgraded capabilities and offers a smoother, immersive video experience that is noticeable to users. The Spaces browser-first user experience enables all capabilities without a download or installing a plug-in simplifying meeting participation. Avaya OneCloud provides a complete UCC solution with meetings, messaging, and telephony backed by both its enterprise and midmarket platforms.

Avaya continues to partner with RingCentral for Avaya Cloud Office and has announced new capabilities, including Avaya Cloud Office Rooms with CU360 huddle system for hybrid meeting experiences. Avaya Cloud Office, Avaya Spaces, and Avaya OneCloud can leverage the full portfolio of Avaya USB connected cameras ranging from laptop huddle cameras to speaker tracking PTZ devices. Avaya also integrates with Apple, Google, Microsoft Teams and Office, and Salesforce/Slack. With the rise of intelligent video meetings, Avaya is well positioned to meet the needs of enterprises with its growing portfolio of intelligent video offerings that work in the cloud and on-premise.

Strengths

- H.265 HD video, high quality content sharing with room systems, desktop, and mobile clients
- AI-enhanced video user experience, no download or plug-in required with a browser
- Extensive video interoperability with Cisco, Poly, Lifesize, and Microsoft
- UCC platform
- Partner network and ecosystem

Challenges

- Balancing two product lines

BlueJeans

BlueJeans, by Verizon continues to focus on both meetings and events. In April 2020, it continued to win over enterprises with a dual approach for both meetings and events. BlueJeans Smart Meetings includes the ability to capture action items during a meeting and to tag important discussion points for later recall in a recording. BlueJeans also offers BlueJeans Rooms as a Service, which features the Poly Studio X Series. BlueJeans also allows customers to leverage investments in other room hardware solutions, including Cisco, Lifesize, and Poly.

Verizon Business continues to invest in and promote BlueJeans Telehealth, its new offering for virtual healthcare visits with a doctor or caregiver. BlueJeans Telehealth will compete against other pure play telehealth providers, and we expect others in the video conferencing market to enter the telehealth market. It will be powered by the BlueJeans mobile and desktop browser experience and will offer per-visit pricing plans for healthcare providers.

Since becoming part of Verizon, demand has increased for BlueJeans, as video conferencing has become the new dial tone for collaboration. Part of the demand comes from its quality—including reliability and video fidelity. For high-end events, event management and video quality are both vital—and that too is helping them win more large events. BlueJeans also offers virtual class capabilities via its breakout rooms feature. It now offers interoperability with other providers, including Cisco, Microsoft Teams, and Zoom. BlueJeans also integrates with third-party solutions such as Google Suite, Microsoft Office, Slack, Workplace by Facebook, and other applications.

Strengths

- Dolby voice audio technology
- HD video and content sharing
- Room-as-a-service
- Broad range of third-party solutions and integrations
- Microsoft Teams integration
- Growing focus on events
- Telehealth use case

Challenges

- Deployment options, besides cloud

Webex by Cisco

Cisco, under the leadership of Jeetu Patel and GM Javed Khan, has doubled down on its Webex business unit, with a complete pivot to make meetings and events intelligent. Cisco now offers intelligent video meeting experiences that combine and tightly integrate the experience between the app and its growing set of meeting hardware solutions. The Webex Desk Mini, a new device launched during Covid-19, offers a smaller footprint for remote workers. Cisco also offers an immersive sharing capability that allows the presenter to be seen in front of the presentation, and its new Holographic Collaboration allows for augmented reality.

Cisco has a large set of security capabilities that provide some of the best security both for networking and collaboration. This includes support for privacy, encryption, data loss prevention, mobile security, and legal hold.

On the intelligence front, the Webex App features the Webex Assistant, which can take notes and assign action items. Its intelligent features also include gesture recognition, built-in noise reduction, optimizing for individual human voices, better audio and video quality. Additionally, Webex offers real-time translation support for more than 100 languages.

Webex is now driving a tightly integrated intelligent meeting service and intelligent meeting room devices. Cisco has been continually refreshing its hardware that includes the Desk Series, the Board Series, its Video Phones and its new 4K Desk Cameras. Cisco also has a strong relationship with Apple, and Webex can utilize the smart camera features in the iPad Pro services.

Cisco is also focusing on mobile work experiences. It has partnered with Ford and others to allow Webex audio meetings to be delivered via Car Play or Android Auto car interfaces. Finally, the growing support for both global SaaS cloud delivery and hybrid options, gives enterprises choices when it comes to deployment.

Strengths

- Cisco and Webex brands
- Platform approach covering all collaboration workloads
- High quality video across devices, including mobile
- Intelligent video rooms and endpoints
- Webex Assistant for Notes and Action Items
- Intelligent audio that can isolate and optimize voices
- Cisco Webex Mobile Platform
- FedRAMP certification for Webex
- Interoperability with Microsoft Teams
- Advanced audience engagement capabilities
- Integrations with popular 3rd party tools (e.g., Salesforce)

Challenges

- Balancing focus on collaboration vs. networking and security

Google

Google has continued to evolve Google Workspace, including its flagship Google Meet video conferencing platform. The Google Meet platform, which works in conjunction with Google Chat has had a complete makeover. Now, Google Meet offers backgrounds, auto transcription, and, more recently, picture-in-picture capabilities. Google Meet, when combined with Google Chat and Google Voice globally, makes Google a complete UCC platform provider.

Google Meet continues to have one of the most seamless join experiences—accessible from any major browser without download, or from its mobile apps. Google Meet is also seamlessly integrated with the broader family of Google Workspace collaboration offerings, which allow users to launch straight into a full Meet video call from Calendar, Gmail, and Chat. The tight integration with calendar means that meetings can be scheduled that fit users' calendars domestically and internationally.

Google Meet and the full Google UCC offerings work on a global basis making global calls a no-brainer. With the right licensing, Google Meet allows meetings of up to 500 users. It now also offers more robust breakout room features, including the ability to move participants back to the main room.

Google provides a number of meeting devices in a variety of form factors, including the latest AI-enabled Series One room kits, the huddle room focused Acer Chromebase, and the 55" Jamboard digital whiteboard with Google Meet built in. Its partnership with Pexip enables users to join Google Meet from Microsoft, Cisco, or Poly devices. Google integrates all of the management capabilities into the Google Workspace admin dashboard to allow multiple Jamboard and Meet devices to be managed from a console. Besides its ease of scheduling meeting capabilities on a global basis, Google has continued to invest in its UCC portfolio.

Strengths

- Enterprise penetration with Google Workspace
- Real-time collaboration in meetings
- Video room offerings
- Video quality
- Ease of use
- Meeting scheduling ease of use
- Seamless join experiences

Challenges

- Balancing focus on Workspace vs Google Meet, Voice and Chat

GoTo

In February 2022, LogMeIn rebranded the company as GoTo to focus more on its UCC platform and video conferencing offerings. GoTo is led by CEO Michael Kohlsdorf. The GoTo product family for collaboration includes its flagship GoTo Connect, which includes GoTo Meeting, GoTo Webinar, GoTo Room, and GoTo Contact.

An important update in 2022 is that GoTo Meeting now supports 1080P for both live meetings and recording playback. GoTo Room has key integrations with device providers, including Logitech and Poly. GoTo Meeting also features Smart Assistant that has built-in note taking, transcription, and action items. For webinars, GoTo Webinar is easy to configure and easy to operate and is often ideal for SMBs that have limited staff.

One of the shifts in go to market has been more focus on industries. GoTo now focuses on five industry markets, including automotive, education, healthcare, legal and professional services. Besides GoTo Meeting the GoTo family of products includes GoTo Connect, GoTo Room, GoTo Training, GoTo Webinar, and GoTo Contact Center.

GoTo is a complete UC&C provider due to its expanded footprint with both GoTo Connect, which integrates with GoTo Meeting. With a new Channel Chief and new 14-day trial offerings, GoTo is more focused on collaboration and communications.

Strengths

- Freemium to premium model
- Automation of meeting scheduling
- Ease of use
- Mobility support
- Phone bridge integration
- Webinar use case

Challenges

- Overlapping product branding

Microsoft

Microsoft has continued to enhance Microsoft Teams as its core Collaboration platform for meetings and team collaboration. Video meetings have become the new dial tone for Microsoft Teams. Besides Meetings, Microsoft Teams is the primary work hub for all voice and messaging-based communications. As part of the Microsoft 365 and Office 365 bundles, Microsoft Teams has become the lead interface for collaboration, overtaking Outlook, which now can run as a tab inside Teams. Microsoft 365 adoption has been growing, because it is a full digital work hub with a set of independent applications that are increasingly integrated together.

In 2022, Microsoft added the ability to remove background noise from meetings and calls. Microsoft Teams webinars have also been available for a year

One of the areas of innovation for Microsoft Teams has been Together Mode. Popularized first on NBA basketball game televised events, Together Mode allows users to interact in a different view mode than a traditional panel of video conferencing users. In 2022 Microsoft launched touch enabled display offerings from Neat and Yealink. Microsoft Teams Room Systems also continues to partner with certified providers, including Crestron, Lenovo, Logitech, HP, Yealink, and Poly.

In addition to UC&C, Microsoft Teams has evolved to become a digital work hub for front-line workers. New capabilities include Walkie Talkie capabilities with certain mobile devices. Teams is also the center of the Employee Experience offering called Microsoft Viva. Viva, however, does require separate licensing. The innovation in Microsoft Teams—has allowed Microsoft to gain solid enterprise adoption for internal use.

Strengths

- Microsoft brand
- Office 365 integration
- Third Party Integrations
- HD video quality on point-to-point calls
- Global PSTN conferencing coverage

Challenges

- Requires separate licenses for audio conferencing (phone dial-in)

RingCentral

RingCentral announced a new President Mo Katibeh in May 2022, as well as a new CFO Sonalee Parekh. Ring Central offers its Message Video Phone™(MVP®) global platform that features an enhanced focus on videoconferencing. RingCentral also introduced smart video conferencing features in March 2022 that include live meeting summarizations, short-form summaries, video highlights, hot-linked keywords, and a new white boarding capability. The RingCentral UCC platform is now available in 41 countries with its full set of capabilities—high-quality voice, video conferencing, mobile messaging, and cloud contact center.

RingCentral Video is included in the overall unified communications digital work hub called RingCentral MVP, which features messaging, video, and phone. In addition, RingCentral has a freemium version of its video conferencing offer, which features both video and messaging and focuses on pre-, during, and after meeting collaboration. RingCentral also announced that users from Cisco Webex and Zoom could join a RingCentral MVP meeting.

In March 2022, RingCentral formed a strategic partnership with Frontier Communications that included RingCentral MVP combined with Frontier symmetrical high-speed fiber internet with capabilities up to 2 Gig. RingCentral has continued to leverage its other reseller partnerships Avaya, Atos, Alcatel Lucent, and Mitel.

It has continued with its global expansion, which includes growth in direct sales and in partnerships that expand the distribution of RingCentral Office. Its quarterly revenue puts it at over \$1.5 billion in annual revenue. The RingCentral Open Platform is also a growing contributor to its growth—it now has over 50,000 registered developers and supports over 5,000 integrations, including Microsoft Teams, Google G Suite, NetSuite, and Salesforce.

Strengths

- Mobile-first app
- Freemium support
- Third-party app integration
- Voice and video support
- Task management
- Third-party content sharing
- Ease of configuration and deployment
- Open platform and app gallery integrations

Challenges

- Task and project management

Zoom

Zoom, under the leadership of CEO Eric Yuan, has seen significant growth, with revenues now over \$4 Billion. On June 6th, Zoom announced that it had hired Greg Toom as its new President. Zoom leads with its flagship video meetings offering, and in June 2022, it announced a new Platform, Zoom One, which is a UCC bundle that includes Meetings, Chat, and phone along with whiteboarding. In addition, Zoom's webinar has seen a surge in demand. Its new virtual events offering is priced aggressively.

Zoom offers a growing set of AI capabilities, some of which are powered by a growing marketplace of partners, which includes, Avoma, Gong, Meetgeek, and Otter.ai for meeting assistants analytics and live transcription (already native in Zoom). Other partner apps include scheduling bots and more. Zoom has a strong set of Zoom Room options via partners such as Neat and Poly. The level of integration has been enhanced as new offerings from both providers offer native sound and video management features.

With Zoom Phone, which has continued to see increased growth, Zoom has evolved into a complete unified communications and collaboration provider. Zoom continues to leverage its growing partner marketplace (over 1,300 apps), and the marketplace is helping it win in small and large accounts.

Strengths

- Scalable HD video conferencing and webinars
- Webinars and Live Events
- Software-based video room systems
- Mobile apps
- Webinars
- App marketplace
- UCaaS offering
- Innovation

Challenges

- Balancing focus on meetings vs. full UCC platform

Contenders

8x8

8x8, led by CEO David Sipes, offers the 8x8 Work for Web platform as well as an integrated contact center. 8x8 Meet its Flagship Meeting platform that offers a full web and mobile experience. 8x8 also offers a room solution, which features partner solutions, including Crestron, Logitech, and Poly. 8x8 also offers 8x8 Messaging, its team collaboration offering that is bundled with its plans. The enhanced capabilities include SMS, MMS, and team chat. Besides its own messaging offering, 8x8 also offers 8x8 Voice for Microsoft Teams, and with it, the ability to offer voice calling in 43 countries. Part of the renewed product focus at 8x8 also means that it announced a financially backed SLA that offers a 99.99% uptime guarantee across its platforms.

8x8 also offers Jitsi as a Service, an enterprise-ready video meeting platform that allows developers, organizations, and businesses to build and deploy video solutions. Customers can use the Jitsi platform to embed and power up their apps with meeting capabilities. In 2018, 8x8 acquired the Jitsi open-source video technology and team from Atlassian. Jitsi now powers all 8x8 Video Meetings and continues to grow in the heart of many successful initiatives, while 8x8 continues to be an active sponsor of the Jitsi developer community.

8x8 offers an integrated UC&C and contact center platform that it calls XCaaS or eXperience Communications as a Service. The 8x8 eXperience Communications platform includes calling, messaging, video meetings, contact center, and CPaaS. 8x8 offers an integration framework and out-of-the-box integrations with over 50 business and productivity apps, such as Microsoft Dynamics, Salesforce, and Slack. 8x8 also offers direct routing as a service with 8x8 Voice for Microsoft Teams.

8x8 provides pure cloud voice calling in over 50 countries and has an extensive global cloud footprint with data centers in North America, the UK, Amsterdam, Africa, APAC, and Brazil. It is also the only vendor in the industry to offer a platform-wide, financially-backed 99.999% uptime SLA.

In January 2022, 8x8 closed its acquisition of Fuze, known for its large customer base of enterprise-size organizations.

Strengths

- UCC platform
- Integrated client
- Meeting and call quality
- Video rooms offering
- Webcast support
- Video conferencing integration options

Challenges

- Balancing focus on UCaaS vs. meetings

Brightcove

Brightcove, a global company based in Boston, has continued to grow by focusing on product innovation and acquisitions to enhance its flagship enterprise streaming platform. The Brightcove portfolio includes enterprise-grade solutions built for use cases spanning marketing, internal communications, and leading global media companies such as OTT and monetization.

Brightcove's solutions enable live and on-demand streaming for a variety of use cases such as town halls and support for internal and external video communications and training activities. Today, Brightcove supports the traditional video conference needs of its customers through integrations. Those integrations are the Brightcove Zoom Integration that enables organizations to run Zoom meetings, events and webcasts through the Brightcove platform. Brightcove also offers a Microsoft Teams integration, which allows for the storage, management, and secure distribution of Microsoft Teams VOD Assets with the Brightcove platform.

Capabilities such as Interactive Rooms (IRooms), Agenda Scheduling, Chat, and Simulated Live enable users ranging from marketers to event managers, planners, and facilitators to successfully build, launch, and manage virtual event experiences. Furthermore, Brightcove's Live Interactivity solution enables users in ecommerce or retail segments to deliver interactive elements such as chat and a commerce UI.

In October 2021, Brightcove announced its new Brightcove Marketing Studio as well as its new Brightcove CorpTV offering. While Brightcove has always had a marketing offering, the new Brightcove Marketing Studio provides extensive integrations to CRM, ABM, DAM and social media platforms. Brightcove also announced in 2021 the acquisition of HapYak, which enables users to implement video interactivity via clickable hotspots, video branching, shopping cart purchases, and overall personalization. And in 2022, the company acquired Wicket Labs which significantly upgraded the company's video-based analytics to include the measurement of not only video asset performance, but also user and cohort-level engagement metrics.

Strengths

- Scalability
- Video Marketing Platform
- Video analytics
- Social video management
- Live broadcast
- Breadth of integrations to MAPs available
- Stream quality
- OTT flexibility

Challenges

- Balancing demand between enterprise and OTT use cases

Lifesize

Lifesize, led by new CEO Trent Waterhouse continues to focus both on video meetings and intelligent contact center offerings. Lifesize has continued to offer its 4K-enabled video conferencing platform, and in December 2021 announced its Multi Application Room Solution (Mars). Mars enables Lifesize hardware to connect to third-party offerings including Microsoft Teams, Cisco Webex and Zoom. The Lifesize video conferencing platform is one of few that offers true 4K resolution support. Lifesize also features, including custom layouts, raise hand capabilities, meeting security and moderator control enhancements, and digital whiteboarding and physical whiteboard capabilities via its acquisition of Kaptiveo.

Lifesize makes its own 4K room systems, with the family of offerings including the Lifesize Icon 300, Icon 500, and Icon 700. In addition to the Lifesize cloud service, these systems may also be used with third-party cloud video services through interoperability or with the new Lifesize Connect solution for BYOD. New room system features for 2020 included remote upgrade management for admins and an intelligent, hands-free meeting integration with AWS Alexa for Business.

Lifesize is also offering cloud contact center solutions and is leading the native video support use case, which leverages the Lifesize video conferencing platform.

Lifesize offers numerous connectivity options, including integrations to Google and Slack and interoperability with Poly and Microsoft Teams. Lifesize is also focusing efforts on video-enabling business applications and revenue-generating activities in key verticals, such as healthcare and professional services. With Mars and the ability to support both on-premise and cloud-enabled video conferencing, Lifesize is positioned well for the future.

Strengths

- Ability to integrate disparate systems
- Hybrid capabilities that pair a cloud-based service with conference room hardware
- Room system offerings, now including Kaptiveo whiteboard collaboration
- 4K video
- Overall video quality and ease of use

Challenges

- Breakout room functionality

Panopto

Panopto added its first Chief Sales Officer, Will Wyatt, and first CMO, Christina Mautz, in 2021. Panopto's video management system offers video portal, video search, CMS, meeting recording, live virtual events, and analytics. In April 2021, Panopto announced the acquisition of Ensemble Video and began the process of migrating the Ensemble customer base to Panopto.

New capabilities in 2021 include deep integration with Microsoft Teams that adds Smart Chapters to every Teams meeting recording, allows the use of Panopto functions inside Teams, and adds search for Panopto videos within Office 365 applications. Panopto also has meeting recording integrations with BlueJeans, Cisco, LogMeIn, Pexip, and Zoom. Panopto now offers automatic transcription into 20 languages, which is ideal for global deployments. Panopto Capture is a browser-based video recorder that allows any user to easily record their screen, camera, and slides without installing software. Its platform is also a strong choice in corporate learning with integrations for Cornerstone, Camtasia, Salesforce, and Slack, as well as comprehensive accessibility support. One of the growing use cases that Panopto supports is live video, which also has support for multi-camera HTML5 live streaming as well as live event analytics.

Panopto offers different plans, including Panopto Basic, Panopto Pro, and Panopto Enterprise. Although its heritage was in higher education, it has seen significant adoption among enterprises for training use cases. One thing that Panopto has continued to enhance is its virtual event capabilities for CEO town halls, sales kickoffs, and other types of corporate communications.

Strengths

- Corporate and higher ed use cases
- Ease of use
- Good analytics capabilities
- Video search
- Meeting recording options
- LMS integration
- On-premises or hosted deployment options

Challenges

- Balancing focus on higher education and corporate markets

Pexip

Pexip announced its new CEO Trond K. Johannessen, in April 2022. Pexip has complete focus on three core areas: secure video meetings, video meeting interoperability, and a newer focus on video applications. Pexip offers Pexip Build for organizations who want to develop their own applications on Pexip's platform, and Pexip Engage for those who want a personalized customer engagement solution. Pexip Engage was announced in April 2022 and offers video journeys across the customer lifecycle, particularly for sales engagement.

Pexip has a number of intelligent video features, including its AI-based Adaptive Composition, which can automatically frame users and adjust the screen layout in a meeting so that the video looks more natural. This feature works on any device. It also announced more meeting controls, so admins know who has joined and from what type of device.

Pexip has been a pioneer in video vwr/interop, gateway, and video system registration services. Pexip offers a range of deployment options to meet the unique needs of customers. In 2020, Pexip announced the Pexip Private Cloud, which should be a popular offering with government and healthcare focused enterprises due to its ability to protect data. Pexip also offers a self-hosted option which can be deployed in public cloud offerings, including Amazon AWS, Google GCP, or Microsoft Azure, or deployed on-premises. Its Pexip Government Cloud is FedRAMP "In Process" and available in Azure Government Cloud.

For enterprises with multiple providers, Pexip natively integrates with video conferencing solutions from Cisco, Poly, and Lifesize, and with any other software or hardware UC solution, such as Microsoft Teams or Google Hangouts Meet. Pexip has browser-based support for joining virtual meetings with various endpoints and communications systems. With its growing focus on user-based applications, Pexip has new offers for buyers that go beyond its historical integration capabilities.

Strengths

- Video system interoperability
- Private cloud offering
- Scalability and global reach
- Virtual meeting rooms
- Gateway services (MS Teams and Hangouts Meet)
- Microsoft and Google partnerships
- Global community of channel partners

Challenges

- Market awareness

Qumu

Qumu, supported by a permanent, remotely-based workforce, and led by CEO Rose Bentley, has refreshed its leadership team with SaaS leaders in key positions such as COO, CFO, CMO, CCO, and CTO. This is driving Qumu's transformation and its overall go-to-market improvements alongside a product refresh. Qumu focuses its enterprise video platform on executive communications, critical and emergency communications, external launch events, and employee and customer engagement through live and on-demand video and content management, distribution, along with advanced analytics for consumption, usage, and quality of service. In 2021, Qumu made new investments in its channel program by hiring new channel management and partnering with JS Group, a channel strategy agency, to forge indirect growth. Qumu announced a new major distribution partnership with TD SYNEX, which will give Qumu access to over 150,000 resellers, as well as partnerships with Kollektive, Vendasta, Speaker Dynamics, and GovSmart.

Qumu's enterprise video platform offers live streaming at scale, asynchronous video capture, storage, and comprehensive management and analytics of live video and video on demand (VOD). It has extensibility to scale video broadcasts, supporting live streaming to over 100,000 viewers, while also recording and creating video on demand (VOD) assets.

One of the recent innovations is the Qumu App for Zoom Events, which makes it easy to broadcast and capture live Zoom-based events to audiences of any size with comprehensive video management, on-demand distribution, and enterprise-grade security. Qumu added automatic live and on demand captions, in addition to transcriptions to its offering. Qumu also continues to enhance its security features, including "bring your own encryption keys". Qumu's Pathfinder offering, an intelligent content distribution engine, enables cloud customers to utilize its software and hardware endpoints within the customer's network, enabling edge-based, peer-to-peer, and hybrid delivery. Qumu continues to enhance its analytics on performance and delivery. Qumu also continues to grow its partner ecosystem and professional services offerings to meet the evolving needs in the enterprise.

Strengths

- End-to-end video conference streaming
- Team-to-many webcasting
- Cloud, hybrid, and on-premises offering
- Open architecture for extensibility
- Video editing
- Video analytics (user and network)

Challenges

- Diversifying its partner ecosystem

Vbrick

Vbrick announced in November 2021 that its Chairman Paul Sparta stepped into the CEO role. Vbrick Rev, its enterprise video platform, is sold directly and through channel partners. In 2021, Vbrick also expanded its relationship with Cisco, a key distribution partner. Rev offers video capture, video content management, live video streaming, distribution, AI-based analytics, and video conferencing integration. In 2022, Vbrick released screen recording functionality using WebRTC and the ability to live broadcast to an audience immediately with the click of a button. The native Rev video editing abilities help to streamline the post-production of live event recordings. In August 2021, Vbrick announced that it now supports embedded Webcasts, so live and recorded events can be leveraged inside of a corporate intranet or through virtually any web application.

Rev IQ is its computer vision offering that enables facial recognition, live transcription, translation, and an enhanced viewing experience called Pulse. In 2020, Vbrick added advanced analytics that provides enhanced interactive search and visibility on who appears in a video and when.

Vbrick's Distribution offering consists of its proprietary Distributed Media Engine (DME) eCDN (which includes content caching and multicast) and its Rev Connect peer-assisted content delivery solution. Vbrick Distribution offers multiple modalities for video delivery at scale without requiring "per server" licenses. Vbrick provides live transcription from eight spoken languages and live translation in over 48 languages within Rev. Vbrick integrates with Microsoft Teams, Webex, Zoom, and Pexip to enable large-scale meetings while also offering meeting archiving and management of recordings. Vbrick powers Webex Webinars with more than 3,000 attendees and also offers an enhanced integration with Microsoft Teams, making it easier for Teams users to access video content stored in Rev.

Vbrick continues to be one of the few enterprise video providers to be FedRAMP-certified, and this will help to meet the growing demand for video in the U.S. Federal Government. Vbrick's growth is due to its focus on pervasive video use cases, including live streaming and webcasts, video on-demand streaming, video content management, and video enhancement via transcription and computer vision.

Strengths

- Scalability
- Extensible across a wide variety of providers
- First-party eCDN capabilities
- Cloud and on-premises options
- Highly secure video delivery
- Cisco partnership and integration

Challenges

- Awareness outside of the U.S.

Innovators

Dialpad

Dialpad, based in San Francisco and led by Founder and CEO Craig Walker, has continued to focus on product innovation. In December 2021, Dialpad raised \$170 million in its Series F round, bringing its total funding raised to \$418 Million. On the product front, it repositioned UberConference, its conferencing service as Dialpad Meetings, which is now a fully featured video meeting platform.

Since the founding of Dialpad, its meeting offering has continued to be updated and innovated. AI-enabled transcription, ease of use, onboarding, and scalability have always been some of its most touted differentiators. After absorbing Highfive, Dialpad now has a fully expanded platform that includes an all-in-one bundle of web, desktop, and meeting room video conferencing. Dialpad supports 720p for video resolution.

Dialpad Meetings features an advanced real-time voice transcription, including transcript and key moment detection in real-time with speaker attribution, plus a full historical view that's accessible from the sidebar, and also action items for post-meeting follow-up.

Over the past year, Dialpad enhanced its Meetings solution with even more security with automatically generated random meeting links, plus the flexibility to enable waiting room on-demand, or automatically lock a meeting after a specified time.

From a user experience perspective, guests can now join on mobile without having to download an app or register for an account, providing feature parity and a user experience that is consistent with the desktop. Additionally, custom virtual backgrounds & 'surprise me' background settings + emoji reactions were added, along with a 5-minute reminder when the meeting is about to end. Other features include external picture-in-picture (PIP), and image sharing in Meetings chat.

In March 2022, Dialpad and Google announced that Dialpad Voice and Dialpad Ai Contact Center are now Chrome Enterprise recommended solutions. Dialpad and Google have a long history of working together, and this is evidence of that.

Strengths

- Ease of installation and onboarding
- Ease of use
- Ease of scalability via Google Cloud Platform (GCP)
- Seamless transition between any device, including "Move to TV"
- Dialpad AI (AI capability)
- Pricing simplicity
- Unlimited user licenses
- HD-quality voice and video
- Simplified user management
- High level of security
- Whiteboarding

Challenges

- Overall market awareness

Intermedia

Intermedia, led by CEO Michael Gold, has continued to grow and appears poised for an IPO in 2022. Intermedia offers its flagship AnyMeeting service that is part of its Intermedia Unite, its full UCC platform. Intermedia AnyMeeting supports 720P resolution, meeting recordings, custom branding, and Notes. It also offers an optional Webinar option. One of the newer capabilities is the ability to provide end-to-end encryption.

Intermedia Unite offers cloud-based telephony, messaging, and meetings. In November 2021, Intermedia announced that Intermedia Unite now has integrated Contact Center capabilities, which is a growing demand in the SMB space.

Intermedia continues to leverage its partnership with NEC, in which NEC resells Intermedia Unite as the NEC UNIVERGE BLUE CONNECT and ENGAGE. The services have been rolling out since the announcement. The NEC partnership provided Intermedia a major OEM partner and a large upgrade install base of NEC on-premise PBXs.

Intermedia offers integrations for Google Workspace, Microsoft Teams, and Slack. Intermedia Unite with Microsoft Teams offers bundled telephony, powered by Intermedia. Intermedia sells Unite and AnyMeeting via resellers, some of whom white label the offering with their brand. With focus on collaboration and communications offerings, its NEC OEM relationship allowing Intermedia to expand its global footprint, and a growing partner base through its differentiated CORE reseller program, Intermedia is well-positioned for the SMB and mid-market.

Strengths

- Cloud PBX
- Call center
- Mobile app
- Native CRM capabilities
- NextOS business communications suite

Challenges

- Market awareness

TrueConf

Based in Moscow, Russia, TrueConf has been focusing on adding new features and capabilities to its flagship video conferencing and collaboration platform TrueConf Server. In 2022, the company released its new TrueConf 2.0 meeting and messaging app for Android. New client apps for iOS, Windows, macOS, and Linux were launched as well. The vendor has a complete focus on self-hosted (on-premise) video conferencing, remote collaboration, and team messaging. TrueConf is known for its flexible freemium offerings as well. The premium solution features include LDAP, SIP/H.323 integration, offline operation, and support for UltraHD video resolution. TrueConf remains one of the few video conferencing providers to support 4K video, which is important in healthcare and government use cases.

For many use cases, TrueConf is ideal due to the fact that it can operate over a private network with no internet connection required. The solution features a built-in gateway for interoperability with clients' meeting room systems or standalone video conferencing endpoints. The company offers free SDK for enterprises who wish to embed video conferencing capabilities into their existing solutions as well.

In addition to PC, room, and mobile solutions for video meetings, the company offers TrueConf Kiosk software for self-servicing machines. These include ATMs, video kiosks at airports, and various smart city use cases.

Strengths

- Video system interoperability
- Private cloud offering
- Scalability and global reach
- Virtual meeting rooms
- Interoperability with Lifesize, LogMeIn, Skype for Business, Cisco Webex, and others
- Logitech, NVIDIA partnerships
- Global community of channel partners

Challenges

- Market awareness

uStudio

uStudio, based in Austin and led by CEO Jen Grogono has made its mark by focusing on overall media use cases for the enterprise. In 2021, uStudio added a new Chief Revenue Officer, Alex Mitchell. The uStudio Enterprise Media Platform offers both enterprise video and podcasts. uStudio focuses on sales enablement, learning, internal communications, and audio and video streaming. uStudio supports audio and video podcasting and video on-demand as well live video and audio streaming. In May 2021, uStudio launched guided coaching services, which help enterprises develop, plan, and execute a podcast service.

uStudio's podcast platform lets enterprises organize and deliver corporate audio and video content in a modern, mobile-first, and Netflix-style UX—helping to reach increasingly remote and hard-to-engage employees more naturally than the corporate intranet. One of the unique capabilities of uStudio is its white-label mobile app, which can be customized with numerous channels, shows, episodes, and targeted listener playlists, making it ideal for a number of use cases, including corporate town halls and sales coaching, onboarding, and learning. The custom mobile app allows enterprises to leverage their unique branding, which helps to drive engagement.

uStudio's native HTML5 interactive player and player framework allows for nearly infinite customizations, including the ability to wrap any open third-party player. uStudio now has one of the largest kits of video management APIs and Lightning components built for Salesforce. uStudio's growth is due to the focus on both employee and customer engagement, as well as the need for live and on-demand media.

Strengths

- Webcasting
- Scalability
- Deliver video anywhere
- Video analytics
- Customizable video platform
- uStudio for Salesforce integration for sales enablement

Challenges

- Awareness outside of the U.S.

Specialists

Adobe

Adobe continues to offer Adobe Connect 11 as its video conferencing platform for meetings, webinars, and virtual classes. In October 2021, Adobe released Adobe Connect 11.3, which includes smarter chats and polls, improved partner support for closed captioning, support for subtitling for MP3 and MP4 recordings and improved creating an off-line video from a Connect recording. The previous Adobe Connect 11.2 release brought new native applications for MacOS and Windows.

Adobe Connect continues to be a solid choice for webinars and virtual classrooms, as the two use cases where it offers strong functionality. Adobe Connect also has strong integration with the Adobe Experience Manager platform, and this makes Adobe an easy add-on for marketers. Adobe Connect also has a solid install base for virtual classroom due to its breakout rooms feature and its integrations with Adobe's eLearning solution suite—Adobe Captivate authoring tool and Adobe Learning Manager.

Strengths

- Webinars
- Virtual classroom
- HD video
- Security

Challenges

- Support for broader UCC and video conferencing rooms

Aragon Advisory

- Video conferencing is now intelligent, and enterprises need to evaluate providers and understand their forward-looking roadmaps.
- Based on use cases, it will be increasingly common for enterprises to have more than one provider of intelligent video conferencing.
- When evaluating video conferencing products, security capabilities cannot be overlooked. Security requirements may also limit choices.

Bottom Line

With hybrid work now the new normal, enterprises need better ways to collaborate from anywhere. Intelligent video conferencing is the new way forward. IVC is also becoming a key part of a digital work hub and it is a key component in an overall communications and collaboration platform. Meetings are expected to become more seamless and more integrated with team collaboration, which is increasingly offered as a bundle with IVC. Enterprises should carefully evaluate vendors to see where they are headed with their intelligence feature roadmap.

Aragon Research Globe Overview

The Aragon Research Globe graphically represents our analysis of a specific market and its component vendors. We use a rigorous analysis of each vendor using three dimensions that enable comparative evaluation of the participants in a given market.

The Aragon Research Globe looks beyond size and market share, which often dominate this type of analysis, and instead uses those as comparative factors in evaluating providers' product-oriented capabilities. Positioning in the Aragon Research Globe will reflect how complete a provider's future strategy is relative to their performance in fulfilling that strategy in the market.

A further differentiating factor is the global market reach of each vendor. This allows all vendors with similar strategy and performance to be compared regardless of their size and market share. It will improve recognition of providers with a comprehensive strategy and strong performance but limited or targeted global penetration, which will be compared more directly to others with similar perspectives.

Dimensions of Analysis

The following parameters are tracked in this analysis:

Strategy reflects the degree to which a vendor has the market understanding and strategic intent that are at the forefront of market direction. That includes providing the capabilities that customers want in the current offering and recognizing where the market is headed. The strategy evaluation includes:

- Product
- Product strategy
- Market understanding and how well product roadmaps reflect that understanding
- Marketing
- Management team, including time in the job and understanding of the market

Performance represents a vendor's effectiveness in executing its defined strategy. This includes selling and supporting the defined product offering or service. The performance evaluation includes:

- **Awareness:** Market awareness of the firm and its product.
- **Customer experience:** Feedback on the product, installs, upgrades, and overall satisfaction.
- **Viability:** Financial viability of the provider as measured by financial statements.
- **Pricing and packaging:** Is the offering priced and packaged competitively?

- **Product:** The mix of features tied to the frequency and quality of releases and updates.
- **R&D:** Investment in research and development as evidenced by overall architecture.

Reach is a measure of the global capability that a vendor can deliver. Reach can have one of three values: *national*, *international*, or *global*. Being able to offer products and services in one of the following three regions is the third dimension of the Globe analysis:

- **Americas** (North America and Latin America)
- **EMEA** (Europe, Middle East, and Africa)
- **APAC** (Asia Pacific: including but not limited to Australia, China, India, Japan, Korea, Russia, Singapore, etc.)

The market reach evaluation includes:

- Sales and support offices worldwide
- Time zone and location of support centers
- Support for languages
- References in respective hemispheres
- Data center locations

The Four Corners of the Globe

The Aragon Research Globe is segmented into four sectors, representing high and low on both the strategy and performance dimensions. When the analysis is complete, each vendor will be in one of four groups: *leaders*, *contenders*, *innovators*, or *specialists*. We define these as follows:

- **Leaders** have comprehensive strategies that align with industry direction and market demand and perform effectively against those strategies.
- **Contenders** have strong performance, but with more limited or less complete strategies. Their performance positions them well to challenge for leadership by expanding their strategic focus.
- **Innovators** have strong strategic understanding and objectives, but have yet to perform effectively across all elements of their strategy.
- **Specialists** fulfill their strategy well, but have a narrower or more targeted emphasis with regard to overall industry and user expectations. Specialists may excel in a certain market or vertical application.

Inclusion Criteria

This Globe looks at the overlapping categories of video conferencing and unified communications and collaboration. It will help clients navigate the intersection of video meetings, and UCC to look at the overall set of capabilities that support critical business use cases including the need for hybrid work.

The inclusion criteria for this Aragon Research Globe are:

- *Revenue:* A minimum of \$7 million in primary revenue for web and videoconferencing, or \$15 million in revenue in a related market, such as collaboration or UCC.
- *Shipping product:* Product must be announced and available.
- *Customer references:* Vendors must provide customer references in each region where they do business.
- Support for video conferencing.
- Support for mobile devices.

Aragon Research evaluates markets and the major technology providers that participate in those markets. Aragon makes the determination about including vendors in our Aragon Research Globes with or without their participation in the Aragon Research Globe process.

Inclusions and Exclusions for 2022

Inclusions:

- Intermedia

Notable Providers not included in this report:

- MediaPlatform
- PGi
- Poly