

Magic Quadrant for Contact Center Infrastructure, Worldwide

18 May 2015 ID:G00274754

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VIEW SUMMARY

Contact center infrastructure vendors continue to expand their solution offerings to include broader feature sets, including omnichannel routing, and alternative delivery models. Companies should evaluate vendors' technology and ability to deliver in relevant regions.

Market Definition/Description

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

Contact center interactions can be people-assisted or automated self-service, using Web chat or interactive voice response (IVR) and speech recognition technologies, for example, or can be a combination of assisted service and self-service. These channels for interaction use both live agents and messaging technology, and include voice, Web, email, instant messaging, Web chat, social media, video and mobile devices. Although there can be significant technology overlap between the CCI market and the CRM customer engagement center (CEC) market, the markets differ in three important ways:

First, solutions in the CCI market are often an extension of the unified communications (UC) technology portfolio. While these solutions can route multichannel interactions, voice and telephony tend to play an important role.

Second, while CCI solutions include the tools for integrating with CRM and other enterprise software packages, they do not typically include the functionality in their own solution stack.

Third, network performance and cost issues are often key elements driving architecture and solutions.

In contrast, CEC solutions are most frequently an extension of the CRM market, and while they also route multichannel interactions, they tend to focus on channels other than voice, and they support a high degree of focus on leveraging existing customer data to optimize interactions based on the customer's apparent desired outcome. These differences are significant in that they tend to result in separate decision processes driven by different decision makers within organizations, and there is currently very little overlap in the vendors appearing in "Magic Quadrant for the CRM Customer Engagement Center" and those appearing in this research. Over time, it is expected that the two solution sets will merge; however, that merging appears to be several years away.

Contact centers require a wide range of functions, architectures, features and services to be effective. Three major architectural approaches that are common in the market are integrated best-of-breed components, all-in-one bundled suites and cloud-based solutions.

CCI includes a wide range of related technologies, some of which are core to vendors' offering sets and some that are integrated through OEM or partnership relationships with best-of-breed providers. This breadth of technologies can include:

- Telephony infrastructure
- Multimedia contact routing and prioritization engines with real-time and historical reporting
- IVR and voice portals for self-service applications, including speech-enabled self-service
- Outbound dialing/proactive contact
- Virtual routing applications for multisite and work-at-home scenarios
- Presence tools
- Tools for integration with CRM software
- Data mart and analytics systems
- Computer-telephony integration (CTI)/Web services interfaces
- Email response management
- Web chat
- Collaborative browsing
- Social media
- Live and prerecorded video
- Knowledge-based self-service
- Workforce management scheduling tools
- Session recording and quality monitoring, including speech analytics
- Workflow routing and management

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EVALUATION CRITERIA DEFINITIONS

Ability to Execute

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

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

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

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

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

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

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

Completeness of Vision

Market Understanding: Ability of the vendor to understand buyers' wants and needs and to translate those into products and services. Vendors that show the highest degree of vision listen to and understand buyers' wants and needs, and can shape or enhance those with their added vision.

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

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

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

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

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

Increasingly, contact center managers prefer to purchase much, or all, of their CCI from a single source as a bundle in the pursuit of easier and enduring integration, cradle-to-grave integrated reporting and analytics, and easier system management. Therefore, leading CCI vendors offering complete portfolios of solutions, comprising their own products and those of partners and other strategic suppliers, are being favored.

The emerging contact center as a service (CCaaS) model — involving hosted, multitenant systems — is gaining attention as cloud approaches increase. There are no CCaaS-only providers that currently offer a substantial-enough global presence to warrant inclusion in this research; however, all vendors covered in this Magic Quadrant now provide some form of a hosted or CCaaS offering, either directly or through channel partners.

Magic Quadrant

Figure 1. Magic Quadrant for Contact Center Infrastructure, Worldwide



Vendor Strengths and Cautions

ALE

ALE (formerly Alcatel-Lucent Enterprise) is a Paris-based company that is 85% privately owned by China Huaxin and 15% owned by Alcatel-Lucent. ALE has condensed its contact center portfolio into two core platforms — OmniTouch Contact Center Standard Edition (OTCC SE) and OpenTouch Customer Service (OTCS). OTCS is a co-development partnership with Altitude Software, and also forms the foundation for ALE's multichannel cloud platform for the contact center.

Organizations committed to the OpenTouch strategy should consider ALE's contact center portfolio, especially if they prefer to source a solution set from a single supplier.

Strengths

ALE is an established brand for enterprise communications, especially in Europe, with a well-established channel partner program for selling and supporting a range of communications and contact center solutions.

It has a strong professional services organization to support its channel partners and customers in implementing and managing contact center solutions.

The vendor has laid out a clear strategy for consolidating its contact center portfolio into two key platforms for all market segments and all business models.

Cautions

While ALE has strategic co-development and licensing agreements in place with Altitude Software, ALE's execution of its contact center strategy would be negatively impacted if Altitude Software was acquired by a competitor.

While the acquisition of a majority stake in the company by China Huaxin is a positive direction, the lack of clarity of investment required to double the size of ALE's business in five years raises concerns over the ability to execute on its growth strategy.

ALE lacks a significant presence in North America, limiting its appeal to multinational companies

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

Geographic Strategy: The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.

with a strong need to support this market.

Altitude Software

Altitude Software is a Portugal-headquartered privately held company with majority interests from European investors. Altitude Unified Customer Interaction (uCI) is a platform-independent, multimedia contact center suite, and it is available as a premises-based or cloud offering. Altitude Software has customers across most vertical markets, and it has particular strengths in the business process outsourcing (BPO) and financial services markets. It has a strategic relationship with ALE for co-development of uCI, the core software behind OTCS.

Organizations with integration and workflow needs that desire a platform-independent contact center solution should consider uCI as a potential solution.

Strengths

Altitude Software continued development of Asterisk-based vBox is enabling it to increasingly offer PBX- and Internet Protocol (IP)-PBX-independent contact center solutions.

There is strong product and geographic synergy in the partnership with ALE, with minimal competitive overlap to minimize channel conflict for partners and customers.

Altitude Software has a pedigree of offering utility licensing as part of its solutions to the BPO sector, which positions it well commercially for the transition to Altitude Cloud for both BPO and enterprise customers.

Cautions

While Altitude Software has co-development and licensing agreements in place with ALE, the lack of equity investment in this important partnership could disrupt Altitude Software's contact center strategy if ALE was acquired by a competitor.

Despite investing in channels and growing management capabilities into European countries, Altitude Software lacks brand awareness of competitors to make shortlists for new opportunities.

Altitude Software's focus on the BPO sector overshadows opportunities for growth in its other vertical markets.

Aspect

Aspect, a U.S.-headquartered, privately held company, is owned predominantly by Golden Gate Capital and Oak Investment Partners. Since installing a new management team, Aspect has shown progress in revitalizing its business. Efforts have included investments in acquisitions and partnerships that have enhanced the vendor's solution offerings, as well as in improving its customer service delivery capabilities. These efforts have helped to reverse prior years of declining shipments and market shares. Aspect Unified IP offers a unified multimedia contact center application suite for midsize to large implementations, including several best-of-breed applications. The vendor also offers its cloud-based solution, Zipwire, targeting centers with fewer than 250 agents.

Consider Aspect when there is a need to integrate with multiple IP-PBX telephony environments, or when seeking to decouple the timing of your contact center and telephony investment decisions.

Strengths

Aspect's expansion of its solution portfolio and investments in customer service delivery show a reinvigoration of the business after the installation of a new senior management team over the past three years.

Aspect's considerable experience in contact center products and markets can be helpful to companies requiring that their system be customized to address business-specific needs, including those that require global coverage for sales and support.

Aspect has aggressively grown its hosting and managed service revenue business over the last two years, and has recently entered the cloud contact center space with its Zipwire offering.

Cautions

Aspect's service team has received mixed reviews from Gartner clients for several years in succession.

The vendor lacks an enterprise PBX installed base of its own into which to sell its products, and must attempt to sell into the PBX installed bases of other vendors, which is a challenging task.

As the vendor's installed base of legacy Aspect Call Center and Rockwell Spectrum automatic call distributors (ACDs) continues to age, Aspect becomes increasingly at risk of competitive displacement.

Avaya

Avaya is a U.S.-based privately held company with headquarters in Santa Clara, California. It is owned by private equity firms TPG and Silver Lake Partners. Avaya has multiple contact center platforms, each targeting a different part of the market. Avaya Aura Call Center Elite is for larger enterprises that have a voice-centric customer engagement strategy. Avaya markets Avaya Aura Contact Center (and the Avaya Contact Center Select variant for IP Office) for multichannel midmarket enterprises, and Avaya IP Office Contact Center for smaller businesses.

Enterprises of all sizes that have sophisticated requirements should consider Avaya's contact center offerings, which include several best-of-breed applications for contact center environments.

Strengths

Avaya has strong global coverage through its 1,000-plus partners, and holds the top market share position in contact center end-user revenue and agent shipments globally.

As part of its effort to penetrate the midmarket, Avaya is collaborating with Google on Avaya Aura and IP Office-based solutions, allowing agents to leverage a Chromebook and WebRTC-enabled interface.

Avaya Engagement Development Platform and Snap-ins enable developers to quickly create unique communications-enabled contact center applications and workflows.

Avaya Control Manager system management and partitioning capabilities enable enterprises to support multiple contact center applications from a single environment, while allowing user groups to control their own routing rules and customer data.

Cautions

While Avaya has been making significant investments in its cloud strategy, it continues to lag the market in public cloud sales.

Some Gartner clients requiring advanced functionality report that Avaya's omnichannel solution has limited out-of-the-box capabilities and requires a large amount of resources to configure.

Avaya charges significantly more for some of its disaster recovery licenses than some of its large competitors.

The vendor continues to receive a Caution financial rating from Gartner. Although Avaya is making improvements in its profitability, it needs to reverse the trend of revenue decline.

Cisco

Cisco is a U.S.-headquartered public company with shares traded on the Nasdaq stock exchange. Cisco's contact center offerings include Unified Contact Center Enterprise (UCCE), targeting large enterprises and those requiring advanced functionality; Packaged Contact Center Enterprise (Packaged CCE), targeting contact centers that have fewer than 1,000 agents and want a smaller IT footprint than the full UCCE solution; and Unified Contact Center Express (UCCX), targeting small to midsize centers with fewer than 400 agents. A fourth offering, Cisco Unified Intelligent Contact Management (Unified ICM) Enterprise, provides network-level routing and can support multivendor environments. Cloud-based Cisco solutions are also available through select channel partners on the vendor's Hosted Collaboration Solution (HCS) platform.

Enterprises that prefer an end-to-end network, telephony and contact center solution from a single vendor should consider Cisco's contact center offerings, as should enterprises with standard contact center requirements.

Strengths

Cisco has strong corporate brand recognition and a vast channel partner network, providing it with the opportunity to compete anytime an enterprise is looking at replacing its legacy contact center.

With the announcement of Cisco's Context Service (which provides cloud-based storage, tagging and management of interaction data), Cisco is helping companies provide a more integrated customer experience across their various business divisions and over multiple care channels.

Cisco UCCX, targeting the small to midsize business (SMB) market, is gaining market share through its bundling with the Cisco Business Edition 6000 telephony solution, and is adding more features, such as browser-based administration, HTTP and RESTful APIs for desktop and third-party integration, and predefined real-time and historical reporting.

Cautions

While Cisco's "Be the Best or Partner With the Best" strategy provides a robust solution through its core contact center offering, and those of its partners, for call recording, workforce management (WFM), knowledge management and support for nonvoice communication channels (for its UCCE offering), the combined offerings are not as integrated as the all-in-one suites and are more difficult to support.

Cisco contact center solutions work best in an all-Cisco environment, which can be problematic for enterprises wishing to utilize an alternative vendor/product, like Microsoft Lync, for their UC platform.

Very large enterprises should be aware that a single instance of UCCE can support a maximum of 12,000 inbound agents or 4,000 outbound agents.

Enghouse Interactive

Enghouse Interactive is a Canada-headquartered public company, with shares traded on the Toronto Stock Exchange. Enghouse Interactive has three distinct contact center offerings. Contact Center: Enterprise targets enterprise premises-based contact center environments and virtualized cloud environments. Contact Center: Service Provider targets service provider environments and very large enterprises (which use the product to offer contact center services to end users via the cloud). The third offering, Enghouse Interactive Communications Center, targets small to midsize contact centers.

Consider Contact Center: Enterprise when looking for a premises-based or virtualized multimedia contact center routing solution that can leverage a variety of IP-PBX and Microsoft Lync infrastructure environments. Consider Contact Center: Service Provider when looking for a multitenant enterprise offering for private cloud environments, or when seeking a platform from which to offer cloud-based solutions as a communications service provider (CSP). Consider Enghouse Interactive Communications Center when seeking a multichannel contact center solution for fewer than 500 agents.

Strengths

Enghouse Interactive's Contact Center: Enterprise and Communications Center offerings work well for companies looking to integrate their front-office contact center platform with their choice of back-office UC and telephony platforms.

Enghouse Interactive Communications Center offers a strong integration with Microsoft Lync UC solutions.

The vendor is investing in technologies that can span its market-specific offerings, including knowledge management, quality monitoring, dialer, IVR and some PBX integrations.

Cautions

Enghouse Interactive has yet to show substantial investment to increase its brand recognition among contact center decision makers.

The vendor's strategy of offering multiple, separate contact center products serving a variety of different markets dilutes its investments in developing and supporting its products and customers across these different markets.

Enghouse Interactive's lack of a consistent product offering set and presence across all geographies makes it difficult for it to meet the needs of large, global enterprises.

Genesys

Genesys is a privately held company, with headquarters in the U.S., and major private equity investment from Permira. Genesys supports three primary offerings based on its Customer Experience Platform. Genesys Premier Edition is a cloud-only offering targeting companies with fewer than 250 agents. Genesys Business Edition targets companies with up to 1,000 agents and is available as a cloud, on-premises or hybrid solution. Genesys Enterprise Edition targets companies of any size that require a rich feature set and strong levels of customization, and it is available as a cloud, on-premises or hybrid solution.

Consider Genesys for contact center solutions spanning a variety of levels of complexity and scalability, including those that require significant customization to address differentiated customer service needs.

Strengths

The vendor has a strong vision for decoupling contact center applications from telephony infrastructure; extending contact center capabilities into websites, mobile applications, UC environments and enterprise workflow beyond the contact center, and integrating social-media-based communications into structured contact center activities.

Genesys provides strong consulting and system integration services, either directly or through its professional services partners globally.

The vendor's "Omnichannel Journey Management" strategy of tracking a customer's entire interaction with an enterprise — from marketing and sales to customer service and support — and enabling all associated interactions to be consistent and relevant is resonating in the market.

Cautions

Genesys Enterprise Edition is often seen as more costly to implement and maintain than the solutions of its competitors.

The vendor's reputation for supporting highly complex deployments (often with a high price tag associated) causes some potential customers not to consider Genesys for midmarket and lower-complexity environments.

While Genesys has made improvements in removing complexity from its offerings to make them more palatable for midmarket companies and those not requiring the customization potentially available through its Enterprise Edition offering, those efforts are still a work in progress.

Huawei

Huawei is a privately held China-headquartered company, with shares held primarily by company employees. Huawei's e-Space contact centers run on its UAP6600 platform for large enterprise and CSP environments, U2990 for enterprises, and U2980 (which can be packaged as an all-in-one contact center appliance offering) for small to midsize contact centers.

Price-sensitive CSPs, enterprises and government agencies, particularly those in the Asia/Pacific region (especially China) and emerging economies, should consider Huawei when looking for cost-effective solutions.

Strengths

Huawei has strong data networking and telephony solutions for enterprises desiring to utilize a single vendor for all their communications needs.

The vendor has made substantial investments in appointing master distributors worldwide, particularly in Africa, Brazil and China, and in emerging economies in the Asia/Pacific region, Eastern Europe and Latin America — where it typically has well-developed relationships stemming from prior sales of telecom fixed and mobile network infrastructure.

With the addition of WebRTC support, Huawei's omnichannel capabilities continue to mature.

Cautions

While Huawei is expanding globally, over half of its sales are still in China and it has no plans to enter the North American market at this point.

The vendor needs to continue the expansion of its global support model, as well as its ecosystem for hardware and software upgrades for the enterprise market.

For enterprise deployments, Huawei relies on third-party integration, such as workforce and knowledge management, making implementation and support more complex than complete CCI suites.

Interactive Intelligence

Interactive Intelligence is a U.S.-headquartered public company, with shares traded on the Nasdaq stock exchange. Interactive Intelligence's Customer Interaction Center (CIC) offering provides an all-in-one suite of contact center applications across a wide range of scalability requirements. The vendor also is gaining market traction with its Communications as a Service (CaaS) single-tenant cloud-based option, with plans to release its PureCloud Engage multitenant cloud-based option in 2H15.

Enterprises looking for a tightly integrated set of contact center applications, or wanting to decouple the timing of their contact center and telephony investment decisions, should consider CIC.

Strengths

The CIC all-in-one application suite provides a common set of application development, management and reporting tools across a range of its applications, making the system particularly appealing to IT decision makers.

Interactive Intelligence continues to compete successfully for midsize and large contact center deals, and to grow its global customer base at a pace well above the market average.

The vendor is finding success in selling its CaaS offering in hosted and hybrid (on-premises and hosted) deployments in enterprises of various sizes.

Cautions

Despite making investments in its sales channel program to support enterprises outside North America, the vendor does not match the global coverage provided by some of its larger competitors.

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

The vendor's lack of an active/active georedundant architecture and reliance on Windows server platforms causes some large contact centers to shy away from its premises-based solutions.

Mitel

Mitel is a public company headquartered in Canada, with shares traded on the Nasdaq and Toronto stock markets. Mitel is rapidly expanding its contact center portfolio through the acquisition of Aastra and Oaisys. Mitel's broad portfolio includes MiContact Center Enterprise Edition, supporting a broad suite of applications and targeting North America; MiContact Center Solidus, supporting a broad suite of applications targeting Europe; and MiContact Center for Microsoft Lync, targeting enterprises with a Microsoft Lync UC strategy. The MiContact Center Business Edition is targeted for single sites with up to 50 agents, and the MiContact Center Workgroup offers a subset of the features available in the MiContact Center Enterprise Edition, targeting the SMB market with basic contact center requirements.

Consider Mitel solutions when looking to support contact center common functionality across a breadth of capabilities and for less than a few thousand agents.

Strengths

Mitel's contact suite is independent of the underlying telephony platform, and Mitel offers a fully integrated solution with Microsoft Lync, which it is leveraging as Lync continues to grow significantly.

With the acquisition of Oaisys, Mitel can provide a complete contact center suite including call recording, which can simplify the implementation and support required for a contact center.

Once focused almost exclusively on the SMB market, the vendor has increased the scalability and resiliency of MiContact Center Enterprise Edition to serve the large-enterprise markets that have a few thousand agents.

Cautions

Although the vendor launched a rebranding campaign in 2014, the Mitel brand still has limited brand awareness among contact center decision makers, compared to its larger competitors.

Mitel's broad portfolio of contact center products dilutes its investments in R&D, with a lot of resources focused on integrating the existing products versus developing new capabilities.

Some Gartner clients report that integration with third-party social media monitoring applications is difficult and provides limited functionality, compared to some of Mitel's competitors.

NEC

NEC is a public company headquartered in Japan, with shares traded on the Tokyo Stock Exchange. NEC's flagship multimedia contact center offering is Univerge 3C, supporting customers ranging from SMBs to companies with thousands of call center agents.

Enterprises that have an existing NEC telephony system, those leveraging big data in the contact center and those seeking an all-in-one solution for UCC and the contact center should consider NEC.

Strengths

Users in industry verticals such as hospitality, healthcare, education and government are attracted to NEC's industry-specific solutions.

NEC's Univerge 3C can run in conjunction with a variety of the vendor's telephony offerings, enabling enterprises to have an all-in-one communications solution.

NEC has a strong global presence and supports over 20 languages.

Cautions

NEC's marketing in North America is not as robust as its competitors, and brand recognition for NEC's contact center solutions is lagging in the market.

The vendor's contact center portfolio sales are primarily targeted at enterprises with significant existing NEC telephony environments. Gartner sees limited results from NEC's attempts to broaden the appeal of its contact center solutions in order to displace other vendors.

Gartner clients report that NEC's omnichannel capabilities are limited, and integration into third-party knowledge management solutions is difficult.

Presence Technology

Presence Technology is headquartered in Spain and is a privately funded company owned by the private equity division of Valora. Presence Suite is a portfolio of multimedia modular contact center applications that are primarily deployed as a stand-alone capability with Presence OpenGate telephony engine, or as an adjunct to Avaya Aura Communication Manager. While Presence Suite has been most referenceable in BPO, it is increasingly focusing on financial, insurance and healthcare verticals with inbound and Web customer service.

Organizations looking for a platform-independent solution with particular strengths in scripting and workflow capabilities should consider Presence Suite as a contender.

Strengths

Presence Technology is executing well on its planned growth and expansion initiatives into the Americas and Africa from its Iberian base.

While historically known for its integration with Avaya, Presence Technology now secures the majority of its business with Presence OpenGate, a SIP-based telephony engine that enables it to scale to 2,000 concurrent seats.

Scripting and workflow have long been strengths in the vendor's offerings.

Cautions

Presence Technology's cloud strategy lags its larger competition because of challenges with securing long-term channel partnerships. It plans to launch its own cloud platform later in 2015.

While its expansion under challenging market conditions is impressive, the vendor is smaller than most of its competitors and lacks broader brand awareness, limiting its ability to be included for consideration unless suggested to the customer by one of its channel partners.

Increasing its size through inorganic growth will be challenging unless its owners are prepared to be more acquisitive.

SAP

SAP is headquartered in Germany and is a public company, with shares traded on the Frankfurt and New York Stock Exchanges. SAP targets the CCI market as part of SAP Labs, a division through which SAP drives its R&D investments. SAP Contact Center is positioned as a function of SAP's recently formed Customer Engagement and Commerce business unit for delivering omnichannel customer engagement integrated with the broader set of SAP's business application and SAP Cloud offerings.

SAP Contact Center is a stronger fit for organizations committed to the SAP business application suite and SAP Cloud offerings, while it is also a consideration for organizations looking for a stand-alone, multichannel contact center suite.

Strengths

As part of SAP Labs, the contact center software division enjoys a level of autonomy to operate as an independent business, while leveraging the brand of a leading business application software provider.

SAP Contact Center is a scalable suite with multitenant properties by way of virtual units, which aligns it well with SAP Cloud, which is primarily based on the vendor's Hana platform.

The positioning of SAP Contact Center as a function of the Customer Engagement and Commerce business unit strengthens the CCI proposition to customers of SAP's broader portfolio of software.

Cautions

As the contact center business unit is a part of SAP Labs, there is minimal external investment into expanding the contact center portfolio as a stand-alone capability, so it must rely almost wholly on organic growth as an attachment to business applications.

Tighter integration with SAP for the omnichannel customer experience weakens the stand-alone proposition for partners and customers that are not committed to SAP for customer service.

SAP Contact Center software runs on its own platform separate from the SAP Hana platform. This requires that the contact center cloud be developed independently, limiting economies of scale for organizations committed to Hana for SAP applications.

Unify

Unify is a Munich, Germany-headquartered privately owned joint venture between private investor The Gores Group and Siemens. OpenScape Contact Center Enterprise is the flagship, multichannel platform for midsize to large organizations with up to 7,500 users. OpenScape Enterprise Express is an all-in-one solution for up to 50 agents. Unify also has a partnership with inContact for its OpenScape Cloud Contact Center offering. OpenScape Contact Center Agile is positioned for small and midsize deployments of less than 100 agents, and OpenScape Contact Center Campaign Director is for outbound and telemarketing activities.

Organizations committed to, or considering, the Unify portfolio should consider OpenScape Contact Center Enterprise as a contender for OpenScape or legacy HiPath infrastructures. OpenScape Enterprise Express is a good contender for stand-alone on-premises deployments. OpenScape Cloud Contact Center is an option when seeking an independent CCaaS offering.

Strengths

Unify has undergone positive changes in management since the rebranding of the vendor, coupled with maintaining the marketing energy and brand awareness associated with its Circuit unified communications and collaboration (UCC) environment.

OpenScape Enterprise Express is a suitably packaged for customers with up to 50 contact center agents and offers an easy migration to OpenScape Contact Center Enterprise.

Unify has a global professional services team to help implement and support its portfolio of contact center solutions through partners.

Cautions

Some European Gartner clients indicate that the restructuring of Unify's business — announced in June 2014, and generally seen as a necessary step — has had a detrimental effect on the quality of field support.

OpenScape Contact Center Enterprise progresses toward platform independence with preferred devices, but the suite still requires separate appliance servers for contact center, voice portal and outbound dialer.

OpenScape Cloud Contact Center is currently based on a partner platform from inContact, which makes migrating existing OpenScape Contact Center Enterprise customers to the cloud more challenging.

Vocalcom

Vocalcom is a France-headquartered privately owned company, with Apax Partners as a majority shareholder. It has renamed its product portfolio as follows: Vocalcom Cloud Contact Center (formerly Hermes.EC3); Vocalcom Cloud Contact Center for Salesforce (formerly Hermes.Cloud); Vocalcom Virtual Contact Center (formerly Hermes.Net) and Vocalcom Virtual Contact Center for Avaya.

The contact center suite solutions are offered primarily as cloud-based solutions, but can also be deployed as on-premises-based, perpetual-licensed solutions. Vocalcom Cloud Contact Center solutions can be

deployed in Amazon Elastic Compute Cloud (EC2) or Salesforce's Force.com cloud infrastructures. Vocalcom retains its strength in the BPO market, as an adjunct to Avaya Aura Communication Manager, but it is also expanding into new territories with new management and channel development.

Organizations looking for a platform-independent suite solution or for cloud deployment should consider the Vocalcom portfolio as a contender.

Strengths

Vocalcom's Cloud Contact Center solutions demonstrate Vocalcom's visionary and early-to-market approach for the next generation of cloud architecture.

The vendor is executing with tangible growth from a program of expansion outside of its core markets of France, the Middle East and North Africa, Spain, and Brazil.

Vocalcom's pedigree in offering solutions on a utility license basis to outsourcers positions the vendor well for transitioning its enterprise customer base to one of the vendor's Cloud Contact Center platforms.

Cautions

Vocalcom's strength in the BPO market overshadows awareness of its customer services and multichannel capabilities.

While Vocalcom claims to have overcome the challenges of using Amazon Web Services (AWS) to host core contact center software for its Vocalcom Cloud Contact Center solution, the distribution of resources between AWS and its own data center infrastructure can impact end-to-end service levels.

While Vocalcom claims scale to 5,000 seats with the current 5.1 version of the platform, and 10,000 seats with v.5.2, its largest reference customers are not larger than 2,000 seats.

ZTE

ZTE, headquartered in China, is a public company trading on the Hong Kong Stock Exchange. ZTE's Next Generation Call Center (NGCC) suite supports highly scalable multimedia contact center capabilities, with strength in supporting both inbound and outbound operations in either cloud- or premises-based configurations. Its AnyService@ZXNGCC multimedia unified contact center product is based on its ZXMSQ10 SoftACD switch and system, or its ZXNGCC all-IP-based contact center switching solution. In 2014, the company also launched its ZXQ20 appliance-based all-in-one contact center solution targeting small and midsize contact centers.

Consider ZTE's NGCC suite for deployments in China and in emerging economies, particularly when the requirement is for price-competitive solutions that scale to thousands of agents (for example, in CSP and contact center BPO environments).

Strengths

ZTE's NGCC suite is designed for CSPs to provide multiple multitenant virtual centers for its enterprise customers, especially for call center service outsourcing.

NGCC can be deployed as an all-software solution running on a next-generation network softswitch or IMS network for greater efficiency in CSP environments.

The vendor's strength in the contact center market lies in selling NGCC as a platform for CSPs, channel partners and network integrators to offer multitenant hosted or cloud services for enterprises and outsourcers.

Cautions

ZTE continues to have limited ability and experience in providing enterprise contact center solutions outside of China, neighboring Asian countries, and parts of the Middle East, Africa and Latin America, where it is established.

It can be difficult to find enterprise-focused ZTE channel partners or CSP partners with a strong understanding of the best practices used in contact center environments, particularly in emerging countries.

The vendor's appliance-based, bundled contact center offering for small to midsize contact centers is new to the market, and potential users should validate their supplier's experience with the product and check for local reference customers.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, 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 of a change of focus by that vendor.

Added

No vendors were added this year.

Dropped

No vendors were dropped this year.

Honorable Mentions

The following vendors are not included in this research because they have a predominance of their shipments in a single country, or do not meet other inclusion criteria. However, they are appropriate for certain situations and sometimes compete against the vendors that are covered in this Magic Quadrant:

Noda is a privately held company with headquarters in Russia. The vendor's Noda Contact Center (NCC) and NCC Lite offerings support PBX functionality, along with a wide range of contact center applications, and targets companies with 100 to 2,500 agents in Russia and other Eastern European markets, as well as the Philippines.

Drishti-Soft Solutions is a privately held company based in India. The vendor's Ameyo contact center offering provides a cost-effective, yet feature-rich, suite of contact center capabilities. Drishti-Soft currently sells primarily to outsourcers and e-commerce (aka "consumer Internet") companies, although it has customers in other industry verticals as well. The company sells primarily in India and other emerging markets in the Asia/Pacific region, and is beginning to grow a more global presence.

Collab is a privately held company headquartered in Portugal, with Novabase as a majority shareholder. Its OneContact offering targets contact centers requiring a breadth of functionality at an affordable price. The vendor sells in parts of Western Europe, the Middle East, Africa and Latin America, with particular strength in the telco, banking and e-government vertical markets.

Inclusion and Exclusion Criteria

To appear in this Magic Quadrant, vendors had to meet all the following criteria:

Market share among the top performers in at least one geographic region in 2014 (see "Market Share: Contact Centers, Worldwide, 2014") 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 CCI portfolio areas defined in this research. At a minimum, offerings must include multimedia contact routing and prioritization, IVR or voice portal capability, and CRM integration tools.

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

Evaluation Criteria

Ability to Execute

Gartner analysts evaluate CCI technology providers based on the breadth, quality and overall maturity of their applications, customer support capabilities, and ability to deliver solutions that enable contact center operations in formal contact centers in midsize to large enterprise contact centers. Ultimately, CCI technology providers are judged on their ability and success in capitalizing on their vision.

Table 1. Ability to Execute Evaluation Criteria

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

Source: Gartner (May 2015)

Completeness of Vision

Gartner analysts evaluate CCI technology providers based on their ability to convincingly articulate logical statements about current and future market directions, innovations, customer needs, and competitive forces, and how well these map to Gartner's overall understanding of the marketplace. Ultimately, CCI technology providers are rated on their understanding of how market forces can be exploited to create opportunities for providers and their clients.

Table 2. Completeness of Vision Evaluation Criteria

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

Source: Gartner (May 2015)

Quadrant Descriptions

Leaders

Leaders are high-viability vendors with broad portfolios, significant market share, broad geographic coverage, a clear vision of how contact center needs will evolve and a proven track record of delivering contact center solutions. 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 of deployment failure.

Challengers

Challengers are vendors with strong market capabilities and good solutions for specific markets. However, overall, their products lack the breadth and depth of those in the Leaders quadrant. 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 or Internet Protocol (IP) telephony.

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.

Context

The contact center market is entering an innovative and dynamic phase in which multiple forces are impacting purchase and deployment decisions in new ways. CCI purchases have traditionally been closely linked to a company's chosen telephony vendor. Even today, traditional PBX vendors make up more than 60% of agent shipments among the top 10 global market share holders. However, this is down from 83% five years ago.

One factor driving the decoupling of CCI from telephony infrastructure is that, as companies increasingly tie their telephony decisions to their broader UC strategies, they often are looking for their CCI purchase to allow them flexibility of deployment should their UC strategy draw them away from their existing telephony vendor. A prime example of this is seen when companies are planning to evolve their UC strategies to be focused around Microsoft Lync over the coming years. Because Microsoft does not currently offer its own CCI solution, contact center decision makers and planners may opt to select a CCI solution from a company whose enterprise communications application business is not heavily tied to an enterprise telephony or UC product line.

A second significant factor that can drive the decoupling of CCI and telephony/UC purchases is the increasing propensity of CCI decision makers to consider, and often select, CCaaS offerings as a replacement for premises-based solutions. In some cases, these decisions will be driven by the aforementioned desire to decouple a company's CCI and telephony/UC decisions. In other cases, it is driven by other factors, including the desire to switch from a capital expenditure acquisition model to an operating expense model and the potential for a lower total cost of ownership; the need to scale license usage up and down to match seasonal staffing demands; the need for more rapid deployment; and/or a desire to focus investments and staffing on core business products and services.

The contact center market is also evolving from a focus on discrete, one-off customer interactions using a variety of communications silos to a more integrated and holistic view of customer activities and workflows in recognition that a customer may engage in a variety of different activities (some, but not all, involving communications with the target company) in the course of completing a customer journey. The compilation of discrete interactions and customer journeys, in turn, impacts a customer's overall experience with a company. This focus on context-aware, multichannel (including social media), reactive and proactive interactions is shaping the evolution of the contact center to the CEC. This change in focus is in the early phases of adoption and, at present, there is more vendor hype around this trend than there is actual customer service transformation taking place. However, as phone-based customer service is declining in popularity relative to other communications channels, many mainstream technology adopters are at least in the planning phases for more effectively orchestrating their various customer interaction channels toward a more convenient, cohesive and consistent customer experience.

The drive toward evolving the contact center to becoming a customer-experience-centric CEC is adding additional dynamics to the contact center market in the form of companies beginning to alter their evaluation and selection of vendors to provide nonvoice channels (email, Web chat, video chat, social, etc.) to their customer service environments. Over the past five to 10 years, many enterprises have looked either to their CRM vendors or to best-of-breed specialists to provide these customer interaction channels. One reason for this was because the vendor could support interactions that were more customized to individual customers based on their inherent integration with customers' CRM records. A second reason was because these vendors could better support automated or partially automated interactions across these channels, often aided by a more robust knowledge management capability to support detailed and individualized responses. However, voice-based interactions continue to make up a significant portion of interactions in contact centers today. As such, as companies look to evolve their customer support to become more customer-centric across all interaction channels, some are recognizing the potential benefits of acquiring both their voice and nonvoice channels as a package from a single vendor — and very few CRM vendors support phone-based-assisted customer service. Benefits include leveraging a consistent business rule management capability for routing, queuing and escalating the interactions across channels, thus enabling a company to prioritize the handling of their best customers regardless of the customers' chosen channels. Obtaining all of the interaction applications from a single vendor also makes it easier for companies to manage reporting and staffing across channels, rather than having to integrate operational performance data across separate systems.

Many of the leading "traditional" contact center vendors are adding both knowledge management capabilities (for enhanced multichannel self-service) as well as interaction orchestration capabilities (to better leverage customer context from multiple enterprise data sources and support customer journeys across interaction channels) to their application suites. While these solutions are still in the early stages of adoption, they are beginning to create a challenge to the more common decision path of obtaining the nonvoice channels from CRM vendors or from best-of-breed specialists.

The integration of workforce optimization (WFO) capabilities under the umbrella of contact center application suites is further along in the evolution toward expanding the breadth of capabilities than the progress seen in the integration of nonvoice channels. WFO solutions have traditionally been purchased as point solutions in the WFO application stack (e.g., from separate WFM, recording, quality assurance, analytics, e-learning vendors, etc.) or from vendors offering integrated WFO suites. However, in recent years, a number of leading CCI vendors have added functionality to their application suites that can now rival the offerings of WFO specialists, at least for meeting the needs of companies needing midlevel functionality, and, in some cases, rivaling the WFO specialists in delivering high-end WFO capabilities. It should be noted, however, that even those CCI vendors that have incorporated WFO capabilities into their application suites will also support tight integrations to the WFO specialists, as the majority of the installed base requires support for these integrations.

Market Overview

The dynamics shaping the global CCI market vary by region. The market is largely mature in North America, Western Europe and portions of the Asia/Pacific region, where most sales involve expanding or replacing existing systems. The North American and Western European markets combined accounted for nearly 60% of agent shipments globally. However, CCI is still an emerging technology in many geographic regions. In many countries, this market is forecast to grow at double-digit rates, compounded annually, through 2019 (see "Forecast: Contact Centers, Worldwide, 2012-2019, 1Q15 Update").

Overall, worldwide contact center agent shipments declined by 7.1% in 2014 (see "Market Share: Contact Centers, Worldwide, 2014"), following lesser year-over-year declines in the prior two years. The decline in agent shipments in 2014 was driven in part by a generally soft economy in a number of regions, with many companies opting to continue to defer CCI investments in the near term. Other factors slowing global investments in CCI include: (1) growing adoption and planned adoption of CCaaS solutions, particularly in North America and Western Europe; and (2) investments in nonvoice channel self-service and assisted-service solutions acquired as extensions of CRM systems, rather than bundled with CCI solutions.

Regional performance was mixed, ranging from more than 30% growth in the Middle East and Africa to low double-digit declines in Japan, North America and Western Europe.

The worldwide contact center market also showed a 10.4% decline in end-user spending. The global market accounts for more than \$1.7 billion in total end-user spend. The decrease in spending was impacted both by a decline in agent shipments and increased price discounting relative to that seen in 2013.

The market has traditionally been dominated by the leading vendors in the enterprise telephony market — a market that has also experienced some consolidation in recent years. However, market barriers are not so high as to prevent other vendors from entering. Avaya, Cisco and Genesys accounted for more than 55% of global agent shipments in 2014, despite all three showing shipment declines year over year. The rest of the top 10 market share holders in terms of agent shipments in 2014 were Huawei, Mitel, Enghouse Interactive, Aspect, NEC, Interactive Intelligence and Unify, respectively, combining to represent 26% of the global market. Some smaller players continue to find defensible market niches through geographic or vertical market specialization, low price, or differentiating technologies.

CCI solutions have traditionally been hardware-centric, but most vendors' solutions are now shipped as software that the customer can run on properly configured commercial off-the-shelf servers, although some still require proprietary components. The majority of shipped solutions are based on Internet standards, including TCP/IP and SIP.

The market has been consolidating over time, and incumbent vendors are looking to expand their solution portfolios to incorporate additional capabilities that commonly play a role in contact center ecosystems. These capabilities include IVR, outbound dialers, contact center workforce management, recording, e-learning, Web chat, email response management, live and prerecorded video, desktop collaboration, analytics, workflow, and mobility. This creates challenges to vendors that grow through acquisition or that develop their offering sets as a collection of separate, point solution offerings, in that a portfolio approach (rather than a more tightly integrated suite approach) results in an environment in which customers must manage and administer component systems separately. We are seeing more vendors offer bundles intended to simplify the purchase, configuration and implementation of their offering sets for the benefit of their sales channels, customers and prospects.

Similar to trends seen in 2014, in 2015, trends influencing the planning and deployment of enterprise CCI include:

Continued infrastructure consolidation and centralization projects among companies that operate multiple contact centers — These companies want to leverage the location-independent nature of IP-based infrastructure to reduce duplication of infrastructure investments. In response to this trend, most vendor solutions now support VMware or Hyper-V for system virtualization.

Momentum for multimedia routing and self-service, including email response management, Web chat and customer collaboration solutions — These solutions, traditionally purchased from best-of-breed or point solution providers, are now increasingly being evaluated within the portfolio of the traditional automated call distributor vendors.

Increasing awareness and adoption of cloud-based CCI deployments — Gartner has seen a steady increase in client interest in cloud-based deployments, ranging from CCaaS solutions to company-dedicated hosted solutions. Once primarily the realm of deployments of 75 agents or fewer, these solutions are increasingly gaining adoption in environments with up to several thousand agents. These solutions have also evolved from providing only basic call routing to supporting complex customer routing schemes, including those supporting multiple media and sophisticated customer segmentation. Most vendors covered in this Magic Quadrant provide CCaaS or hosted contact center functionality, either directly or through partners.

Contact center WFO functionality — Once almost solely limited to point solution providers, WFO functionality is now included in many CCI suites or portfolios. This functionality encompasses varying combinations of contact recording, agent evaluation, workforce management, coaching and e-learning tools, postcontact surveying, and agent performance speech analytics.

Evolution from contact center to CEC orientation — For well over a decade, vendors and end-user companies have talked about the need to look at customer interactions from the customers'

point of view and in the context of the goals they were seeking to achieve through a broad set of activities. With the emphasis on sales and marketing activities, this thinking has evolved in large part due to the emergence of other trends, such as multimedia traction, integration with social media engagement tools, mobile device support, big data analytics, proactive communications and workflow (among others), and has taken on the moniker of "customer engagement." However, it should be noted that, in many organizations, the breadth of customer interaction channels are not under the auspices of a single group, making it difficult to coordinate customer experience management across all channels.

Increasing awareness of social media's potential impact on contact center operations —

Many companies are now considering the potential impact of social-media-based interaction on customer service activities, although actual adoption of social CRM solutions in contact centers remains limited to primarily companies that take a more aggressive approach to technology adoption.

Emerging interest in integration with Microsoft Lync — Many companies have significant investment in Microsoft Lync user licenses and IT support knowledge, and they are looking for ways to leverage these investments beyond their enterprise UCC deployments and into their contact center deployments. Despite vendor hype, few companies are integrating enterprise rich-presence capabilities in their contact centers, which would allow agents to pull non-contact-center subject matter experts into contact center customer interactions. Instead, many companies are focusing on the expected eventual maturity of Lync as an enterprise voice/IP telephony platform, at which point these companies foresee the potential for Lync to be the voice and multichannel routing infrastructure to which their contact center applications would need to integrate.

Leveraging the contact center routing capabilities to support back-office workflow —

Organizations in vertical markets, such as insurance and government agencies in which customer contacts frequently initiate process-intensive workflows, are beginning to investigate how they can extend the prioritization, routing and tracking capabilities of their CCI. These capabilities can range from managing customer contacts to managing the follow-up tasks associated with those contacts, to ensure their completion within defined service-level agreements and targets.

Growing interest in adding tighter linkage between customer service operations and mobile applications —

Mobile applications can provide customers with easier access to self-service information by supporting a visual interface to option selections and data that previously were available only to those accessing the company using a more traditional computer interface. These solutions can also provide customers with additional information and options based on real-time information regarding contact center operations, such as expected wait times and callback options. Mobility can also be used for internal-facing applications, such as providing real-time and historical performance dashboards and access to staffing and monitoring capabilities, while the contact center manager or director is away from his or her desk.

Many companies fitting a mainstream or conservative technology adoption profile have begun to embrace the use of multimedia customer communications. While email routing and response management have traditionally been companies' nonvoice channels of choice to add to their contact center, Gartner has noticed a recent increase in the rate of adoption for Web chat functionality in contact centers, particularly in mature regional markets such as North America and Western Europe, and in mature country markets such as Australia and China. Companies with more aggressive technology adoption profiles have begun to embrace rich presence to incorporate subject matter experts directly into customer service processes. Technologies such as video and desktop collaboration with customers remain niche functionalities in CCI, with limited and specialized commercial deployment. Regardless of their companies' technology adoption profiles, contact center planners should review Gartner's "Hype Cycle for Contact Center Infrastructure, 2014" to help develop roadmaps for the incorporation of new technologies into their environments to address customer relationship strategies. In some cases, this may involve evaluating the ability of a system to provide a wide breadth of functionality, not all of which may be implemented at the time of the system's initial deployment.

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