

# Critical Capabilities for Unified Communications

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Changes to the ways people work together are redefining how IT leaders should assess the product capabilities of unified communications providers. This is placing an increased focus on single-vendor platforms to meet the majority of core UC functional requirements.

## Key Findings

- Unified communications (UC) suite solutions have matured, but vendors still need to augment core capabilities with other products for scale and functionality.
- Desktop and mobile videoconferencing are becoming increasingly key components of UC solutions, as is the integration of desktop solutions with group video systems.
- Emergent cloud-based workstream collaboration services are very competitive with current on-premises-oriented UC solutions and can create conflicts, especially when both are offered by the same vendor.
- End-of-support notices for legacy PBX platforms, as well as the desire not to invest in new IP-PBX platforms, are driving interest in UC suite solutions both on-premises and in the cloud.

## Recommendations

IT leaders should:

- Carry out a discovery exercise based on user analysis to understand how communications and collaboration needs are changing — especially related to telephony — to decide if the capabilities offered by your proposed UC vendor are good enough to drive a single-platform approach.
- Evaluate hybrid solutions of blended on-premises and cloud capabilities when there is greater demand for collaboration with external parties, or when WAN capacity limits the broader adoption of internal multiparty sessions.
- Use a bimodal IT approach to managing current-generation UC solutions and the emerging next generation of workstream collaboration tools.

## What You Need to Know

As with previous years, this year's focus for this Critical Capabilities for Unified Communications includes a reassessment of some capability ratings against revised definitions, especially where we have combined some capabilities and introduced others. Therefore, it is inappropriate to compare this year's performance with last year's ratings to define progress. It is also important to realize that this research into vendor and product capabilities is a snapshot in time of what technology providers have launched at the time of publication. It does not include forward-looking plans for new developments, but will include products that are in the process of controlled introduction at the time of publication.

In our analysis, all of the vendors listed in the companion "Magic Quadrant for Unified Communications" have all of the core UC capabilities:

- Telephony
- Conferencing
- Instant messaging and presence
- Client (user interface)

However, not all of these have been tightly integrated into a single suite. In some cases, vendors use partners to complete a total solution or, in other cases, they use application programming interfaces (APIs) and standards to integrate separate products.

Both of these have been useful strategies for adding capabilities to established platforms in place of a rip-and-replace approach. However, we are increasingly seeing a need for organizations to replace legacy telephony platforms (both PBX and IP-PBX). This places a stronger focus on an encompassing set of telephony requirements to meet the broadest set of user requirements, in addition to the need for tightly integrated suite capabilities. Collectively, we anticipate that this will offer a more intuitive user experience as well as address the need for lower total cost of ownership (TCO) of maintaining separate product platforms. In this year's Critical Capabilities research, we have made the following changes to critical capabilities

**Clients:** Now includes mobility where the majority of focus now is on a mobile-first development for user experience.

**Telephony:** Now includes messaging, where the focus is on voice and unified messaging. These are now generic, undifferentiated capabilities that are becoming less important and no longer justify a dedicated critical capability.

**Workstream Collaboration:** Has replaced continuous UCC where we now have a stronger definition for this embryonic collaborative work model (see "Hype Cycle for Unified Communications and Collaboration").

Organizations should continue to select an anchor vendor for their UC environments, because this will offer a more consistent user experience, with a lower TCO than maintaining integration with competing suppliers. However, taking into account how user requirements are different, it is equally

important to consider integration and interoperability, where a multivendor environment is still required.

UC is, in most cases, a Mode 1 initiative within a bimodal IT strategy (see "Leverage Bimodal IT Methods to Advance UCC"). UC platforms are sourced, managed and supported as a core IT responsibility. Although this is a formula that both suppliers and customers are comfortable with, the opportunity to address Mode 2 bimodal IT initiatives will be increasingly important in addressing user requirements and group collaboration requirements. Organizations should view workspace collaboration as a Mode 2 initiative.

## Analysis

This research is intended to help organizations define their requirements and select specific products that match their needs as aligned with one of our use cases. This research provides an overview of the UC products of the vendors included in the "Magic Quadrant for Unified Communications."

It evaluates their effectiveness in addressing users' needs in four use cases:

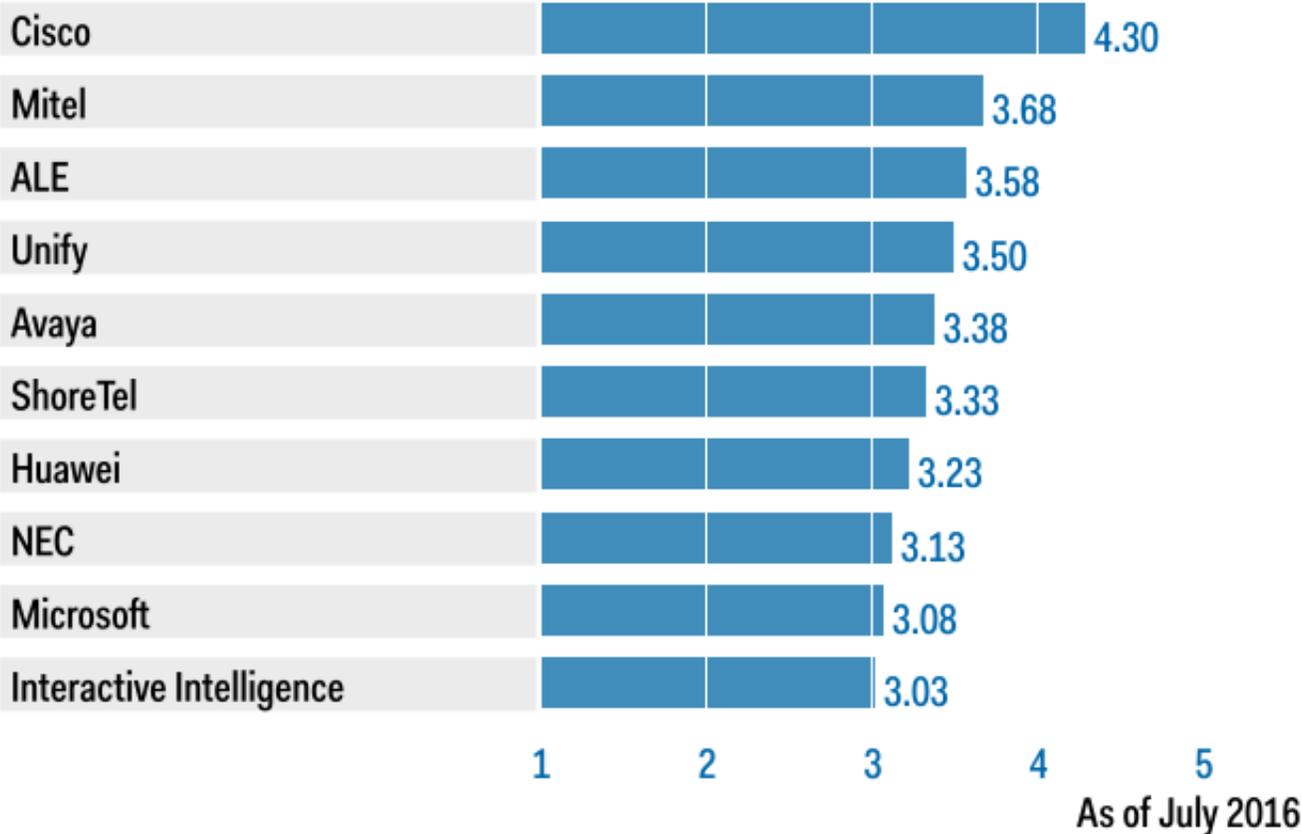
- Full UC with strong telephony
- Full UC with strong collaboration
- Full UC for midsize organizations
- Ability to offer hybrid solutions

This research differs from the "Magic Quadrant for Unified Communications" in that its focus is on each product's capabilities at the time of publication, rather than on the broader set of evaluation criteria for vision and execution used in a Magic Quadrant. This research is intended to help organizations assess product capabilities against a set of user requirements aligned with one or more of our defined use cases.

Critical Capabilities Use-Case Graphics

Figure 1. Vendors' Product Scores for the Full UC With Strong Telephony Use Case

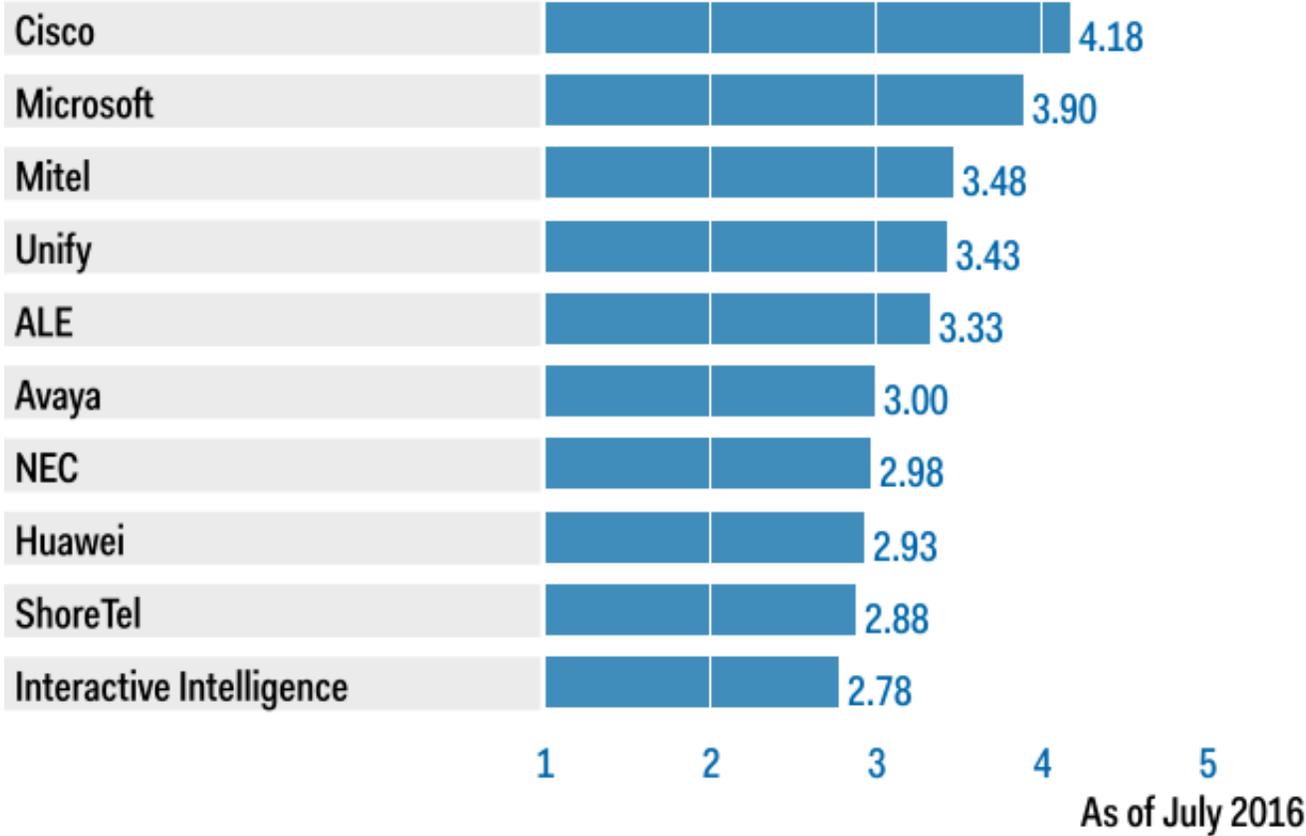
Product or Service Scores for Full UC With Strong Telephony



Source: Gartner (July 2016)

Figure 2. Vendors' Product Scores for the Full UC With Strong Collaboration Use Case

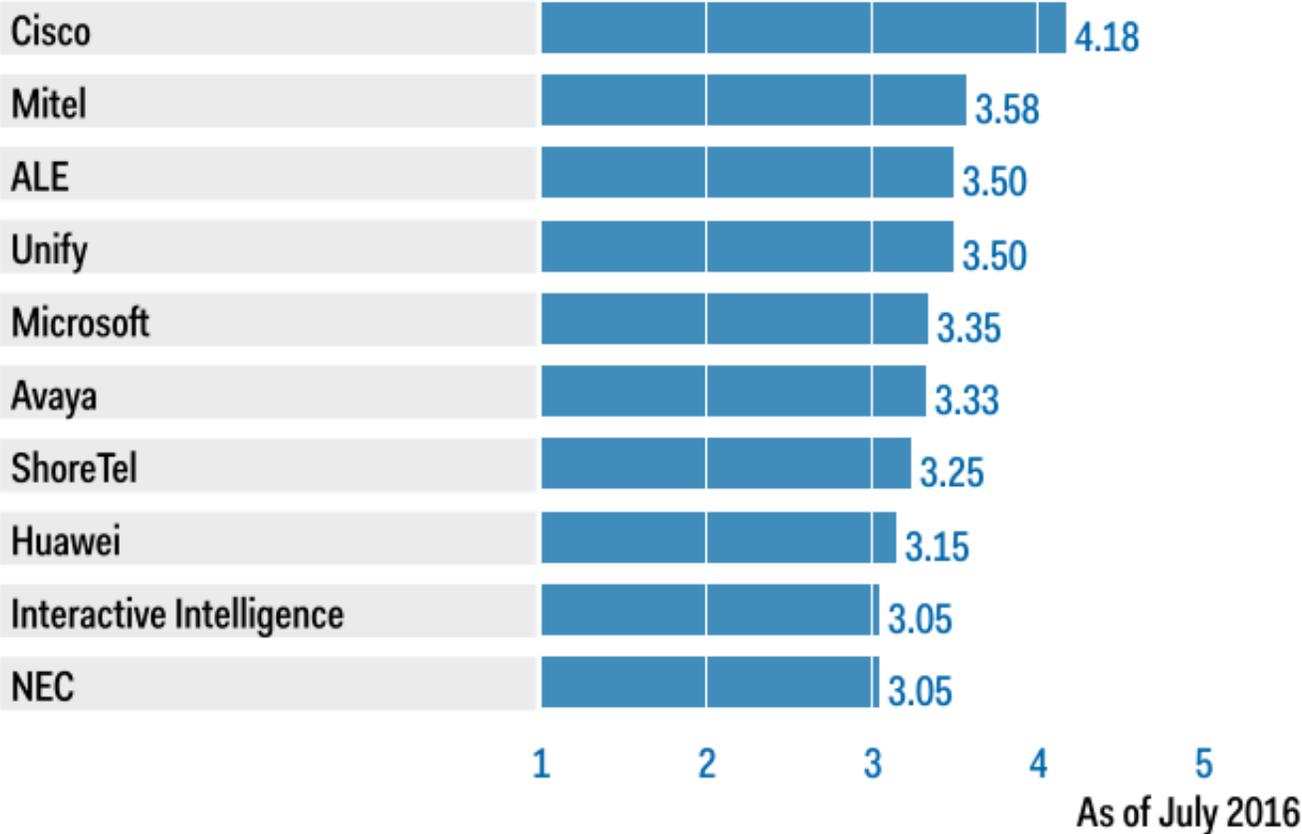
Product or Service Scores for Full UC With Strong Collaboration



Source: Gartner (July 2016)

Figure 3. Vendors' Product Scores for the Full UC for Midsize Organizations

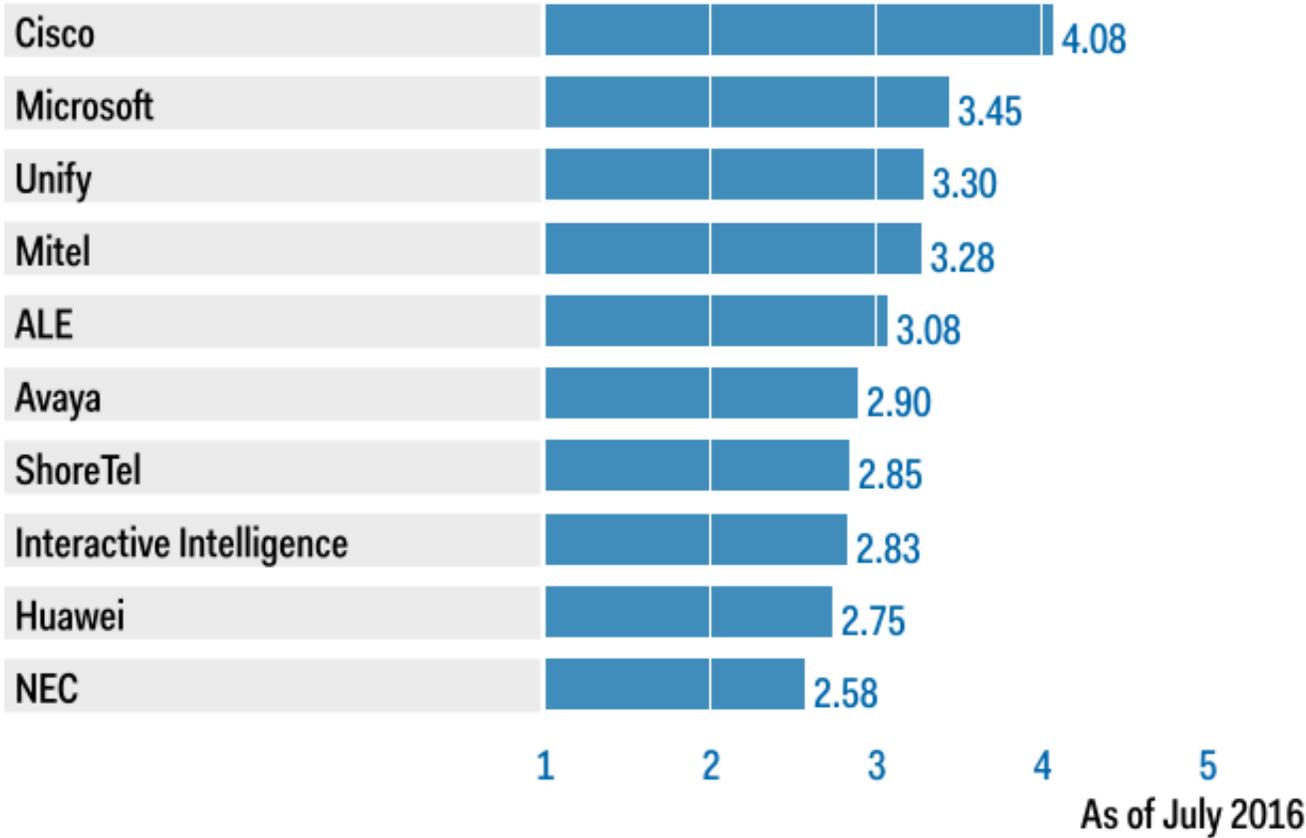
Product or Service Scores for Full UC for Midsize Organization



Source: Gartner (July 2016)

Figure 4. Vendors' Product Scores for the Ability to Offer Hybrid Solutions Use Case

**Product or Service Scores for Ability to Offer Hybrid Solutions**



Source: Gartner (July 2016)

Vendors

**ALE**

Paris-based ALE, marketed under the brand Alcatel-Lucent Enterprise, is 85% privately owned by China Huaxin and 15% owned by Nokia. ALE's Alcatel-Lucent OpenTouch Suite (OTS) is the flagship multidevice, multimedia UC suite available through ALE's partner network, which is strongest in Europe, but has global representation.

The inclusion of the full telephony feature set from the Alcatel-Lucent Omni-PCX Enterprise platform (OXE) into OTS enables ALE to lead with OTS for midsize to large organizations of up to 5,000 users. OTS supports the full range of core UC capabilities with OpenTouch Conversation as the consistent user interface to manage media across desktop, tablet and mobile devices. The OTS platform can be deployed as on-premises, cloud or a hybrid of both, but market penetration of cloud has been limited by modest deployment by partners.

OmniVista 8770 Network Management System is a modular platform for network and application management as well as reporting and analytics. Its modular, integrated approach is especially favored by organizations looking for a single management tool for telephony and UC capabilities.

Alcatel-Lucent Rainbow is ALE's Workstream Collaboration platform, initially deployed as a free service for up to three video and six audio participants with persistent chat, file and screen sharing.

## Avaya

Avaya is a U.S.-based, privately held company with headquarters in Santa Clara, California. It is owned by the private equity firms TPG and Silver Lake Partners. Avaya Aura is the flagship solution for the enterprise market that includes telephony and UC. It comprises Avaya Aura Platform (AAP), Avaya Aura Conferencing, Breeze (formerly Engagement Development Platform), Avaya SBCE, Avaya endpoints and Scopia Video Conferencing.

Avaya has yet to merge its conferencing products, maintaining separate platforms for audio and web conferencing, and video conferencing, which presents cost of ownership and administration challenges. Communicator 3.0 (currently in controlled release) is the client approach to achieving a unified user experience.

Avaya Breeze is an application development platform for exposing collaboration capabilities for custom development and integrations including reusable "Snap-ins." The Avaya Snapp Store is an online marketplace where applications can be sold, trialed and purchased.

Zang is Avaya's wholly owned subsidiary offering a public cloud platform for applications and services that includes Zang Spaces, its workstream collaboration solution that is currently in controlled introduction with selected customers. The hybrid approach for Avaya Aura is focused largely on spanning capabilities between on-premises and private cloud environments.

## Cisco

Cisco is a U.S.-based public company with headquarters in San Jose, California. Cisco's UC solutions are built on the flagship Cisco Unified Communications Manager (Unified CM). This is a single, multimodal architecture that supports all of the core capabilities of a UC platform. It meets a range of user requirements, from basic telephony to multimodal conferencing and high-end telepresence capabilities. Cisco Business Edition 7000 targets large enterprises, while Business Edition 6000 targets midsize organizations.

Cisco's UC suite is mostly a hybrid of on-premises for telephony and video, and web conferencing from cloud-based Cisco WebEx and Collaboration Meeting Room. The Jabber client provides a largely consistent unified user experience across desktop, tablets and mobile devices.

The company's acquisition of Acano boosts the meeting experience enabling integration with Microsoft Skype for Business and WebRTC clients.

Cisco Spark is the workstream collaboration capability that offers messaging, meetings and voice calling across WebRTC, desktop and mobile client interfaces as well as with Cisco IP phones and video endpoints. The acquisition of cPaaS provider Tropo has boosted Cisco's integration

capabilities for Spark with cloud-based APIs for integration to customer service and business applications.

## Huawei

Huawei is a privately owned company headquartered in China. Its flagship UC solution centers on eSpace, an IMS-based architecture, powered by Huawei's intelligent media processing and transmission engine (HME). Although more than 70% of its business is in China and the wider Asia/Pacific region, the company is increasing its presence in the emerging markets of Latin America, the Middle East and Africa. It sells directly and through distributors in most markets worldwide.

Huawei's carrier-grade platform eSpace UC supports a full suite of UC capabilities, and is mostly deployed in a service provider infrastructure. Lack of exposure to global markets limits the platform's ability to account for regional differences in functional needs. The eSpace client supports Windows PC and mobile operating systems. Language support is limited to Huawei's established markets for eSpace.

The platform can be deployed as on-premises, in the cloud or a hybrid of the two; however, a selective market focus limits the availability of the hybrid offer from partners.

There is no focus on the workstream collaboration capability.

## Interactive Intelligence

Interactive Intelligence is a U.S.-headquartered, publicly held company with shares traded on the Nasdaq Stock Exchange. Although Interactive Intelligence's Customer Interaction Center (CIC) is better known for providing contact center solutions, its client references report equal (if not larger) back-office and enterprise UC deployments. The company is also gaining market traction with its Pure Cloud platform for customer engagement, communications and collaboration.

CIC is a single-platform software architecture that supports telephony, unified messaging and audio conferencing capabilities natively, but relies on partnerships — particularly with Microsoft — for web and video conferencing. CIC lacks multipoint control unit capabilities, relying instead on integration with Vidyo. Clients for mobile devices do not support voice or video over IP.

Interoperability and integration are strong features of CIC from its roots in the contact center industry with tight integration to Microsoft Skype for Business and CRM applications such as Salesforce, Oracle and SAP.

CIC can be deployed in an on-premises configuration or as a private cloud solution. Interactive Intelligence has also made available a CIC integration to its PureCloud platform, which gives access to cloud-based UC and collaboration features such as workstream collaboration, instant messaging, video, screen sharing and content management. PureCloud is a microservice-based platform running on Amazon Web Services infrastructure. It offers customer engagement, communications and collaboration functionality.

## Microsoft

Microsoft is a U.S.-based, publicly listed, global company headquartered in Redmond, Washington. Microsoft Skype for Business provides a consistent, single-client experience for presence, IM, voice, video and meetings across desktop and mobile devices. It is available as Skype for Business Server version for on-premises or dedicated hosted environments, and Skype for Business Online as part of Office 365.

Skype for Business Server supports most of the functional requirements needed to support information workers, but relies on partners for some telephony-centric needs. There is currently no Skype for Business qualification program for independent software vendors, which may inhibit partner planning. The client experience across PC and mobile environments is consistent.

Users can coexist seamlessly between the Server and Online versions, but must be assigned as users of only one platform. Since Online lacks feature parity with Server, augmenting with partner products can result in a complex architecture.

Microsoft has several software assets that collectively constitute workstream collaboration (including the acquisition of Talko, persistent chat within Skype and Yammer) but no single product or service capability.

## Mitel

Mitel is a global, publicly traded company, with headquarters in Ottawa, Ontario. Mitel's UC portfolio has a number of call control products, and MiCollab is the flagship product for integrated UC capabilities. Around 90% of Mitel's business is split equally between North America and Western Europe.

MiCollab supports the core UC capabilities with a partnership with Vidyo for HD quality, multiparty video conferencing and integration with other vendor video solutions. The MiCollab UC client delivers a consistent user experience across desktop, web and mobile devices for up to eight devices.

MiCollab can be configured as on-premises, cloud or a hybrid of both, with cloud service availability in North America, the U.K., France, Germany and Australia.

MiTeam is Mitel's workstream collaboration approach that offers access via the existing MiCollab UC client to cloud-based collaborative content and persistent chat forums. There is no free offer for MiTeam.

## NEC

NEC is a global provider of IT and communications services and products with headquarters in Tokyo, Japan. NEC's flagship UC offering, Univerge 3C offers a fully integrated, complete UC suite in a single application platform. It has a good distribution of product revenue globally outside of Japan.

Univerge 3C supports the core conferencing and messaging capabilities but relies on integration with Univerge SV9500 for core telephony capabilities. The desktop and mobile clients offer the same user experience, but there are separate mobile clients for UC and collaboration.

Univerge Blue is the UCaaS platform that enable users to be connected between a public cloud and dedicated instance of Univerge 3C. The deployment of Univerge Blue to U.S.-only data centers limits the availability of the hybrid option.

There is currently no focus on a workstream collaboration capability.

## ShoreTel

ShoreTel is a publicly traded company that is headquartered in California. The main market for its flagship UC solution, ShoreTel Connect, is North America, which makes up 93% of its business; however, it is present in Western Europe and Asia/Pacific markets.

ShoreTel Connect supports most of the core UC features including peer-to-peer video, but relies on partners to deliver multiparty video conferencing. The ShoreTel Connect client provides the same desktop user experience across on-premises, cloud and hybrid deployments, while ShoreTel Mobility provides a feature-rich mobile device experience.

ShoreTel Connect Hybrid is a unified communications as a service (UCaaS) platform that connects cloud based users with on-premises ShoreTel Connect users. Both groups can access cloud-based on-demand services including Fax, Scribe and Contact Center. Data Centers are shared between North America and Western Europe with limitations in global delivery.

There is currently no workstream collaboration capability.

## Unify

Unify is wholly owned subsidiary of Atos, a France-headquartered global system integration and outsourcing business. OpenScape is the flagship UC software for midsize to large enterprises. While Europe makes up more than 70% of Unify's product business, it is present in most markets globally.

OpenScape Enterprise is the UC Suite for medium to very large enterprises, while OpenScape Enterprise Express serves midsize organizations and OpenScape Business small to midsize organizations. OpenScape Voice is the company's telephony platform with OpenScape UC and OpenScape Web Collaboration supporting the other core UC capabilities. There are multiple desktop and mobile clients to deliver the user experience.

OpenScape Fusion is an extensive toolkit for integrating OpenScape with business applications and third-party products.

Circuit is Unify's workstream collaboration approach, offering cloud-based persistent messaging, conferencing and file sharing. There is an active and growing developer community supporting both free and premium users.

## Context

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Most IT organizations have two key strategies for UC:

- To achieve product rationalization by replacing discrete communications services with a more-integrated and easier-to-use suite of applications and services.
- To enable users to work in different ways, challenge traditional processes and procedures, and collaborate more effectively while adopting more-flexible working.

Gartner client inquiry trends show that product and vendor consolidation continues to be a key theme in managing IT expenditure. Increasingly importantly, when extending UC to multiple groups and teams, it represents an increase in expenditure over less-functional, stand-alone, discrete platforms. Cost savings in product rationalization can only be achieved if the proposed vendor (or vendors) meet all user requirements. Understanding the capabilities of vendors and how they compare with their competitors helps organizations decide whether they can pursue a single-vendor strategy. However, limitations in capabilities, given the use-case scenarios, may mean they will need to pursue a multivendor strategy that will lead to higher administration and management costs for supporting multiple — and sometimes competing — vendors.

The drive to support organizational change in working practices, and to enable more-effective collaboration among remote coworkers, will have a higher profile with business leaders than product rationalization. Here, the IT organization's focus shifts away from saving money on infrastructure and toward enabling better business capabilities, for which the benefit justifies additional expenditure on technology. Integration with business processes and applications becomes more important, as speed and ease of user adoption become essential to maximize the benefit of the change in operating practices. Evaluating product capabilities is an essential input to both strategies, and to developing a roadmap for UC.

## Product/Service Class Definition

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Gartner defines unified communications (UC) products — including equipment, software and services — as those that facilitate the use of multiple enterprise communication methods. This can include the control, management and integration of these methods. UC products integrate communication channels (media), networks and systems, as well as IT business applications and, in some cases, consumer applications and devices.

UC products and services offer the ability to significantly improve how individuals, groups and companies interact and perform. These products often make up a stand-alone suite, or they may be a portfolio of integrated applications and platforms spanning multiple vendors. Historically, UC technology has been deployed to extend and add functionality to communication investments. Increasingly, we are seeing it deployed to replace legacy investments — hence, the shift of focus in this research in favor of full UC suite solutions, addressing all enterprise users' communications requirements.

Some products may extend UC outside company boundaries. This can enhance communication among organizations and support interactions among large public communities, as well as for personal communications.

## Critical Capabilities Definition

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UC comprises a wide range of functionalities. This research examines eight critical UC capabilities that are essential to deploying and managing user communications and collaboration experiences.

### Telephony

Telephony incorporates an extended set of voice features used by different groups of employees to manage telephone-centric communications in the workplace.

Historically, this Critical Capabilities assessment has been focused on the limited telephony features required by UC users. This year, we have elevated the profile of telephony in UC solutions to be capable of replacing legacy PBXs and IP-PBXs. It is important that the UC platform provides front-office features (such as operator switchboard and shared-line appearances for personal assistants supporting executives) in addition to the requirements of UC users. Voice messaging and unified messaging are also included as message management capabilities.

A high score here reflects a broad telephony feature set as a component of a UC suite, to satisfy telephony needs of all users. Lower scores reflect missing key features, the need to supplement the UC platform with an IP-PBX for functionality or scale, or simply telephony that is provided as a stand-alone platform.

### Conferencing

Conferencing incorporates an integrated capability to support audio, video and web conferencing in the same UC suite, supporting a wide range of devices and connectivity options. This is a key area of focus for organizations in their UC planning and implementation.

The value of conferencing is its ease of use, including the ability of users to schedule and set up ad hoc conferencing sessions, as well as adding colleagues, content and desktop sharing.

Conferencing should include meeting room technologies, multipoint webcam approaches, and integrated solutions that integrate room-based and remote users. Users should be able to move between the different conferencing modes (for example, audio, video, web and instant messaging) without having to restart conference sessions.

A high score here reflects full support for all conferencing modalities in a single platform, accessible across a wide range of desktop and mobile platforms. Lower scores reflect a best-of-breed approach, with separate products that require integration to work together, or the need to add partner products or some components of videoconferencing not included in the product portfolio.

### Instant Messaging and Presence

This is the ability to provide IM, presence and rich presence aggregation, while publishing presence and location information from multiple sources.

As a core competence of a UC suite, presence is an essential tool for reporting the status of all users and devices through client, mobile and web applications. It is increasingly important that IM and presence federate with other platforms and external organizations, even though support for standards is starting to wane, as cloud providers give up on supporting Extensible Messaging and Presence Protocol (XMPP).

A high score here reflects the ability to federate rich presence services internally and externally. Storing and archiving content are key requirements for some market segments. Lower scores reflect a limited product focus and limited presence services.

### Workstream Collaboration

Workstream collaboration is an immersive, rapid-response, collaborative work model that improves team agility and effectiveness by encouraging greater self-organization, self-management, and localized decision making.

Group members can work independently, yet maintain situational awareness, share information, and self-synchronize as work progresses. Products in this space often have plug-in models that allow codeless integration with a wide variety of "prosumer" and business applications, enabling employees to build custom cross-application workflows. Rising interest in this type of conversational work model is a response to the emergence of more nonroutine work and is an example of "extreme collaboration."

This market is served almost exclusively by cloud-based infrastructure adopting a "freemium" commercial model that encourages base-level service adoption. Through pervasive user experience, this escalates to a richer service model that is monetized through user-based consumption. This market segment is highly volatile with over 60 vendors that we have identified so far. As workstream collaboration continues to evolve, it will become a mainstream collaborative work model used by high-performing teams to self-organize and self-manage nonroutine work.

Given the market immaturity, it is difficult to rate vendors with these capabilities as "excellent" or "outstanding," but those without fully launched products and services will score lower.

### Clients

Clients are a critical deliverable for a high-quality user experience, with support for multiple channels through a single, consistent interface for PC, Mac and mobile operating systems. The UC client is the primary interface from which users manage multimodal communications sessions.

The UC client enables an instant message session to be modified into a voice or video session with content sharing in many cases. The client user interface should be simple to operate, work across public and private networks, and have a consistent look and feel across desktop, mobile and web environments. Users should also be free to use different clients consistent with their work style or need.

A high score here reflects a consistent look and feel, with a single client portfolio for all communications types across multiple operating systems. Lower scores reflect multiple clients, limited choice of clients, or more investment in desk phone user experiences than software clients.

### Interoperability/Integration

This enables business and collaboration applications to directly integrate with and manage communication functionality. This is done by offering APIs, service interfaces and development tools to facilitate customized and productized integration of a range of applications with communications.

For example, the ability to establish a conference call with colleagues to share desktop content for a second opinion can be achieved more efficiently with the integration of the UC communications stack. This enables groups of users to identify the value of communications integrated with business applications. In some cases, applications may offer preintegrated communications functionality. For instance, collaboration and notification applications may be preconfigured to work with well-known communication environments. Interoperability with external organizations (suppliers, partners and customers, for example) is also a requirement.

A high score here reflects a strong approach to partnering and investment in APIs and development platforms that enable integration. Lower scores reflect a sole reliance on standards and minimal productized integrations.

### Administration

Administration covers centralized configuration, reporting and analytics across all communication elements and partner platforms, where required. Administering a network of UC users is becoming increasingly challenging, as the network grows in size and complexity.

Demand for higher bandwidth in voice and video applications is putting network deployments and architectures under stress. Predeployment assessment and postdeployment monitoring are key requirements, provided directly or in partnership with specialized players. Equally important is the need to understand adoption and usage characteristics and to identify where services may be improved or extended to create greater impact for user groups.

A high score reflects the ability to administrate and manage all core UC capabilities through a single administration platform, including partner products where required. Lower scores reflect a lack of automation for configuration and limited support for analytics.

### Hybrid On-Premises/Cloud

This is the ability to integrate some UC components on-premises (or located in a data center) and other UC components in the cloud. User requirements to seamlessly work between the two models are increasingly key, as organizations demand increased flexibility.

Flexibility includes the ability of an organization to change its deployment models and licensing terms to meet the needs of agility and operational flexibility. All UC applications should support

virtualization and the ability to move application loads among different computing resources, while the user experience remains consistent, regardless of application location.

A high score here reflects a fully virtualized infrastructure that supports a consistent client experience among on-premises, private and public cloud deployments. Lower scores reflect incomplete virtualization and limited public cloud infrastructure.

## Use Cases

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Enterprises develop their communication infrastructures at different rates in response to differing requirements, and within the context of varying infrastructure investments. As a result, the UC market is driven by a wide range of user needs and environments. However, enterprises typically focus on one of the following use cases.

### Full UC With Strong Telephony

Midsize or large organizations are looking to enhance their telephony infrastructures, and IT leaders need solutions with strong telephony capabilities and other UC functions.

In this use case, the organization recognizes that users have strong, telephony-centric requirements. Here, the UC suite needs to replicate legacy PBX functionality, as well as meet conferencing and mobility requirements.

### Full UC With Strong Collaboration

Midsize or large organizations are looking to enhance their ability to support collaboration activities and applications.

IT leaders are looking for solutions with strong conferencing, email and instant messaging abilities that can integrate well with key collaboration applications, in some cases, via communications-enabled business process tools and APIs. Continuous UC capabilities are emerging as key to organizations that are focused on strengthening collaboration capabilities. Although traditional telephony requirements are useful, they are not the focus of these types of organizations.

### Full UC for Midsize Organization

Midsize businesses have many of the same objectives as their larger counterparts but operate on a smaller scale and function with fewer IT assets and resources.

Core capabilities that are of greater importance to this size of organization are:

**Ease of administration, management and use:** Midsize enterprises prefer solutions that are straightforward to use and manage. Interfaces that are intuitive and easy to use will be used by more employees across the organization and receive higher satisfaction ratings. Solutions should offer straightforward and consolidated administration and management tools.

**UC integration:** Employees of midsize enterprises tend to be highly mobile, and many have multiple job functions. UC applications should integrate with common business applications through APIs to

extend business-specific functionality to worker groups. Furthermore, business functions should easily be extended to mobile devices to enable flexible work scenarios.

**Hybrid configurations:** Many midmarket organizations will opt to obtain UC functionality via a mix of cloud-based and on-premises delivery approaches. Consequently, the ability for UC solutions vendors to position flexible provisioning models that enable organizations to choose a combination of cloud-based and on-premises delivery will increasingly be a part of midmarket enterprise's evaluation process.

### Ability to Offer Hybrid Solutions

Sourcing a mixture of cloud and on-premises components is useful when managing services through network transitions from decentralized to centralized deployments.

The most common architecture for hybrid solutions is where on-premises UC infrastructure for telephony and group video is complemented by cloud-based audio, video and web conferencing. This enables IT organization to offer users an integrated experience between the UC capabilities without first having to refresh and expand the IT infrastructure to support IP voice and video services. Gartner expects organizations to increasingly look at ways to move UC capabilities between private and public cloud infrastructures to maximize the flexibility and durability of their collaboration environments.

### Vendors Added and Dropped

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IBM was dropped because it doesn't have any focus on providing telephony as a critical capability.

### Inclusion Criteria

We have included UC solutions based on the following criteria:

- They must meet the inclusion criteria of the "Magic Quadrant for Unified Communications."
- The vendor must have a significant market presence in four or more of the critical capabilities outlined above. Market presence can be demonstrated in one of two ways — by significant market share or by differentiating innovation.
- The product must have enterprise deployments with references (as captured for the "Magic Quadrant for Unified Communications").
- The solution set must enable a complete portfolio, even if some components are offered via partnerships.

Table 1. Weighting for Critical Capabilities in Use Cases

Critical Capabilities	Full UC With Strong Telephony	Full UC With Strong Collaboration	Full UC for Midsize Organizations	Ability to Offer Hybrid Solutions
Telephony	40%	5%	15%	5%
Conferencing	15%	20%	10%	5%
Instant Messaging and Presence	5%	20%	5%	5%
Workstream Collaboration	0%	10%	0%	10%
Clients	5%	20%	10%	15%
Interoperability/Integration	15%	5%	20%	10%
Administration	5%	10%	20%	10%
Hybrid On-Premises/Cloud	15%	10%	20%	40%
Total	100%	100%	100%	100%
				<b>As of July 2016</b>

Source: Gartner (July 2016)

This methodology requires analysts to identify the critical capabilities for a class of products/services. Each capability is then weighed in terms of its relative importance for specific product/service use cases.

### Critical Capabilities Rating

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Each of the products/services has been evaluated on the critical capabilities on a scale of 1 to 5; a score of 1 = Poor (most or all defined requirements are not achieved), while 5 = Outstanding (significantly exceeds requirements).

Table 2. Product/Service Rating on Critical Capabilities

Critical Capabilities	ALE	Avaya	Cisco	Huawei	Interactive Intelligence	Microsoft	Mitel	NEC	ShoreTel	Unify
Telephony	4.0	3.5	4.5	3.5	3.0	2.0	4.0	3.5	4.0	3.5
Conferencing	3.5	3.0	4.5	3.5	2.5	4.5	3.5	3.0	2.0	3.5
Instant Messaging and Presence	3.0	3.0	4.0	2.5	3.0	5.0	3.5	3.5	3.0	3.5
Workstream Collaboration	2.0	1.5	3.5	1.0	3.5	2.0	1.5	1.0	1.0	3.0
Clients	4.0	3.5	4.5	3.5	2.0	4.5	4.5	3.5	4.0	3.5
Interoperability/Integration	3.5	4.5	4.0	3.0	4.5	3.0	3.5	3.0	3.5	4.0
Administration	4.0	3.0	4.0	3.5	3.0	3.0	3.5	3.5	3.5	3.5
Hybrid On-Premises/Cloud	2.5	2.5	4.0	2.5	2.5	3.5	3.0	2.0	2.5	3.0
<b>As of July 2016</b>										

Source: Gartner (July 2016)

Table 3 shows the product/service scores for each use case. The scores, which are generated by multiplying the use-case weightings by the product/service ratings, summarize how well the critical capabilities are met for each use case.

Table 3. Product/Service Score in Use Cases

Use Cases	ALE	Avaya	Cisco	Huawei	Interactive Intelligence	Microsoft	Mitel	NEC	ShoreTel	Unify
Full UC With Strong Telephony	3.58	3.38	4.30	3.23	3.03	3.08	3.68	3.13	3.33	3.50
Full UC With Strong Collaboration	3.33	3.00	4.18	2.93	2.78	3.90	3.48	2.98	2.88	3.43
Full UC for Midsize Organizations	3.50	3.33	4.18	3.15	3.05	3.35	3.58	3.05	3.25	3.50
Ability to Offer Hybrid Solutions	3.08	2.90	4.08	2.75	2.83	3.45	3.28	2.58	2.85	3.30
<b>As of July 2016</b>										

Source: Gartner (July 2016)

To determine an overall score for each product/service in the use cases, multiply the ratings in Table 2 by the weightings shown in Table 1.

## Gartner Recommended Reading

*Some documents may not be available as part of your current Gartner subscription.*

"Leverage Bimodal IT Methods to Advance UCC"

"Magic Quadrant for Unified Communications"

"Hype Cycle for Unified Communications and Collaboration"

"The Strategic Implications of Microsoft's Skype for Business Options"

"Choosing Between a Cisco and a Microsoft UC Roadmap"

"Magic Quadrant for Unified Communications for Midsize Enterprises, North America"

## Evidence

Scoring for the eight critical capabilities was derived largely from the following sources:

- Gartner analysts' conducted collective research and regular internal collaboration sessions.
- Each vendor in this research responded in detail to a comprehensive, annual primary research survey questionnaire administered by the authors.
- Feedback was sourced from our end-user clients during telephone or face-to-face inquiry sessions, and using data collected from Gartner Peer Insights.
- Feedback from vendor references was provided as part of the Magic Quadrant and Critical Capabilities research methodologies.

### Critical Capabilities Methodology

This methodology requires analysts to identify the critical capabilities for a class of products or services. Each capability is then weighted in terms of its relative importance for specific product or service use cases. Next, products/services are rated in terms of how well they achieve each of the critical capabilities. A score that summarizes how well they meet the critical capabilities for each use case is then calculated for each product/service.

"Critical capabilities" are attributes that differentiate products/services in a class in terms of their quality and performance. Gartner recommends that users consider the set of critical capabilities as some of the most important criteria for acquisition decisions.

In defining the product/service category for evaluation, the analyst first identifies the leading uses for the products/services in this market. What needs are end-users looking to fulfill, when considering products/services in this market? Use cases should match common client deployment scenarios. These distinct client scenarios define the Use Cases.

The analyst then identifies the critical capabilities. These capabilities are generalized groups of features commonly required by this class of products/services. Each capability is assigned a level of importance in fulfilling that particular need; some sets of features are more important than others, depending on the use case being evaluated.

Each vendor's product or service is evaluated in terms of how well it delivers each capability, on a five-point scale. These ratings are displayed side-by-side for all vendors, allowing easy comparisons between the different sets of features.

Ratings and summary scores range from 1.0 to 5.0:

1 = Poor: most or all defined requirements not achieved

2 = Fair: some requirements not achieved

3 = Good: meets requirements

4 = Excellent: meets or exceeds some requirements

5 = Outstanding: significantly exceeds requirements

To determine an overall score for each product in the use cases, the product ratings are multiplied by the weightings to come up with the product score in use cases.

The critical capabilities Gartner has selected do not represent all capabilities for any product; therefore, may not represent those most important for a specific use situation or business objective. Clients should use a critical capabilities analysis as one of several sources of input about a product before making a product/service decision.

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