

Magic Quadrant for Meeting Solutions

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Meeting solutions blend communications, collaboration and content sharing to enable virtual meeting scenarios to satisfy a variety of use cases. Along with its Critical Capabilities companion, this research helps digital workplace application leaders to determine vendors best suited to their needs.

Strategic Planning Assumptions

Global meeting solutions' end-user spending will yield an 11% (2019 through 2024) compound annual growth rate (CAGR) as organizations increasingly adopt flexible work styles and cloud meeting services that enable this flexibility.

By 2024, remote work and changing workforce demographics will impact enterprise meetings so that only 25% will take place in person, down from 60% today.

Seventy-four percent of companies plan to permanently shift to more remote work as a result of their experiences during the forced isolation caused by COVID-19.

By 2023, 50% of all videoconference room systems will be based on Android- or Windows-based appliances rather than traditional video codecs.

Market Definition/Description

Meeting solution usage exploded in 2020 due to pandemic-related office closures and resulting workplace policies enacted to support business continuity in remote work settings. All vendors in this market segment reported unprecedented demand for their meeting solutions as businesses, educational institutions and public-sector agencies sought effective ways to help employees and students stay connected and remain productive while at home. Organizations needed to act quickly to keep operations running and therefore sought easy-to-use video meeting solutions to emulate in-person experiences. Many vendors in this market responded by making access to their meeting solutions free of charge. This generated goodwill for existing and prospective customers that needed to scale remote meetings.

As a result, adoption of these services expanded rapidly, not only for business meetings, educational purposes and remote patient care, but as part of people's daily lives as they looked to stay connected to family, friends and services of personal interest. Religious services, yoga classes, wine tastings and other social events moved online, with meeting solutions providing the technology platform that made these life-enriching experiences possible. Gartner expects a

positive ripple effect in enterprise adoption of video engagement as workers become more comfortable and confident in remote meetings, thanks to the use of video meeting applications outside of work.

In the typical business context, meeting solutions are collaboration tools that support interactions between participants for daily teamwork, presentations, training and webinars. Gartner sees demand for meeting solutions rising for new use cases such as online city council meetings, virtual courtrooms and remote banking scenarios (to name a few). As the use cases expand, meeting solution vendors will need to expand their feature sets or establish technology partnerships to accommodate the workflows and data sharing for these sessions.

Organizations with complex needs typically use separate meeting solutions for informal collaboration (among users within the same team or project) and another for more formal meeting scenarios (external presentations, learning/training scenarios and large-scale webinars). This often causes an organization to deploy solutions from more than one vendor.

Application leaders responsible for digital workplace applications deploy meeting solutions to:

- Eliminate geographic barriers for intraorganizational, customer and community communications.
- Increase employee engagement for remote workers and team cohesiveness by using video and digital whiteboards.
- Reduce business travel expenses and employee inconvenience.
- Support work from home on a full- or part-time basis.
- Train remote participants in multiple locations.
- Deliver corporate or departmental communication events, such as employee town hall meetings.
- Automate the recording and transcribing of meeting discussions, action items raised and decisions reached.
- Ensure greater business continuity in times when employees are separated from each other and the business for any reason.

Magic Quadrant

Figure 1. Magic Quadrant for Meeting Solutions





Source: Gartner (October 2020)

Vendor Strengths and Cautions

Adobe

Adobe is a Niche Player in this Magic Quadrant. Adobe Connect can be deployed as SaaS, premises-based software, or as a managed service. Adobe’s sales and service operations are geographically diversified. Customers consider Adobe Connect for their remote learning/training and webinar scenarios due to its robust feature set and customization options. The vendor’s three-year vision for Connect is to expand its reach into the small and midsize business (SMB) segment and satisfy emerging online meeting use cases through product innovation, pricing and marketing campaigns.

Strengths

- **Learning solutions:** Adobe has aligned the Adobe Connect application with other Adobe digital learning technologies. It is able to position and sell an end-to-end learning solution that includes learning content creation tools (Adobe Captivate, Adobe Presenter), a learning management solution (Adobe Captivate Prime) and virtual classroom software (Adobe Connect).
- **Geographic reach:** Adobe offers Connect, along with its broad suite of business applications, in a variety of deployment options around the world. This geographic reach provides Adobe customers and prospects with assurances that support for Connect is available where needed.
- **Experience customization:** Adobe Connect provides a rich set of interactive features for complex use cases and allows meeting hosts to highly customize the user experience. This combination creates opportunities for optimal screen layout design and richer engagement with meeting attendees.

Cautions

- **Slower pace of innovation:** Adobe has yet to invest in certain innovations available in competitor meeting solutions, such as virtual meeting assistants, its own integrated digital whiteboard hardware, wireless screen sharing and digital signage.
- **User experience complexity:** Given its focus on particular vertical markets and associated meeting scenarios, Adobe Connect can be complex for end users to manage and expensive to procure for more modest, informal meeting scenarios.
- **Fewer integration options:** While Adobe Connect integrates with several other Adobe applications, it offers limited integration options when compared with some of its meeting solution competitors. This is true in terms of integration with popular cloud-office suites and other relevant business applications.

Avaya

Avaya is a Niche Player in this Magic Quadrant. Avaya offers Spaces, a workstream collaboration platform with integrated live meeting capabilities. It is sold primarily as an add-on for users of the vendor's unified communications as a service (UCaaS) or room system offerings. Spaces can be deployed as SaaS, premises-based software, cloud-premises hybrid or as managed services. Avaya's sales and service operations are geographically diversified. Its three-year vision for Spaces is to grow its influence in the team collaboration space, enable dynamic integrations through its communications platform as a service (CPaaS) capabilities, and add key partnerships around the world.

Strengths

- **Modern user experience:** Avaya Spaces — a persistent team collaboration workspace — has a modern user interface (UI) that combines a live meeting experience with workstream

collaboration-based workflows. This allows teams to be productive across of spectrum of internal collaboration use cases with both synchronous and asynchronous communication options.

- **Geographic reach:** Avaya's product deployment and sales organizations both have global reach, with significant customers in all regions that Gartner tracks. This makes the vendor an option for multinational enterprises where more limited offerings cannot compete.
- **Strong partnerships:** That geographic reach is augmented by a robust set of service provider partnerships extended from the vendor's other lines of business, which Avaya Spaces can leverage. This provides a strong base of sales opportunities, as well as solid deployment, service and support options.

Cautions

- **Dependence on existing lines of business:** Avaya's main success in the meeting solution market has been attaching Spaces to its existing UC and room system business. Spaces is not often considered by buyers when evaluating stand-alone meeting solutions in the market.
- **Trailing on smart meeting initiatives:** Avaya's meeting solution trails on smart meeting innovations when compared with other vendor offerings in this Magic Quadrant. Spaces does not currently offer its own virtual meeting assistant or support for live or recorded meeting transcription. Additionally, it has limited options for virtual whiteboarding, and no ability to tag important moments or create a meeting video highlight reel.
- **Fewer vertical market solutions:** Avaya offers integrations with popular workstream collaboration and cloud office applications. However, it lacks the vertical-specific integrations needed to deliver turnkey solutions.

BlueJeans by Verizon

On 15 May 2020, Verizon completed the acquisition of BlueJeans' entire business and organization.

BlueJeans by Verizon is a Visionary in this Magic Quadrant. The BlueJeans Meetings and Events solutions are offered either as stand-alone or bundled with other Verizon UCaaS services (for example, One Talk). Together with BlueJeans Rooms, these solutions are procured by customers wanting to satisfy a variety of meeting scenarios. Video interoperability with Microsoft Teams is also available via BlueJeans Gateway. BlueJeans Meetings is deployed as a SaaS-based solution. The vendor's sales and service operations are geographically diversified. Its three-year vision for its meeting solutions is to grow the business across a variety of vertical markets and increase adoption with mobile users by leveraging Verizon's mobile edge network and 5G investments.

Strengths

- **Rich feature set:** BlueJeans' meeting solution offering has a rich set of features that allows it to be deployed for everyday meeting scenarios and corporate events. Its innovative Smart

Meetings feature package offers an opportunity for organizations to improve meeting effectiveness through continuous collaboration and integrated workflows.

- **Integration options:** BlueJeans offers a wide range of integrations that gives customers choice in how to access its video collaboration technology. Through its partnerships, customers can opt to access BlueJeans through Microsoft Teams, Slack, Workplace from Facebook, or Trello.
- **Verizon network bundling:** The acquisition by Verizon should create opportunities for BlueJeans customers to leverage Verizon's mobile/data network and UCaaS expertise. If the newly combined organizations execute well, BlueJeans by Verizon promises the advantage of cost-effective bundling, deeper service and support teams, and better quality of service.

Cautions

- **Lacks visibility in the market:** BlueJeans is not commonly in the consideration set of meeting solution providers. Routes to market must be expanded, including a better web-based purchasing process, to reach buyers across all segments.
- **Potential acquisition complications:** While Verizon's acquisition of BlueJeans looks like a good fit, gaining organizational and portfolio alignment can be a complicated and time-consuming process. Transactions like this tend to create distractions, which can lead to uncertainties in roadmap or service delivery execution.
- **Advanced virtualized features:** BlueJeans offers fewer options for virtual whiteboarding and virtual voice-based assistants to drive meeting controls than some other competitors in this Magic Quadrant.

Cisco

Cisco is a Leader in this Magic Quadrant. Cisco offers Webex Meetings, Events and Training to address a variety of use cases; Webex Teams for workstream collaboration; and Cisco Meeting Server for videoconferencing infrastructure. Customers can choose from a variety of deployment options: SaaS, premises-based software, cloud-premises hybrid or managed service. Cisco also offers a range of video endpoints for rooms and personal workspaces. Its operations and channel ecosystem for sales, delivery and support are global. Cisco's three-year roadmap includes improved user meeting experiences through AI-driven features, as well as demand-driven improvements in its infrastructure, security and scaling.

Strengths

- **Product range and integration:** Cisco has a comprehensive array of video infrastructure, endpoint and meeting application offerings available through a number of fully integrated deployment and API options to natively integrate within customer workflows. These options include hybrid architectures that help maximize conferencing quality and security.
- **Geographic presence:** Cisco has the most extensive channel ecosystem for sales, delivery and support of meeting solution software and hardware across global regions out of all vendors in

this Magic Quadrant. As a result, very large multinational corporations tend to consider Cisco Webex for their meeting requirements.

- **Innovation and security:** Cisco continues to bring both a market-leading set of security capabilities and innovation to Webex Meetings. Examples include meeting transcriptions to enable action item follow-up (through the 2019 acquisition of Voicea), AI-enabled conference room experiences, and voice-enabled “join meeting” processes.

Cautions

- **Market reaction lacks enthusiasm:** Cisco Webex Meetings is a mature solution, but enterprise buyers increasingly turn to alternative solutions that either are preferred by their end users or are more cost-effective.
- **Offering process:** Cisco’s licensing is complex, and there’s little flexibility in its offering process. This leads to challenges for partners to cost-effectively shape offers to match the buyer’s desired dimensions for Webex Meetings and Teams.
- **Leadership changes:** Cisco’s Collaboration business unit has experienced several changes in executive management over the last two years. Though still seen as a trusted enterprise vendor, buyers are questioning whether Cisco is retaining its focus on operational excellence and clear product strategy through all the changes.

Google

Google is a Challenger in this Magic Quadrant. The Google G Suite cloud office bundle includes Google Meet for meetings with up to 250 participants and has associated devices for in-room collaboration experiences. Google’s deployment model is SaaS only. Its sales and service operations are geographically diversified. Google’s vision for the next three years focuses on supporting secure, stable, enterprise-grade meetings for businesses, schools and nonprofit organizations that need remote, flexible work enabled by cloud solutions.

Strengths

- **Cost-effectiveness:** Google Meet’s presence as part of the G Suite bundle makes it one of the most cost-effective, easy-to-access, enterprise-class options for common meeting scenarios in this research.
- **Instrumentation:** The combination of the Meet quality tool and activity logging gives technical administrators visibility to support real-time troubleshooting of meeting issues and a higher-level view of organizational behavior in adopting tools for remote work.
- **Built into Gmail UI:** Google’s vision to initiate meetings and other types of collaboration from the Gmail interface appeals to organizations where email is the center of collaborative workflow.

Cautions

- **Large external webcasts:** Google Meet, when used for large external webcasts, is limited to broadcast to internal audiences of 100,000 viewers within a domain, and the service does not admit external parties. Google Meet also lacks integrations with marketing automation and CRM solutions, which are useful for marketing-oriented webinars.
- **Breakouts:** Google Meet does not currently support breakout rooms at the time of this research. As this is a complex feature to implement, buyers will need to evaluate its capabilities for scenarios such as online learning and remote workshops when it's made available.
- **Visual collaboration:** Google customers must select and use an additional product – Jamboard – for diagramming, annotation and shared visual collaboration in meetings. Jamboard lacks feature parity across its device, web and mobile experiences.

Huawei

Huawei is a Challenger in this Magic Quadrant. Huawei offers its hardware-based video endpoints and infrastructure for on-premises deployment, and its cloud-based WeLink meeting solution platform as SaaS. Its sales and service operations are concentrated in the China market, with some presence in other regions, with the large exception of North America. Huawei's three-year plan is for expansion of its cloud-based meeting solution in all markets except North America, as well as more advanced meeting experiences based on AI and virtual reality (VR) technology, 5G networks and integrated Internet of Things (IoT) products.

Strengths

- **Intelligent group video systems:** Huawei's robust video endpoints for digital workplace conference rooms both large and small, in combination with its meeting software, deliver intelligent conference room capabilities. These features include on-screen name tagging, automatic speaker framing, acoustic fencing, and extensive interfaces for conference room appliances.
- **Market responsiveness:** Huawei has met changing market requirements with its introduction of workstream collaboration application WeLink. It satisfies evolving meeting recording expectations with flexible recording, archiving and retention options. It also has extensive meeting recording export capabilities to third-party services.
- **Vertical markets:** Huawei has several solutions that satisfy requirements across vertical market segments. One example is video engagement for emergency service operators, where its control and command platform supports up to 300,000 surveillance video cameras.

Cautions

- **Limited geographic diversification:** Huawei is a high-tech economic force in the China and Asia/Pacific regions, with growing influence in the South America and Eastern European regions for its meeting solution offerings. However, the company has very limited business

presence in North America, restricting its ability to sell and support its meeting solution portfolio in those areas.

- **Slower innovation:** Huawei's meeting solution lacks some of the innovative features that its competitors possess, such as the ability to tag important moments during a live meeting or the ability to create meeting highlight reels showing key moments. Also, its room systems do not enable the use of proximity detection via beacons or sensors for easy "join meeting" experiences.
- **Need to ramp up cloud meeting adoption:** While Huawei has a capable premises-based meeting solution, it needs to increase its presence in the cloud-based video meeting services space to keep pace with evolving end-user expectations.

Kaltura

Kaltura debuts as a Niche Player in this Magic Quadrant. Its Kaltura Meetings, Virtual Classroom, webinar and town hall products match enterprise needs for a range of meeting scenarios. Kaltura's solutions support cloud, on-premises and hybrid deployments. Its sales and service operations are geographically diversified. Kaltura's vision for its portfolio over the next three years is to support meetings of all sizes and types across any enterprise role, improve meeting activities with AI, analytics and automation, and maximize opportunities for developers who need APIs for custom experiences.

Strengths

- **Enterprise video:** Kaltura is one of only two vendors in this research that has a defined enterprise video content offering in addition to its meeting solution, so buyers looking for both may find synergy in Kaltura's solutions and its approach to the meeting content life cycle.
- **Vertical industries:** Kaltura's heritage as a vendor supporting learning and training in education and government has informed its meeting product design, with a focus on interactivity, host features such as breakout rooms, whiteboarding and support for attendee engagement, as well as accessibility within the browser.
- **Deployment flexibility:** Kaltura supports cloud, on-premises and hybrid models suitable for most enterprises. It also supports standard meetings of 100 participants, training sessions for 300 and can scale to unlimited for town halls, enabling it to satisfy use cases demanding larger scale. For customers that deploy on-premises, there is no dependency on any cloud services, in contrast with most of its competitors.

Cautions

- **Mind share:** Kaltura has been a market leader in video content management for several years. However, it has fewer meeting solution customers using its offerings than most of its competitors in the meeting solution market.

- **Trails on in-room innovations:** While Kaltura offers native video playback within meeting rooms rather than through desktop sharing, it trails several of its competitors in the meeting solution market as it offers no support for virtual meeting assistants, host proximity detection, intelligent video framing, and background noise cancellation.
- **Meeting controls:** Kaltura lacks certain security features found in competitor offerings, such as customer-controlled encryption keys, and hygiene scanning of weblinks in the chat window.

Lifesize

Lifesize is a Visionary in this Magic Quadrant. Its cloud-based Video Conferencing meeting solution supports a range of requirements for digital workplace collaboration. Lifesize primarily offers its meeting solution in the cloud, which can be added to its existing premises-based video infrastructure for hybrid deployments. It also offers the Icon series of video endpoints for conference rooms. Lifesize's sales and service operations are geographically diversified. Its three-year roadmap includes enhancements to both the paid and free cloud Video Conferencing plans, including better integration with Microsoft Office 365/Teams and Slack to enhance meeting schedule/join processes, end-to-end encryption across all meetings and new customizable video layouts.

Strengths

- **Integrated video endpoints:** Lifesize has expanded its portfolio of hardware-based 4K video endpoints (the Icon series), allowing for native integration with its cloud-based service platform. This optimizes the "join meeting" experience and eases management of the conference room solutions.
- **Flexible licensing options:** In response to changing market priorities, Lifesize has introduced (in addition to a freemium offer) its Rooms-as-a-Service program, which helps customers more easily plan, budget for and scale their video systems. A simple subscription model provides meeting room hardware, a cloud service, maintenance and support for a predictable, fixed price.
- **Global availability:** Lifesize has a global distribution network, while its channel partner ecosystem enables in-market support and region-specific services.

Cautions

- **Advanced features missing:** Although its meeting application has a range of expected features, some more advanced capabilities are not yet part of the native Lifesize offering. These include live captioning/transcription through automated speech to text, and meeting recording transcription.
- **Accessibility compliance lagging:** Lifesize does not include compliance with accessibility standards such as the Americans with Disabilities Act of 1990 (ADA), Web Content Accessibility Guidelines (WCAG) 2.0 (Section 508), and Accessible Rich Internet Applications.

- **Limited deployment options:** Unlike several other vendors in this report, Lifesize does not offer on-premises, managed service or dedicated (single tenant) deployments to new customers of its meeting solution.

LogMeIn

LogMeIn is a Challenger in this Magic Quadrant. It offers GoToMeeting, GoToTraining, GoToWebinar and join.me to match enterprise needs for a range of meeting scenarios. It also has hardware options for conference room needs with its hardware partners through its GoToRoom offering. LogMeIn's deployment model is cloud only. Its sales and service operations are geographically diversified, although these are more limited in Japan relative to many competitors. Its portfolio vision over the next three years is to aid organizations in consolidating their communications portfolios, provide superior software and hardware experience for office and remote workers, and support the demand for webcasts at massive scale by unifying the GoTo suite of products under a single technology platform.

Strengths

- **Product strategy:** LogMeIn offers a GoToMeeting user experience that consolidates meeting activities such as scheduling, chat, personal rooms and meeting artifacts in a single GoToMeeting Hub UI that streamlines workflows before, during and after meetings.
- **Scale:** In terms of meeting volume, broadcast audience size and support resources, LogMeIn's meeting solution set can match or exceed the capabilities of the majority of its competitors.
- **Regulated industries:** LogMeIn is able to meet the certification demands of customers in regulated industries that require compliance with standards such as SOC 2 and 3, HIPAA, PCI and GDPR, as well as those that require AES 256-bit encryption for data in transit and at rest. The vendor's architecture for PSTN calls relies on multiple private circuits rather than public internet.

Cautions

- **Visual collaboration:** GoToMeeting's visual collaboration is limited to drawing and annotation of meeting content, and to integrations with third-party camera capture systems. Some of its competitors also have richer integrated digital whiteboarding features or stand-alone products.
- **Meeting controls:** While providing risk-based authentication, LogMeIn's meeting solutions lack certain meeting controls available in some competitors' products, such as two-factor authentication, hygiene scanning for links in chat, and customer control of encryption keys.
- **Geographic reach:** LogMeIn offers meeting solutions in over 190 countries either directly or through distributors, but a high percentage of its customer presence is in North America and Europe. Buyers in other regions should first confirm local support before committing to purchase the GoTo suite.

Microsoft

Microsoft is a Leader in this Magic Quadrant. Its Microsoft Office 365 cloud office bundle includes Microsoft Teams for meetings with up to 1,000 participants, and Microsoft Teams Live Events for broadcasts for up to 10,000 attendees. Microsoft offers Skype for Business Server for on-premises deployments and, in combination with its cloud services, supports a hybrid model. Its sales and service operations are geographically diversified. Microsoft's three-year vision for Microsoft Teams is to support social connections, business processes, industry-specific workflows and colocated work across distributed teams that are both remote and in the office.

Strengths

- **Office 365 ecosystem:** Microsoft Teams offers a unified client experience for meetings and workstream collaboration, enabling organizations to access a robust set of collaborative capabilities within the broader suite of Office 365 applications, content and room/desktop devices.
- **Pace of innovation:** Microsoft has advanced Teams' meeting features and capabilities well past the previous iterations of its meeting solutions based on Skype for Business. This is expediting adoption of Teams not only from its Skype for Business customer base, but also across the broader market.
- **Deployment flexibility:** Microsoft has increased its limits for meetings and broadcasts in Microsoft Teams. This enables Teams to satisfy more use cases demanding larger scale. For customers reliant on Skype for Business Server, there is no dependency on any cloud services, in contrast with most competitors.

Cautions

- **Managing external participants:** Guest access is often cited as a concern when using Teams with external participants due to uncertainty of governing access to meeting data. Microsoft Teams has two models for inviting outside meeting participants – guest access and external access. External access limits outside participants so they can only see content shared during the meeting. Microsoft customers would benefit from stronger education efforts so meeting hosts can make the right choice.
- **Meeting controls:** Microsoft Teams lacks certain features available in some competitors' products, such as the ability to use strong passwords to protect a meeting or lock a meeting. Locking chat to only host interactions is a multistep process that organizers must configure in Teams' channel settings to limit chatter during formal meetings, online classrooms or similar scenarios.
- **Visual collaboration:** Microsoft customers must select and use additional products within Office 365, such as the Microsoft Whiteboard application, OneNote or other collaboration tools for diagramming, annotation and shared visual collaboration in meetings.

Pexip

Pexip is a Visionary in this Magic Quadrant. Pexip's Infinity meeting solution and infrastructure software address a range of enterprise use cases for collaboration and multivendor conferencing interoperability. The meeting solution can be deployed as cloud-based SaaS, premises-based software or hybrid. Pexip's virtualized video infrastructure software can be deployed on-premises or in the cloud. Its sales and operations are global. Pexip intends to expand its vertical industry programs over the next three years, and deepen its region-based sales/marketing programs to address localized customer needs more precisely.

Strengths

- **Expansive API:** Pexip maintains an extensive suite of management and client APIs that allow customers to integrate and customize their Pexip deployments with a wide range of systems and applications. Examples range from streaming solutions to workflow customization and integrations with digital health record systems and learning management systems.
- **Interoperability leadership:** Pexip has long been known for its ability to integrate group video systems with video meeting platforms. It continues to strengthen this feature capability, with Pexip certified by Microsoft and Google to deliver its video interoperability engine for their meeting platforms.
- **Vertical industry expertise:** Pexip has strong industry programs to meet the particular needs of certain verticals. This is especially true for the healthcare market, for which it offers a customizable, scalable telehealth platform that enables HIPAA compliance and is WCAG 2.0 (Level AAA) and 508 compliant.

Cautions

- **Advanced feature limitations:** Pexip is missing certain key features in its software that the majority of its competitors in this report offer. These include live transcription/captioning through speech to text, fewer meeting recording options and workstream collaboration capabilities.
- **Missing capabilities for virtual classrooms:** Pexip lacks several features needed to support the remote learning/training use case, such as breakout rooms, polling/surveying and Q&A management.
- **No virtual whiteboard:** At a time when many organizations expect basic collaboration features such as virtual whiteboarding, this capability is missing from Pexip's meeting solution.

Quanshi

Quanshi debuts as a Niche Player in this Magic Quadrant. Quanshi is the meeting solution service brand name of G-Net Solutions. It primarily offers its MeetNow cloud and associated Quanshi Box for conference rooms to customers in China and selected countries in the broader Asia/Pacific region. MeetNow can be deployed as SaaS, premises-based software or cloud-premises hybrid. Quanshi's three-year vision for MeetNow is to expand its reach into the burgeoning online video

meeting market in the countries it serves by addressing relevant use cases and opening its API library for more business application integrations.

Strengths

- **Feature richness:** MeetNow is a highly scalable, feature-rich video meeting solution. In concert with its technology partners, Quanshi is able to address a variety of use cases seen in the enterprise and education market segments.
- **Mobile message app integration:** Using popular mobile messaging services in China such as WeChat and Ding Ding as a launch point has allowed Quanshi to realize a rapid adoption of its video meeting services in 2020.
- **Multiple licensing options:** Quanshi offers a comprehensive set of licensing options, including freemium, making it convenient for organizations to procure the MeetNow solution according to their expected business usage and budget.

Cautions

- **Limited geographic reach:** Quanshi is sold and serviced mainly in China and surrounding countries in the Asia/Pacific regions. Organizations in other regions should check for local support before committing to buy the MeetNow service.
- **Not enough large international customers:** Quanshi has proven operational scale and is serving a growing base of customers. However, it does not yet serve very large enterprise or public-sector customers, like the Leaders in this Magic Quadrant do. Therefore, buyers in larger organizations wanting to purchase Quanshi's meeting solution should consider procuring through Quanshi's well-established indirect channel service partners.
- **Trails on innovations:** Compared with the Leaders in this Magic Quadrant, Quanshi offers fewer options for virtual whiteboarding, content delivery networking and meeting host proximity detection in conference rooms.

StarLeaf

StarLeaf is a Visionary in this Magic Quadrant. Its cloud-based Meetings Platform complements its portfolio of room systems designed for a variety of spaces. StarLeaf's meeting solution is offered as SaaS, premises-based software, cloud-premises hybrid and as a managed service deployment. The platform offers a custom integration with Microsoft Teams and can interoperate with H.323 and SIP endpoints. In addition, the vendor's room systems support one-touch join for a variety of third-party meeting solutions. StarLeaf's three-year vision is centered around extending leadership in meetings security and expanding its portfolio of integrations.

Strengths

- **Integrated offering with room systems:** For customers seeking a fully integrated meeting solution that includes conference room systems, StarLeaf provides a compelling offering. The vendor supports a variety of conference room sizes, with one-touch integration not just with

StarLeaf meetings, but also with other leading meeting solution vendors. This is extremely useful for users who frequently join meetings hosted by others.

- **Security and availability:** StarLeaf maintains its own global network with points of presence around the world using public cloud-level physical security. This allows StarLeaf to offer enhanced privacy/security capabilities combined with a 99.999% uptime guarantee.
- **Strong future roadmap:** StarLeaf's continued focus on meeting security is a timely differentiator in a market that has become more conscious of this issue than in previous years. The vendor's focus on interoperability is quite useful for a meeting service that is frequently used to collaborate between organizations.

Cautions

- **Differentiating features:** StarLeaf's meeting solution offering provides fundamental meeting functionality with a pleasant user experience. However, it lacks features seen in leading solutions such as live meeting transcripts, hardware options for digital whiteboards, meeting highlight reels, and ability to tag important meeting moments.
- **Limited geographic adoption:** While StarLeaf does have partner resellers around the world, nearly all of its customers are headquartered in Europe and North America. It also does not yet serve very large customers. As such, its ability to successfully deploy globally at very large enterprise scale is unproven.
- **Vertical market solutions:** StarLeaf has similar integration capabilities as other vendors in this space, but it has fewer vertical market solutions than its leading competitors that address the emerging use cases for videoconferencing.

TrueConf

TrueConf is a Niche Player in this Magic Quadrant. TrueConf offers its Server product in concert with its videoconferencing room systems. It supports SaaS, premises-based and hybrid deployment models. Its sales and services reach into Europe, Asia and North America. TrueConf's three-year vision involves further developing its hardware appliances and adding useful third-party integrations for its meeting solution customers.

Strengths

- **Diversity of deployment options:** TrueConf offers a wide range of deployment models and licensing options to suit its customers' configurations. For its premises-based deployments, no customer data is shared with TrueConf's cloud services, which allows it to satisfy more stringent requirements due to regulatory or security reasons.
- **High-quality 4K video:** Ultra HD support is available for both point-to-point and multipoint videoconferencing sessions on personal devices and in conference rooms, while the vendor's mobile apps can offer full HD video with content sharing.

- **Vertical market solutions:** TrueConf delivers vertical market solutions that solve requirements in healthcare, public sector and the education segments. TrueConf also works with telecom service provider partners to create UC solutions.

Cautions

- **Limited customer base and geographic reach:** While TrueConf has some customers in Europe, Asia and North America, the bulk of its business is in Russia. It remains to be seen whether its operations can support multinational, large-scale deployments.
- **Trailing on innovation:** While TrueConf's meeting solution possesses a fundamental feature set, it lacks innovative, unique meeting features. For example, it has no support for physical digital whiteboards, or for any AI-influenced features such as intelligent video framing.
- **Large-scale meetings require premises-based deployment:** TrueConf Server supports 1,000 participants, but its TrueConf Online service only supports a maximum of 120 participants per meeting.

Zoom

Zoom is a Leader in this Magic Quadrant. It offers Zoom Meeting and Zoom Video Webinar solutions, along with Zoom Room configurations with its partners' hardware devices. Zoom's meeting solutions satisfy a wide variety of well-established and newly defined virtual meeting scenarios. These solutions can be deployed as SaaS, premises-based software, cloud-premises hybrid, managed services or dedicated cloud. Zoom's sales and service operations are geographically diversified. Its three-year vision for its meeting solution set includes recent notable investments to support its strategies for robust vertical market solutions, hardware as a service, hardened security capabilities, and embedding video experiences into common enterprise workflows.

Strengths

- **Wide adoption:** Zoom's popularity is a testament to its focus on user-centric design, service reliability and flexible consumption models. Its well-established freemium use option attracted consumers and enterprises alike in enormous numbers during COVID-19's forced isolation.
- **Addresses expanding use cases:** Zoom's robust feature set and expanding portfolio create opportunities for its meeting solutions to be used effectively across a variety of use cases in the public sector, the education sector at all levels, healthcare and financial services.
- **Offering process:** Zoom maintains flexibility in its offering process with new customers, helping it craft proposals that meet the end-user, IT and procurement requirements of the organization to which it is selling.

Cautions

- **Security concerns linger.** While Zoom's highly publicized security vulnerabilities have been addressed, some businesses maintain rules barring their employees to join Zoom meetings held by other organizations.
- **Need for more indirect channels:** The combination of Zoom's rapid growth and its direct customer engagement model is testing the vendor's ability to deliver high-quality IT experiences by remaining attentive to customer needs.
- **Free today, but for how long?:** The cost to purchase Zoom's meeting solutions is typically lower than that of most competitors, but buyers need to be aware that the items bundled in at no additional cost initially may carry a price tag upon service renewal.

Vendors Added and Dropped

We review and adjust our inclusion criteria for Magic Quadrants as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant may change over time. A vendor's appearance in a Magic Quadrant 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

Kaltura has been added as this vendor has evolved its portfolio to include addressing interactive meeting scenarios.

Quanshi has been added as it has steadily grown its business and now meets the inclusion criteria.

Dropped

The following vendors did not meet the inclusion criteria for this year's report:

- PGi
- Enghouse Systems (Vidyo)
- ZTE

Inclusion and Exclusion Criteria

We use the same criteria for both the Magic Quadrant and Critical Capabilities reports. To be included in both, each vendor must provide at least the following functionality in its meeting solution:

- **Presentation delivery:** All participants can see an online presentation, which is under the control of one participant, who is designated the presenter.

- **Desktop or application sharing:** All participants can see, but not necessarily directly interact with or modify, the presenter's desktop or a specific application on the presenter's system.
- **Text chat:** Participants can exchange real-time textual messages with other participants or the presenter using an instant messaging (IM)-like interface.
- **Basic security:** The solution must have encrypted data transfer, password-protected meetings and host controls that reveal meeting attendees, as well as mute, block and drop those attendees.
- **Integrated voice over IP (VoIP) audio:** To remove or reduce the need for telephone-based audio, the solution must offer the option to use a speaker and microphone (or a headset) to enable participants to listen and speak from their PCs, Macs and mobile devices.
- **Video:** The solution must show live multiparty video feeds of presenters and participants from desktop clients, room systems or mobile devices.
- **Mobility:** The solution must offer specific support for audio, video and content sharing from mobile devices and tablets.
- **Reporting:** The solution must offer detailed reporting for user and room participation, call, device and feature usage (content share, video, recording, whiteboard, etc.) and service performance metrics (QoS).
- **Meetings:** The solution must support at least 100 individual participants. Participants are defined as individuals joining from their own client or a group video system, e.g., multiple people joining from a single conference room on one group system counts as one participant. Solutions that support only one-to-one interaction or small groups are not covered by this research.
- **Webinars:** The solution must support live streaming of large meetings or webinars with more than 1,000 concurrent participants. Additionally, the solution must support integration with content delivery networks for live streaming of large-scale webinars.

Additional inclusion and exclusion criteria are as follows:

- The vendor must have at least \$25 million in annual revenue in its last fiscal year from sales of meeting solution products or cloud services and can validate that revenue via public filings, CEO/CFO attestation or audited statement.
- The vendor must develop and market its primary meeting solution, not mainly resell a meeting solution produced by another company. Additionally, the vendor must illustrate at least 70% of its total meeting solution revenue in 2019 was attributed to selling its **own meeting solution** — defined as offering the required functionality as shown above.

- This Magic Quadrant does not include vendors that generate more than 70% of their meeting solution revenue from hardware sales.
- The vendor must sell and service its own meeting solution in at least five of the following global regions with referenceable customers: North America, Latin America, United Kingdom, Western Europe, Eastern Europe (including Russia), China, Japan, India, other countries in the Asia/Pacific region.
- The vendor must be able to identify at least five reference customers that validate enterprise-scale deployments (whether on-premises or cloud-based). This research focuses primarily on the large and very large enterprise market (vendors primarily focused on SMBs are not included). At least one reference customer must have more than 1,000 seats of internal users.
- Sales and marketing efforts connected with the solution must not be limited primarily to a particular vertical or horizontal process (such as training).

Evaluation Criteria

Ability to Execute

Here we explain how each vendor's company and product(s) have been evaluated. The evaluation weight tells you which criteria are most important for this market.

Several factors contributed to the vendors' positions on the Ability to Execute axis:

- We evaluated the capabilities of the vendors' products for basic and advanced functionality. This factor carried a higher weighting in the evaluation, as IT buyers are increasingly looking for meeting solutions that can satisfy a variety of meeting scenarios and collaboration experiences.
- As this market includes several small and midsize vendors with uncertain futures, financial viability was an important factor.
- We judged the customer experience by assessing rollout and adoption programs, reviewing the extent to which the vendors support their largest enterprise customers, and assessing the meeting host control features that support secure sessions.
- Operations is weighted highly as we evaluated both the scale and security characteristics of the vendors' cloud-based operations.

Table 1: Ability to Execute Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Product or Service	High

Evaluation Criteria ↓	Weighting ↓
Overall Viability	High
Sales Execution/Pricing	Medium
Market Responsiveness/Record	Medium
Marketing Execution	Medium
Customer Experience	High
Operations	High

Source: Gartner (October 2020)

Completeness of Vision

We evaluated the vendors' Completeness of Vision by examining customers' requirements for usage and purchasing, and by assessing how the products aligned with these requirements:

- Vendors that are accurately assessing the meeting solution market and prioritizing their investments to address the growing needs of this market segment received the highest scores in market understanding.
- We scored the sales and product strategies that offer flexibility in supporting multiple deployment models and licensing options higher than a strategy of concentrating on more limited deployment models and meeting scenarios.
- We evaluated vendors' product innovation and ability to address the buyer trends and emerging use cases we are seeing in the meeting solution market.

Table 2: Completeness of Vision Evaluation Criteria

Evaluation Criteria ↓	Weighting ↓
Market Understanding	High
Marketing Strategy	Medium
Sales Strategy	High

Evaluation Criteria ↓	Weighting ↓
Offering (Product) Strategy	High
Business Model	Medium
Vertical/Industry Strategy	Medium
Innovation	High
Geographic Strategy	Medium

Source: Gartner (October 2020)

Quadrant Descriptions

Leaders

Leaders have achieved significant influence and market share relative to their competitors in the meeting solution market, while demonstrating an ability to respond to customers' needs. Leaders have robust, scalable meeting solutions with a wide range of features to satisfy all meeting scenarios, a large installed base, acceptable financial performance and good distribution. Leaders are doing well today and are prepared for the future.

Challengers

Challengers are characterized by operational excellence and good standing in the meeting solution market. Compared with Leaders and Visionaries, their solutions may lack the same pace of innovation and the collaboration or host control features to support all meeting use cases. Additionally, they may lack the necessary licensing model flexibility and offerings to satisfy vertical market requirements.

Visionaries

Visionaries typically have important, unique and/or well-developed collaboration capabilities in their meeting solutions. They provide key innovations that point to the future of this market, and have the features needed to satisfy a variety of meeting solution use cases. However, they have not yet developed a large installed base or sufficiently substantial finances to be considered a Leader and influence the whole market.

Niche Players

Niche Players have good technology in their meeting solutions and should be considered by many businesses in order to satisfy their meeting requirements. They are, however, limited by their size, competitive pressures from more influential vendors, geographic reach and/or financial circumstances. Some have chosen a niche strategy (for example, regional vendors with a local focus, or targeted functionality such as premises-based videoconference room solutions).

Context

Meeting solutions are often purchased by departments and lines of business. Application leaders in the digital workplace responsible for collaboration, real-time technology and infrastructure should:

- Ensure desirable collaborative user experiences by first determining the types of meetings held by their organization.
- Prioritize ease of use by selecting technologies and collaborative capabilities that will be accessible to and appreciated by both the meeting organizers and their attendees.
- Engage technical architects to map out a future architecture with respect to real-time technologies.
- Influence sourcing/procurement officers to ensure that future investments in real-time technologies are aligned and can be integrated with the established architecture.

Meeting solution decisions should be made together with other decisions about communications and collaboration infrastructure.

Market Overview

The meeting solution market is composed of a diverse set of vendors vying to satisfy the widening set of meeting and collaboration use cases typically found in organizations of all sizes. Given the dynamic nature of the meeting solution market, application leaders responsible for communications and collaboration have a rich variety of solutions to choose from. Furthermore, buyers for both whole enterprises and lines of business can select from freemium, best-of-breed stand-alone and bundled software and hardware offerings to suit a range of needs, from the smallest online meeting to the largest webcast.

Vendors in this Magic Quadrant include:

- Vendors with branded endpoints for the conference room mated to their cloud or premises-based meeting or UC solution – Avaya, Cisco, Huawei, Lifesize, Quanshi, StarLeaf and TrueConf.
- Meeting solution vendors with services delivered from mainly a public cloud infrastructure, without their own conference room hardware – BlueJeans by Verizon, Kaltura, LogMeIn, Pexip and Zoom.
- Business application vendors – Adobe, Google and Microsoft.

Buyers tend to gravitate toward one of these groups when selecting vendors to investigate, based on related IT investments and services, preexisting relationships, brand awareness or buying center.

Complete meeting solutions enable richness of information and interaction by combining messaging, content and screen sharing, video and audio.

Meeting solution vendors are responding to buyers' evolving needs by delivering:

- New designs based on ease of use for simplification of host controls, quick joining to meetings, and integration with conference room systems.
- Making host controls more evident in the UI to ensure security settings are within easy reach and turned on to avoid uninvited guests from joining the meeting or sharing inappropriate content.
- Blended asynchronous (messaging, content, scheduling, tasks, recordings) and synchronous (voice, audio, screen sharing) collaboration in persistent rooms or workspaces.
- Equal capabilities across diverse endpoint types, from group video system codecs to desktops, laptops (through browsers or clients), smartphones, tablets and so on.
- Transcription and language translation for delivering webinars, town hall meetings and quarterly business reviews.
- Artificial intelligence (AI)-influenced technologies that improve the videoconference room experience by automating the meeting join and content sharing processes.
- Optimization of delivery to enterprise networks – for example, by supporting security via a virtual private network (VPN) or broadcast via a content delivery network (CDN).
- Visibility into the enterprise video estate, with integrated management and reporting software providing information on meeting solution performance and usage.
- Integration with related collaboration investments, including unified communications and collaboration (UCC) and cloud office.
- Pricing models that span a range from low-end freemium to high-end premium services.

Evidence

- Meeting Solutions Magic Quadrant vendor survey
- Vendor briefings
- Many inquiry calls with meeting solution buyers

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.

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.

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