Magic Quadrant for Meeting Solutions

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Initiatives: Digital Workplace Applications

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.

This Magic Quadrant is related to other research:
Critical Capabilities for Meeting Solutions
View All Magic Quadrants and Critical Capabilities

Strategic Planning Assumptions

By 2024, the virtual visual canvas will become the center of 30% of meeting experiences, up from 5% today, as focus shifts to enabling collaboration equity to drive interactive and dynamic engagement.

By 2025, 50% of all enterprise virtual events will be held on the video meeting platform commonly used by the organization every day.

Market Definition/Description

Gartner's view of the meeting solutions market is focused on transformational technologies or approaches delivering on the future needs of end users. It is not focused on the market as it is today.
In the typical business context, meeting solutions are defined as collaboration tools that support interactions between participants for daily teamwork, presentations, education and webinars. Gartner sees demand for meeting solutions to be applied more often for use cases such as online city council meetings, virtual courtrooms, telehealth 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 through API and software development kit (SDK) support programs to accommodate the integrated workflows and data sharing to support these scenarios.

A few of the vendors in this market are adapting their offerings — making them more modular and consumable through different delivery channels, touchpoints and modalities. This strategy addresses an organization’s desire to deliver more contextualized and personalized application experiences for their employees and customers. Gartner refers to this emerging application delivery model as the “composable enterprise,” which defines organizations that can innovate and adapt to changing business needs through the assembly and combination of packaged business capabilities.

Organizations with complex needs typically use separate meeting solutions for informal collaboration (among users within the same team or project) and 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 who are responsible for digital workplace applications deploy meeting solutions to:

- Reduce geographic barriers for intraorganizational, customer and community communications
- Increase engagement for remote workers and improve team cohesiveness by using video and virtual visual canvases
- Ensure greater business continuity in times when employees are separated from each other and the business for any reason
- Reduce business travel and expenses
- Support work from home on a full- or part-time basis
- Educate students in multiple locations
- Deliver corporate or departmental virtual events, such as employee town hall meetings and webinars
Automate the recording and transcribing of meeting discussions, action items raised and decisions reached
Figure 1. Magic Quadrant for Meeting Solutions

Source: Gartner (October 2021)
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 a managed service. Adobe's sales and service operations are geographically diversified. Customers consider Adobe Connect for their remote learning and training and webinar scenarios due to its robust feature set and customization options. The vendor's three-year vision for Connect is to continue to pursue the enterprise, government and education segments with promising innovations such as an embeddable HTML client that allows users to launch Connect experiences from inside other relevant applications.

Strengths

- **Growing adoption:** Adobe Connect adoption saw rapid growth over the past year due to its cross-functional strategy and execution across the scope of its popular application suite. For example, Adobe Connect is now better-aligned with Digital Learning Solutions for the education and commercial training market segments.

- **Diverse deployment options:** Adobe offers Adobe Connect along with its broad suite of business applications in a variety of deployment options, including premises-based, around the world. This assures Adobe's security-sensitive customers that the configuration can be tailored and support for Adobe Connect is available where needed.

- **Experience customization:** Gartner client inquiry service users and Peer Insights reviewers have given Adobe Connect high praise for product flexibility, experience customization and breakout rooms.

Cautions

- **Missing advanced features:** Adobe has yet to implement certain innovations available in competitor meeting solutions, such as virtual meeting assistants, its own integrated digital whiteboard application and a native workstream collaboration application.

- **Targeted use cases:** Given its focus on particular vertical markets and associated meeting scenarios, Adobe Connect can be complex for end users to manage for informal, unstructured meeting scenarios.

- **High cost:** Adobe Connect is often priced higher than competitors’ meeting solution offerings for configurations of comparable scope and scale.
Avaya

Avaya is a Visionary in this Magic Quadrant. Avaya offers Spaces, which is part of the Avaya OneCloud unified communications as a service (UCaaS) solution. Spaces is a workstream collaboration platform with integrated live meeting capabilities. Customers consider Spaces when wanting a collaboration platform that satisfies a variety of internal and customer-facing use cases. Spaces can be deployed as SaaS, premises-based software, cloud-premises hybrid services or 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 modernize customer experiences through its native workstream and contact center product lines.

**Strengths**

- **Delivers a unified experience:** Spaces is built to capture the customer who desires a unified experience across meetings, contact center, workstream collaboration and voice services. Avaya offers Spaces with an abundant set of deployment options to satisfy a wide variety of market segments.

- **Geographic reach:** Avaya's product deployment and sales organizations have global reach, ranging from small and midsize businesses to very large enterprises and the public sector. This makes the vendor an option for multinational enterprises, where more limited offerings cannot compete.

- **Streamline complex workflows:** Based on user feedback during Gartner’s inquiry service and from Peer Insights reviewers, Avaya gets high ratings for its ability to streamline complex workflows with Spaces’ workstream APIs and for ease of integration.

**Cautions**

- **Limited market adoption:** Avaya Spaces is not often considered by buyers when evaluating workstream collaboration applications or meeting solutions. This creates challenges when Spaces’ users want to federate with other organizations.

- **Not suitable for all virtual events:** Spaces has maximum scaling of 1,000 meeting participants and a more limited feature set relevant for virtual events (for example, no content delivery network partners, no ability to tag important moments, no video highlights and no polling).
BlueJeans by Verizon

BlueJeans by Verizon is a Visionary in this Magic Quadrant. Its Meetings product is focused on the enterprise segment, particularly within Verizon’s customer base. BlueJeans’s sales and service operations are geographically diversified, but with a focus on the U.S. and Europe. Verizon customers consider BlueJeans Meetings due to its integration with the broader Verizon unified communications (UC) offerings, and customers in higher learning and healthcare consider BlueJeans due to its vertical-specific offerings. BlueJeans’s three-year vision for Meetings is to deepen its integration with Verizon’s infrastructure to deliver higher quality, to improve its vertical offerings, and to use APIs and software development kids (SDKs) to extend into the CPaaS market.

Strengths

- **Expanding use cases:** BlueJeans by Verizon can address a variety of use cases, including telehealth, virtual events and classrooms, everyday meetings, and the mobile enterprise. It addresses these scenarios using its native feature set and mobile network, and through integrations with Microsoft Teams, Slack, and hardware for both meeting rooms and desktops.

- **Security and reliability:** BlueJeans offers a complete set of security attestations, including ISO 27001, HIPAA and Payment Card Industry Data Security Standard (PCI DSS). It also offers fine-grained controls on data sovereignty, including both at rest and in transit. Furthermore, it leverages Verizon’s network and cloud infrastructure to make strong uptime and quality guarantees.

- **Robust set of capabilities:** Gartner client inquiry service users and Peer Insights reviewers praise BlueJeans Meetings for a reliable and secure experience. Most notable are a feature set including breakout rooms and in-app intelligence, and compatibility with other popular applications and devices.

Cautions
Limited market adoption: The relatively small size of BlueJeans’s customer base may create challenges when inviting guests that are likely unfamiliar with the service.

Cloud-only offering: BlueJeans Meetings is only offered as a multitenant public cloud service, which renders it inappropriate for customers who desire single-tenant, private cloud, on-premises or hybrid deployments.

Pace of adding new features: While BlueJeans and Verizon continue their journey to bring forward new bundled offerings, leading competitors have advanced on communication capabilities at a quicker pace over the past 12 months.

Cisco

Cisco is a Leader in this Magic Quadrant. Cisco offers Webex-branded collaboration products and services that address a variety of use cases, including meetings, events and education classes. Webex has consolidated Webex Teams and Webex Meetings into a single app that is offered as a part of the Webex Suite. 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 delivering collaboration experiences that improve hybrid work outcomes by blending asynchronous and synchronous communications for both remote and on-site employees.

Innovation: Cisco has demonstrated a renewed commitment to innovation and differentiation within the Webex collaboration portfolio over the past year. Its own engineering efforts have been enhanced by strategic acquisitions in the areas of artificial intelligence, audience interaction, hybrid event management, and improved audio and video experiences.

Growing portfolio of specialized solutions: Cisco is competing more effectively by widening its meeting portfolio to address a variety of use cases, such as telehealth, legislative sessions, virtual events, virtual classrooms and hybrid meeting scenarios that result from hybrid work models.

Secure and reliable: Based on user feedback during Gartner’s inquiry service and from Peer Insights reviewers, Webex Meetings is appreciated for its reliability, strong security and the newly converged Webex app experience.
Caution

- Needs a change in perception: Though Cisco Webex is a robust meeting solution, some buyers perceive Webex as a legacy offering that trails on factors like ease of use and value.

- Offering process: Cisco's offering process continues to evolve. Its latest effort to simplify the collaboration licensing models, named Flex 3.0, has taken time to roll out across all license types and the contract renewal processes.

- Reseller partners have diversified: Cisco's long-standing Webex reseller partners have added popular competitors to expand and diversify its offerings. This is creating challenges for Cisco in a more competitive market environment.

Google

Google is a Challenger in this Magic Quadrant. The Google Workspace 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 meeting solutions for schools, public sector, nonprofit organizations and businesses that need to support hybrid workflows. Google is also committed to meeting equity and will strive to ensure feature parity across web, mobile apps and hardware endpoints.

Strengths

- Google ecosystem: Google Meet's presence as part of the Google Workspace bundle makes it one of the most cost-effective, easy-to-access, enterprise-class options for common meeting scenarios in this report.

- Increased Google Meet focus: Google is placing significant importance on the success of Meet, both as a consumer product and as a tool for enterprises subscribing to Google Workspace. It is expected that Google will continue to invest in its Meet collaboration capabilities and close relevant feature gaps against leading competitors.

- Ease of use: Gartner client inquiry service users and Peer Insights reviewers have stated they enjoy Google Meet's simplicity and ease of use, good audio/video quality, and seamless integration within Google Workspace.

Caution
Limited scale for interactive events: Google Meet is limited to 250 participants per meeting. This is sufficient for most meeting scenarios, but is insufficient for larger, interactive corporate events.

Limited third-party integrations: While Google Meet is deeply integrated into Google Workspace, integrations for third-party tools (such as CRM, scheduling or room booking applications) are limited, and there is no way to search the Google Workspace Marketplace for integrations with Meet.

Lackluster vertical market solutions: Google Meet is primarily used either as a generalized internal collaboration application or in virtual classroom settings. Organizations typically supplement the use of Meet with another meeting solution that offers more feature-rich solutions and integrations that address complex vertical market scenarios.

GoTo

GoTo by LogMeIn is a Challenger in this Magic Quadrant. In previous meeting solution Magic Quadrant research, the vendor was branded as LogMeIn. GoTo offers GoToMeeting, GoToTraining, GoToWebinar and join.me to match enterprise needs for a range of meeting scenarios. It also has videoconferencing room options with its hardware partners through the GoToRoom offering. GoTo’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. GoTo’s vision for the next three years focuses on growing its solutions as part of a broader UC portfolio through its GoToConnect offering. It also plans to expand its capabilities to support “anywhere” workers, including frontline workers.

Strengths

Product strategy: GoTo provides a consolidated experience for scheduling, chat, personal rooms and meeting artifacts within the GoToMeeting Hub. It has also developed strong partnerships with several device manufacturers and other companies in adjacent markets, and it maintains robust APIs for integration.

Large broadcasts and events: GoTo can match or exceed the capabilities of most competitors in terms of meeting volume, broadcast audience size and support resources. New licensing options for GoToWebinar and a new virtual events offering further solidify its lead in this area.
Feature richness for meetings and webinars: Gartner client inquiry service users and Peer Insights reviewers have given high marks for GoTo’s intuitive host controls, feature richness and audience interaction features for webinars.

Cautions

Visual collaboration: GoToMeeting continues to lag market leaders in visual collaboration capabilities and is limited to basic drawing and annotations. Competitors are investing in richer integrated digital whiteboarding features or stand-alone products to better support visual collaboration across a hybrid workforce.

Market responsiveness: Aside from new licensing bundles and some additional marketing efforts, GoTo’s product and go-to-market strategy are more focused on its broader UCaaS bundle than on its meeting solution. This has caused it to fall behind its more aggressive meeting solution competitors.

Less relevant with larger enterprises: GoTo is primarily adopted by small to midsize organizations. While this represents a significant market opportunity for GoTo, larger organizations prefer its bigger, well-known competitors.

Huawei

Huawei is a Challenger in this year’s 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 exception of North America. Huawei’s three-year roadmap includes transitioning more of its customers from its current premises-based Huawei solutions to the cloud, as well as introducing more entry-level and personal video endpoints.
Account expansion: Huawei’s number of accounts and paid meeting hosts exceeds those of most of its competitors in this report. This service expansion fuels Huawei’s ability to deliver solutions at scale, positioning it to successfully address a broad range of customer deployment requirements.

Rich feature set: Huawei’s meeting platform includes features supporting a broad range of meeting requirements. These include capabilities not available from a number of its competitors, such as in-meeting content markup and editing, co-browsing, and in-room speech recognition.

Intelligent group video systems: Huawei’s extensive portfolio of video endpoints for conference rooms both large and small, in combination with its meeting software, deliver advanced meeting experiences. These features include on-screen name tagging, automatic speaker framing, acoustic baffling and extensive interfaces for conference room appliances.

Limited geographic diversification: Huawei is a high-tech economic force in China and other Asia/Pacific countries, with growing influence in South America and Eastern Europe for its meeting solution offerings. However, the company has very limited business presence in North America and Western Europe at this time, restricting its ability to sell and support its meeting solution portfolio in those areas.

Narrow whiteboarding options: At a time when interest is very high for digital whiteboarding (virtual and hardware-based) that supports advanced collaboration, Huawei has restricted options. It does provide an SDK for customizing integration with hardware digital whiteboards, but has limited integration with popular whiteboarding applications.

Virtual events: Huawei’s meeting solution lacks some of the innovative features required for virtual events that its competitors possess, such as the ability to tag important moments during the live meeting or the ability to create meeting highlight reels showing key moments.
Kaltura

Kaltura is a Visionary Player in this Magic Quadrant. Its Kaltura Meetings, Virtual Classroom and Virtual Events 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 is to power video experiences that enable unique interactions for more effective collaboration across a variety of meeting scenarios. It sees an opportunity to embed its video capabilities into preferred business applications through its APIs, analytics engine and associated support programs.

Strengths

- **Innovation in more complex scenarios:** Kaltura is adept at meeting market demand for expanded video experiences. Virtual/hybrid events of all types are within its capabilities while other vendors can only scratch the surface. Its ability to blend recorded/streamed video content with live video meeting experiences is another one of its strengths.

- **Deployment options:** Kaltura supports a wide variety of deployment options and integrates with several popular business applications and meeting solutions covered in this Magic Quadrant. Buyers value this flexibility when considering how to utilize Kaltura’s product suite within their organization.

- **Integrated and customized user experiences:** Based on user feedback during Gartner’s inquiry service and from Peer Insights reviewers, Kaltura gets high ratings for its response to customer needs, ability to support customizations and access to API libraries to create integrated workflows.

Cautions

- **Lacks broad market adoption:** Kaltura’s meeting services are not widely adopted for everyday generalized meeting use cases. This is likely to create unfamiliar experiences with joining meetings and sharing content for participants outside of the customer organization.

- **Limited geographic distribution channels:** While Kaltura has product availability in many markets, it lacks the depth of sales/service partners and distributors often found with the leading players in this market segment. This go-to-market limitation is further complicated by its lack of a mature e-commerce strategy.
Priced for complexity: Kaltura’s pricing is considered high relative to popular competitors in the meeting solution market. Buyers wanting to solve more complex scenarios may find Kaltura’s pricing better aligned with expectations than those wanting a modest, informal meeting application.

Lifesize

Lifesize is a Niche Player in this Magic Quadrant. Its cloud-based videoconferencing meeting solution supports a range of requirements for digital workplace collaboration. Lifesize offers its meeting solution exclusively in the cloud. It also offers the Icon series of video endpoints for conference rooms. Lifesize’s sales and service operations are geographically diversified. Its three-year plan includes better immersive meeting experiences with its 4K group video systems, expanded interoperability of its video endpoints with leading meeting platforms and greater security features with geospecific regulatory compliance.

- **Integrated video endpoints:** Lifesize has a solid 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.

- **Multiservice meeting support:** With Lifesize Connect, Lifesize positions its customers to take full advantage of the emerging multiplatform, bring-your-own-device (BYOD) meeting landscape. This enables the use of 4K Lifesize Icon room systems with Windows and Mac devices to join meetings hosted on any third-party cloud video app or service.

- **Attractive licensing options:** Lifesize offers a rooms-as-a-service program, which helps customers more easily plan, budget for and scale their video systems. A simple operating expense subscription model provides meeting room hardware, cloud service, maintenance and support for a predictable, fixed price.

Cautions

- **Declining market adoption:** Enterprise customers have shown less inclination to include Lifesize in their evaluations for meeting solutions, with other competitors overshadowing Lifesize for buying organizations’ consideration.
Microsoft is a Leader in this Magic Quadrant. Its Microsoft Office 365 bundle includes Microsoft Teams for meetings with up to 1,000 participants, and Microsoft Teams Webinar for broadcasts for up to 10,000 attendees. Microsoft offers Skype for Business Server for on-premises deployments, although hybrid deployment models are no longer supported following the sunsetting of Skype for Business Online in July 2021. Its sales and service operations are geographically diversified. Microsoft's three-year vision for Microsoft Teams aims to expand capabilities to support hybrid workers, to innovate with new mixed reality capabilities powered by Microsoft Mesh, and to provide new customization and business process automation options.

**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 continues to advance Teams’ meeting capabilities at a rapid pace. In the past year, Teams has seen significant improvements to its capabilities, including expanded webinar capabilities, intelligent conference room innovations, surveying and gestures for audience engagement, a new presenter mode, and live caption and transcription improvements.

- **Cost-effective collaboration**: Based on feedback during Gartner's inquiry service and from Peer Insights reviewers, organizations enjoy Microsoft Teams cost-effective, valuable collaboration capabilities when used in concert with the Office 365 suite and its rich set of new features.

**Cautions**

- **Advanced features absent**: Although its meeting application has a range of expected features, more advanced capabilities are not part of the native Lifesize offering. These missing features include recorded meeting transcription/captioning, live and recorded meeting language translation, and the ability to tag important moments during the meeting.

- **Limited deployment options**: Unlike 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.
Pexip

Pexip is a Challenger in this year’s Magic Quadrant. Pexip’s 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, on-premises software or a hybrid configuration. Pexip’s virtualized video infrastructure software can be deployed on-premises or in the cloud. Its sales and operations are global. Pexip three-year plan calls for expanded collaboration support for hybrid work arrangements, and increased sales and marketing coverage in core markets as well as in new geographies such as Latin America and India.

Strengths

- **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.

- **Robust data sovereignty:** With Pexip Private Cloud, customers choose any one or combination of geographic regions for a dedicated cloud instance of their meeting transactions. Ongoing operational data remains under the sole control of the customer, without burdening the customer with the complexity or management load of running their own system.

**Administration complexity:** Microsoft Teams is an integral part of Office 365. While this has many benefits, it also brings with it significant governance and other administration challenges. Teams administrative controls, policy settings, guest access controls, and reporting and monitoring tools remain split across multiple dashboards.

**Used for internal collaboration more commonly than external:** Microsoft Teams gained its traction in the market with internal collaboration scenarios. While it offers various external collaboration features (external guests in channels, breakout rooms for classes, webinars) organizations often deploy other video meeting services for more complex customer engagements and vertical market solutions.

**E-commerce model and licensing:** Microsoft offers a wide array of licensing packages and bundles aimed at various market segments with optional add-on licensing for certain capabilities not included in specific tiers. The complexity of its offerings, including overlapping free and paid tiers, can be vexing for some customers.
Quanshi

Quanshi is a Niche Player in this Magic Quadrant. Its MeetNow product is available as a cloud-based SaaS offering, on-premises, in a hybrid configuration or as a managed service. MeetNow's business is primarily focused in greater China, but is also offered in Japan, Europe and North America. Customers in Greater China consider Quanshi when a basic meeting solution with specific integrations (like WeChat and Ding Ding) is desired. Quanshi's three-year vision for MeetNow is to enhance both its OnShow offering for online events and its Metcom offering for online education, and to provide SDKs to embed high-quality audio and video in applications.

Strengths

- **Deployment options**: Quanshi offers a complete set of deployment options, allowing customers the flexibility to deploy fully on-premises, fully in the cloud or in a hybrid mode.

- **Security**: MeetNow offers a complete set of security features, including some less commonly offered like content scanning and customer-controlled encryption key management.

Cautions

- **Advanced feature limitations**: Pexip is missing certain key features in its software that the market increasingly relies on. Missing items include meeting recording transcription and captioning, recording language translation, native workstream collaboration features, and creating meeting highlight reels showing key moments.

- **Lack of virtual whiteboard options**: At a time when many organizations expect basic collaboration features such as virtual whiteboarding, these capabilities are missing from Pexip's meeting solution.

- **Needs to be relevant beyond interoperability**: While Pexip's technology is useful when solving complex video interoperability issues, organizations typically rely on other popular meeting solutions for broader end-user communication and collaboration requirements.
**Integration with mobile messaging:** According to feedback received during Gartner’s inquiry service and from Peer Insights reviewers, end users particularly compliment Quanshi’s MeetNow for ease of use, integration with WeChat and good customer support.

**Cautions**
- **Limited geographic reach:** At this time, Quanshi’s business is almost completely based in Greater China, which renders it unattractive for consideration outside of this region.
- **Few integrations:** Outside of WeChat and Dingding integrations, which are unique to this vendor, Quanshi does not report any other integrations with significant third-party enterprise software.
- **Limited customization options:** Quanshi does not offer a robust set of customization options for meeting host controls and guest permissions when compared to leading meeting solutions in this market.

**StarLeaf**
StarLeaf is a Visionary in this Magic Quadrant. Its meeting platform is primarily available as a cloud-based SaaS offering, but can also be purchased as a managed service, on-premises or in a hybrid configuration. StarLeaf’s business is primarily focused in the U.K. and Europe, but is available worldwide. Customers primarily consider StarLeaf when wanting a high-quality experience that is simple, secure and consistent across desktops, rooms and mobile devices. StarLeaf’s three-year vision for its meeting platform involves focusing on ease of use, particularly for frontline workers; adding features to enhance collaboration equity in the new hybrid workplace; and enhancing interoperability with other meeting solutions and hardware.

**Strengths**
- **Room systems:** StarLeaf offers room systems at up to 1080p resolution that, in addition to supporting meetings, interoperate with several competing meeting solutions, allowing StarLeaf users to join third-party meetings from rooms with relative ease.
- **Security and reliability:** StarLeaf operates its service in privately owned data centers, which renders it immune to outages caused by cloud service providers. StarLeaf also offers a complete set of security attestations, including ISO 27001, HIPAA and PCI DSS. It also offers fine-grained controls on data sovereignty both at rest and in transit.
Solid operations and support: Gartner client inquiry service users and Peer Insights reviewers speak highly of StarLeaf’s meetings for ease of use, top-notch security features, consistent quality and responsive customer support.

Cautions

- **Limited feature set**: StarLeaf’s meetings service lacks several key features supported by many other meeting solutions, including whiteboarding, transcription and translation, and support for breakout rooms and content delivery networks (CDNs).

- **Relatively small market adoption**: The relatively small size of StarLeaf’s customer base may create a challenge for outside parties to join a meeting service that they are likely unfamiliar with and for which they have not installed the client software.

- **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. Its Server product is primarily offered as a premises-based installation, but it is also available in cloud and hybrid deployments. Customers primarily consider TrueConf when they require a premises-based deployment for security or availability reasons. TrueConf’s business is primarily based in Eastern Europe, although service delivery capabilities are available globally. TrueConf’s three-year vision includes providing a secure messaging and team collaboration platform, launching a new version of TrueConf Enterprise solution for large-scale companies and telcos, and enhancing its cloud-based videoconferencing offering based on the new TrueConf Enterprise architecture.

Strengths

- **Premises-based focus**: TrueConf’s strong commitment to on-premises installations stands out in a field that mostly eschews this model. Customers that are highly security-focused, or that cannot use the cloud due to availability or bandwidth issues, will find this enticing.

- **Unified user experience**: TrueConf offers a videoconferencing and messaging platform designed to support collaborative work. The service is available in its native application, with all settings and call and message history synchronized across all connected devices.
**Easy and reliable installation:** According to feedback received during Gartner's inquiry service and from Peer Insights reviewers, IT organizations particularly compliment TrueConf Server for ease of deployment, dependable stability and tighter administrative controls due to its premises-based installations.

**Cautions**

- **Lack of feature differentiation:** TrueConf Server possesses few features not commonly supported by other vendors in this market, leaving it without a strong differentiator from a user experience perspective.

- **Education scenarios:** TrueConf Server lacks features that are typically required in education scenarios: breakout rooms, Q&A management, integrated testing, observing whether users are looking at another window, support for external whiteboard applications and editing of recorded video.

- **Limited integration options:** TrueConf Server offers limited options to integrate with popular cloud-office suites — principally focused on email for meeting scheduling. It also lacks integration with CRM and marketing applications, which makes it less useful for organizations that want to host virtual events.

**Zoom**

Zoom is a Leader in this Magic Quadrant. It offers Zoom Meeting and Zoom Video Webinar solutions, along with Zoom Rooms’ 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 expanded collaboration support for hybrid workplaces, expanded integration of its meeting solution into other applications through its Developer Platform and increased value capabilities for key vertical industries.
Cautions

- **Extensive market traction:** Zoom’s popularity continues unabated. Organizations value Zoom’s frictionless, video-first approach, as well as the wide range of deployment and licensing options. Zoom’s global availability and support reach also contribute to its broad market adoption.

- **Support for hybrid workplaces:** Zoom’s approach to optimizing hybrid meeting arrangements includes features such as its Smart Gallery (through its Zoom Rooms), where each person gets their own video tile, even those grouped in conference rooms. Its Zoom for Home offering supports home office workers by enabling them to use personal devices or bundled Zoom hardware partner devices designed specifically for home working.

- **Easy to buy, deploy and use:** Gartner client inquiry service users and Peer Insights reviewers regularly point out Zoom’s ease of use for end users, IT and procurement; robust host controls; and its cost-effectiveness versus previously used meeting technologies.

**Cautions**

- **Contract renewals can be challenging:** Many organizations adopted Zoom at the onset of the pandemic to address immediate conferencing needs as remote work realities took hold. With return to the office and hybrid work models being adopted in 2021, some organizations want to reduce their Zoom deployments. Contract renewals can then become challenging, as there is no simple process to allow for that.

- **Growing pains:** The combination of Zoom’s rapid growth and its direct customer engagement model is testing the vendor’s ability to stay attentive to its customers’ needs.

- **Confusion over target market:** Zoom has been actively promoting and pursuing both enterprise- and consumer-oriented video engagements across a wide variety of opportunities. This has caused some organizations in market segments that have a higher sensitivity to topics like security and data privacy to question whether Zoom is more interested in their enterprise customers or consumers.

Inclusion and Exclusion Criteria

Gartner uses the same criteria for both the Magic Quadrant and Critical Capabilities.
To qualify for inclusion, a vendor’s meeting solution must have at least the following functionality:

- **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:** Meeting attendees can exchange real-time textual messages with other participants or the presenter using an instant messaging (IM)-like interface for both private 1-to-1 and group chat.

- **Basic security:** Encrypted data in transit and at rest, password-protected meetings, and host controls that reveal meeting attendees, as well as mute, block and drop those attendees.

- **Integrated voice over Internet Protocol (VoIP) audio:** To remove or reduce the need for telephone-based audio, qualifying solutions 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.

- **Browsers:** The solution must support the end-user preference to join meetings in a browser, rather than force users to download a software application. Additionally, the browser delivery must support audio, video and screen-sharing functions.

- **Mobility:** The solution must offer specific support for audio, video and content sharing from mobile devices and tablets.

- **Digital whiteboards:** The solution must support shared virtual whiteboard features to enhance visual collaboration. Meeting attendee users must be able to annotate on their shared screens using virtual markers and erasers, lines, circles, arrows, diagram shapes, etc.
The vendor must develop and market its primary meeting solution, not only resell a meeting solution produced by another company. Additionally, the vendor must illustrate that at least 80% of its total meeting solution revenue in the last fiscal year was attributed to selling its own meeting solution — defined as offering the required functionality as shown above.

The vendor must illustrate that the revenue generated from selling its own meeting solution comprises software sales that are equal to at least 30% of the total revenue for its meeting solution. This Magic Quadrant does not include vendors that generate more than 60% of their meeting solution revenue from hardware sales.

The vendor’s meeting solution must have paid accounts that generated revenue in FY20 in at least five of the following global regions with referenceable customers: North America, Latin America, the U.K., Western Europe, Eastern Europe (including Russia), China, Japan, India and other countries in the Asia/Pacific region.

Sales and marketing efforts connected with the solution must not be limited primarily to a particular vertical or horizontal process (such as training).

| 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 (quality of service). |
| Meeting scale: 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. |
| Webinar scale: The solution must support livestreaming of large meetings or webinars with more than 1,000 concurrent participants. Additionally, the solution must support integration with content delivery networks for livestreaming of large-scale webinars. |
Evaluation Criteria

Ability to Execute

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 are weighted highly, as we evaluated both the scale and security characteristics of the vendors’ cloud-based operations.
Table 1: Ability to Execute Evaluation Criteria

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Source: Gartner (October 2021)

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 offering (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

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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 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 solution usage exploded in 2020 and 2021 due to the forced isolation caused by the arrival of the coronavirus pandemic. The leading vendors in this market segment reported unprecedented demand for its meeting solutions as businesses, educational institutions and public sector agencies sought effective ways to help their employees stay connected and remain productive while at home. Organizations needed to act quickly to keep operations running and sought easy-to-use video meeting solutions to emulate in-person experiences.

Organizations around the world are now evaluating how to deliver productive hybrid work environments. Within that broader context, one of the most-discussed topics is the hybrid meeting experience in which some participants are in the office conference rooms and others join remotely. In the past, this situation usually meant that people joining from the conference rooms dominated the conversation, while the people joining remotely often were ignored or their contributions marginalized. This challenge feels new to digital workplace application leaders, however, because their organizations have experienced fully virtualized meeting experiences for the first time over this past year. Their goal is to retain the benefits of “collaboration equity” seen when all meeting participants join the meeting online, while adding the complexity of conference room technology and in-person user behaviors.

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:
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, GoTo, Kaltura, 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 and appliances 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 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.
Evidence

- Magic Quadrant for Meeting Solutions vendor survey
- Vendor briefings
- Many inquiry calls with meeting solution buyers
- Gartner's Peer Insights

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.

Document Revision History

Magic Quadrant for Meeting Solutions - 12 October 2020
Magic Quadrant for Meeting Solutions - 17 June 2020
Magic Quadrant for Meeting Solutions - 4 September 2018
Magic Quadrant for Meeting Solutions - 18 September 2017
Magic Quadrant for Web Conferencing - 10 November 2016
Magic Quadrant for Web Conferencing - 28 December 2015
Magic Quadrant for Web Conferencing - 9 December 2014
Magic Quadrant for Web Conferencing - 10 December 2012
Magic Quadrant for Web Conferencing - 5 December 2011
Magic Quadrant for Web Conferencing - 4 November 2010
Magic Quadrant for Web Conferencing - 29 July 2009
Magic Quadrant for Web Conferencing - 29 July 2008
Magic Quadrant for Web Conferencing, 2005 - 29 September 2005

Recommended by the Authors

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

How Markets and Vendors Are Evaluated in Gartner Magic Quadrants
Hybrid Meeting Success Depends on Collaboration Equity for All Participants
Building Collaborative Video Conferencing for the New Hybrid Workplace
Make Your Meetings in a Hybrid Workplace More Effective
Technology to Support Collaboration for a Hybrid Workforce
Expert Insight Video: How to Enable Visual Collaboration and Support a Distributed Workforce
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