Competitive Landscape: Contact Center as a Service

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Initiatives: CSP Strategy and Go-to-Market

CCaaS is a nearly $9 billion market growing at 19% fueled by enterprises seeking to improve customer experience and reduce cost. Technology and service providers need to understand the evolving competitive landscape to identify and exploit areas of differentiation.

Overview

Key Findings

- The contact center as a service (CCaaS) market represents a growth opportunity as enterprises plan for customer service operational efficiency improvements with a focus on automation and customer experience enhancements.
- The CCaaS market includes a mix of mainstream providers and emerging market participants — each with inherent competitive advantages and challenges associated with the breadth and depth of customer service and support delivery capabilities.
- CCaaS providers' unique segment positioning enables opportunities to differentiate through the ability to handle end-user complexity, support agile third-party application integration or offer broad customer service and support capabilities.

Recommendations

Technology and service providers positioning CCaaS capabilities must:

- Expand revenue opportunities by investing in customer service and support initiatives that enable automated interactions and focusing on customer experience improvements via journey mapping.
- Elevate competitive positioning in the CCaaS market by building and promoting advantageous differentiators unique to your market segment classification.

- Overcome the challenges of your competitive segment by implementing measures to close gaps (including possible funding of acquisitions) related to difficulty supporting end-user complexity, third-party application integration, broad customer service capabilities and comprehensive internal and external requirements.

Forecast Statements

The CCaaS market represents a lucrative market opportunity with end-user spending expected to grow from $8.9 billion in 2022 to $16.3 billion in 2026.

Gartner projects the CCaaS market to accelerate at an 18.3% compound annual growth rate during 2022 to 2026.

While cloud represents an estimated 27.5% of global agents in 2022, penetration is expected to accelerate to nearly 50% of global agents in 2026.

Analysis

Contact center as a service (CCaaS) growth is being fueled by multiple factors, including directives to improve the efficiency of existing customer service operations and enhance the customer experience. Decommissioning of data enters and unified communications (UC) infrastructure is also pushing enterprises to make new contact center replacement decisions. As a result, cloud-based customer services capabilities with support for voice and digital channels are gaining investment momentum. Growth will primarily be generated from legacy contact center environments migrating to the cloud, but will be boosted by some net new voice and digital customer service capability investments from small and midsize businesses (SMBs). Regional market dynamics vary significantly with emerging market regions, especially those with regulatory restrictions or cultural cloud adoption barriers, displaying lower cloud migration rates.

The CCaaS market is composed of a diverse mix of providers with unique contact center entry points and differentiators. The most common CCaaS market participants are cloud-native contact center providers (those with roots in multitenant cloud contact center delivery). Cloud-native CCaaS providers are frequently considered for customer experience projects and legacy premises-based contact center migrations. Within the heritage contact center provider category (those with premises-based contact center capabilities), providers have tried to pivot to the cloud but some have not been successful.

The CCaaS market is also composed of providers positioning CCaaS services from nonmainstream approaches. Two primary alternative approaches include customer service capabilities from:

- Unified communications as a service (UCaaS) providers (those leading with telephony or collaboration but extending contact center capabilities as add-on services)
- Communications platform as a service (CPaaS) providers (those delivering customer-service-centric building blocks as part of their CPaaS portfolio capabilities)

These two groups represent a small but growing portion of the contact center competitive landscape.

Other emerging market approaches include CRM provider expansion into the contact center platform market and digital-native customer service providers adding voice channels.

Competitive Situation and Trends

The following analysis highlights the four most common provider types of CCaaS capabilities:

- Heritage contact center providers
- Cloud-native contact center providers
- UCaaS-centric contact center providers
- CPaaS-centric contact center providers

Table 1 provides a classification of four CCaaS provider approaches and illustrates top competitive differentiators and disadvantages.

Table 1: Contact Center Provider Classification

(Enlarged table in Appendix)

	Heritage Contact Center Providers	Cloud-Native Contact Center Providers	UCaaS-Centric Contact Center Providers	CPaaS-Centric Contact Center Providers
Description	Providers with experience delivering premises-based contact center solutions that have since begun offering cloud-based contact center capabilities.	Providers with a cloud-first/cloud-only approach to contact center solution delivery.	Providers with experience delivering cloud-based unified communications services and cloud-based contact center capabilities as part of a bundled offer.	Providers with contact center expertise delivered via a developer platform contact center built through APIs/software development kits (SDKs).
Differentiators	Large, complex, regulated industry traction.	Broad customer service and support portfolio.	Comprehensive portfolio options for knowledge workers and customer service agents.	Extensive third-party integration options and flexibility.
Disadvantages	Fragmented resource allocation.	Limited legacy installed base leverage.	Limited advanced CC capabilities.	Limited out-of-the-box implementation approach.
Vendors	Cisco, Genesys	Five9, NICE	8x8, Dialpad	Amazon Web Services, Twilio

Note: The differentiators and disadvantages represented in this chart reflect some of the characteristics of a particular segment. Individual providers exhibit unique capabilities within and across segments.

Source: Gartner

Heritage Contact Center Providers

Heritage contact center providers have roots in the contact center market delivering voice-based premises contact center platforms. Most competitors in this segment are pivoting from premises-based solutions to their newer multitenant cloud platforms. Some are actively migrating customers to their cloud platform and phasing out legacy product support. Others take a slower approach to cloud migration, typically relying on private cloud hosting services to align with growing cloud demand as well as sales expansion of premises capabilities in geographies in which cloud demand has not yet peaked. Premises-to-cloud CC portfolio migrations remain difficult endeavors as cloud solutions need to be rebuilt from scratch (the software needs to be rewritten and features recreated).

In the past, many heritage contact center providers have met large enterprise requirements for advanced capabilities (e.g., digital, WEM) through separate add-on products or third-party partnerships. Increasingly, these providers will face competitive challenges in meeting advanced customer service requirements because cloud-based solutions differentiate on agility, broad application integration access and feature depth. Many CCaaS solutions have either built-in/integrated best-of-breed capabilities or integrations that rely on REST-based APIs rather than complex line code programming. Heritage contact center providers, therefore, will face challenges with integration and agility, in comparison.

Furthermore, heritage contact center providers splitting R&D, sales, marketing and support resources across multiple (legacy and cloud) solutions experience challenges competing against cloud providers that offer a single solution. Gartner increasingly expects heritage contact center providers to streamline their portfolios. In an effort to streamline product and go to market initiatives, heritage contact center provider, Genesys, announced end of life plans for its heritage multi-instance Multicloud CX solution and Cisco's CC Enterprise is in maintenance mode.

Heritage providers have an opportunity to leverage their existing customer base for expanded customer experience service extension. The existing knowledge and insight into their customers' customer service pain points can be used to craft effective go-to-market strategies.

Market Opportunities for Heritage Contact Center Providers

- During transition to cloud phase: Expand sales of dedicated cloud by aligning sales and go-to-market campaigns to large, regulated, complex, as well as emerging market contact center environments.
- Shift R&D, sales, marketing and support resources to strategic cloud platforms.
- Generate partner interest in platforms by enhancing development environments, applications marketplaces and online communities.

- Proactively migrate the base to strategic cloud delivery options by implementing a comprehensive sales, marketing, and implementation strategy.
    - Increase legacy product support and promote pricing incentives for migrations.
    - Identify change enablers within the buyer organization.
    - Offer proactive planning workshops to migrate customers.
    - Publish case studies featuring organizations that have migrated to the cloud, with an emphasis on customer experience outcomes achieved.
    - Provide implementation guides to identify risks and required steps for successful outcomes.

Cloud-Native Contact Center Providers

The cloud-native CCaaS competitive landscape is composed of providers with roots in core contact center service delivery via multitenant cloud platforms. The providers in this segment tend to have broad voice customer support capabilities and emerging digital customer service offerings. Providers vary in the depth and breadth of their workforce management, workforce engagement, omnichannel routing, conversational AI capabilities, and depth of analytics and reporting features. Cloud-native CCaaS providers are streamlined with their solution portfolios enabling a focused approach to market growth through having a concentrated focus on cloud R&D innovation and go-to-market initiatives.

In addition to solely directing resources to cloud-only initiatives, native CCaaS providers have additional competitive advantages. Demand for cloud contact center solutions has continued to gain momentum since the COVID-19 pandemic's onset with long-term indicators pointing toward agile, cloud delivery demand. As heritage contact center providers shift their portfolios to align with cloud market demands, there will be opportunities for cloud conversion of the premises contact center base. Premises-to-cloud migrations involve more comprehensive overhauls, which means that a broader range of providers will be considered for CCaaS initiatives.

Market Opportunities for Cloud-Native Contact Center Providers

- Expand geographic reach by partner ecosystem expansion in countries/regions poised for customer experience growth.

- Accelerate digital customer service R&D to capitalize on demand for digital + voice contact center initiatives. Failure to embrace digital engagement as part of the contact center suite will create declines in agent license revenue streams as interactions become more automated.
- Capitalize on growth market opportunities in sales and marketing adjacencies by positioning customer experience capabilities.
- Appeal to large, complex contact center environments poised to migrate from premises- to cloud-based contact center solutions by promoting best-of-breed capabilities across customer service and by developing programs to ease the migration from competitors' systems to yours.

UCaaS-Centric Contact Center Providers

UCaaS-centric contact center provider competitors typically have expertise extending broader business communications services (telephony, messaging, conferencing) to employees across organizations but secondarily have developed some contact center capabilities to meet the requirements of employees with customer-centric roles. The extension of CCaaS services as part of UCaaS bundles also boosts provider average selling prices (ASPs) and delivers higher margin user licenses. UCaaS/CCaaS bundles typically experience traction with deployments of 250 agents or less.

UCaaS contact centers emerged as voice-centric solutions but now typically include omnichannel routing along with customer analytics. AI capabilities are increasingly infused within these various contact center components but are provisioned in a way that does not require extensive consulting and customer experience project implementation services. Many UCaaS/CCaaS providers also maintain partnerships with external contact center providers when customer requirements stretch beyond their native contact center capabilities. For example, 8x8 may position Genesys when capabilities extend beyond 8x8's native CCaaS capabilities.

The core demand for combined UCaaS/CCaaS comes from SMBs where resource constraints (financial and personnel) prevent the adoption of stand-alone, comprehensive contact centers. Demand for customer service capabilities is accelerating across SMBs as customer interaction volume accelerates and as customer service shifts away from in-person to remote engagement. Furthermore, customer retention and new customer acquisition are top priorities across small businesses with leaders viewing insight on customers and effective servicing of the customer base as business differentiators.

Market Opportunities for UCaaS-Centric Contact Center Providers

- Capitalize on interest in combined UCaaS/CCaaS services by aligning sales and go-to-market resources with the purchasing priorities and adoption preferences of SMBs. See 4 Strategies for Contact Center as a Service Vendors to Capitalize on SMB Growth Opportunities.

- Promote the price-value and delivery efficiency of a combined UCaaS/CCaaS solution sales. SMEs (non-agents) may add value in supporting customers with complex/niche interactions and therefore communications tools (with the same interfaces) provide greater value when paired.

- Deliver bundled adjacent services to SMBs by creating product bundles that include telephony, networking, access, security, mobility and customer service capabilities. Contact center R&D efforts should be focused on the creation of “good enough” contact center functionality.

CPaaS-Centric Contact Center Providers

CPaaS-centric contact center providers compete through positioning composable, API-enabled capabilities. CPaaS providers are uniquely positioned to offer customizable customer service solutions through the inherent nature of the CPaaS developer-centric building block approach. Most CCaaS/CPaaS providers support a mix of digital and voice channels but frequently lead with messaging and advanced messaging services. Amazon Web Services (AWS), with Amazon Connect, is the largest CPaaS-centric contact center provider and continues to grow share. Some CPaaS/CCaaS providers specialize in specific customer service capabilities (digital) but do not offer comprehensive contact center functional services.

The flexibility of CPaaS-centric contact center capabilities comes at a cost, whereby customers may need to devote significant resources in building and supporting the solution. This aligns well for some contact center operations, but most buyers prefer customer service solutions with prebuilt, off-the-shelf capabilities, because they lack the required internal developer resources. While the CPaaS segment represents a small segment of the contact center market today, the ability to build flexible, industry-aligned customer services may fuel demand for this segment.

Market Opportunities for CPaaS-Centric Contact Center Providers

- Lead with self-serve enablement and digital channel expertise by promoting success metrics associated with offloading interactions away from agents.

- Leverage the benefits of a composable approach by productizing industry-specific customer service bundles.

- Combine omnichannel and orchestration features of CPaaS with contact center capabilities to facilitate the creation of customer experiences across the customer life cycle.
- Reduce the need for customers to have significant internal developer resources by promoting availability of design, integration and implementation resources.

Competitive Profiles

The CCaaS providers featured in this research are representative vendors competing in the market via one of four segmentation approaches. Two providers from each of the four segmentation categories are profiled. Individual providers within the segments include a mix of disruptors, heritage providers and top performers. This is not intended to be a comprehensive list of all CCaaS market competitors.

8x8

Product or Portfolio Overview

8x8 competes in the market with its eXperience Communications Platform. 8x8 offers three primary CCaaS packages: voice only, digital and voice and an advanced option with quality management (QM) and interaction analytics. Contact center functions can be acquired stand-alone or in conjunction with 8x8's UCaaS capabilities. 8x8 has a sweet spot serving customers across small and midsize segments, but it can also serve large enterprise use cases where significant advanced functionality isn't required. 8x8 has a partnership in place with Genesys (Genesys Cloud CX) to enable contact center/telephony integration for their respective customer bases.

How 8x8 Competes

8x8 differentiates in the market through leveraging its cloud telephony user base and attaching customer service capabilities on the back of UCaaS. 8x8 CCaaS is frequently noted for its ease of use and intuitive dashboards and analytics. The solution does not feature as many richer capabilities (such as detailed reporting) required to support larger contact center environments. It does, however, satisfy most customer service requirements and informal contact centers with omnichannel routing at an affordable price.

8x8 further differentiates through a tight Microsoft Teams integration strategy. 8x8 Contact Center is certified for MS Teams and has deep integration with the Teams platform. The tight integration gives 8x8 the ability to access the extensive base of global Teams users.

Amazon Web Services (AWS)

Product or Portfolio Overview

AWS competes in the market with its Amazon Connect omnichannel CCaaS solution. Amazon Connect is an open API platform that supports third-party integrations through its AWS Marketplace. The solution continues to gain traction in large contact center environments where it's a foundation for configurable customer service operations. Within the small business segment, Amazon Connect is primarily used as an out-of-the-box tool with standard/basic capabilities (for example, standard omnichannel routing, agent desktop, reporting and analytics). Amazon Connect is primarily suited for customer service leaders looking for flexible, scalable services and consumption-based contact center pricing. Many Amazon Connect customers are large customers of AWS cloud, and can leverage their AWS knowledge to build differentiated customer service journeys.

How AWS Competes

AWS differentiates with its Amazon Connect solution being highly agile and having strong AI/ML capabilities, including Amazon Lex for conversational AI and chatbots and Contact Lens for speech analytics. Amazon Connect's open APIs enable integration with both existing business applications as well as new customer service tools. The agility enables flexibility and customization within contact center operations. The agility, however, also includes some drawbacks — for customized integrations, developers or partners with coding skills (specifically Lambda) may be required. Furthermore, Gartner Peer Insights reviews indicate the changing nature of the service (a result of rapid updates and innovation), can make finding functionality a challenge.

AWS also differentiates with its scale. Many large enterprises have AWS master service agreements in place that can favor adding Amazon Connect to existing Amazon investments. Furthermore, AWS's global infrastructure, its own extensive customer service team coverage and expansive developer network promote stable innovation and generally reliable support operations.

Cisco

Product or Portfolio Overview

Cisco competes in the CCaaS market with its Webex Contact Center offering. (Cisco also positions Webex Contact Center Enterprise, a multi-instance private cloud solution.) Webex Contact Center capabilities are maturing and are currently aligned with small to midsize contact center environments. The Webex Contact Center Enterprise solution is geared for large enterprise use cases requiring customizable and more comprehensive capabilities. Enabled in part by Cisco's 2021 acquisition of IMImobile, Cisco later added self-service and agent-assist channels including chat and email as well as SMS and social channels (including WhatsApp and Facebook Messenger).

Cisco has a large installed base of existing premises-based contact center customers, particularly in the healthcare, insurance, transportation and higher education verticals, to transition to its Webex cloud solution.

How Cisco Competes

Cisco differentiates through having a broad premises-based and cloud-based product portfolio. As the market transitions to the cloud, few providers continue to position a mix of premises-based, dedicated and cloud-based capabilities. In addition, Cisco has a global sales organization with a broad base of global channel partners. Note that Cisco's Webex Contact Center (multitenant) platform is different from the premises-based platform, meaning a migration to the cloud still requires an overhaul. However, certain cloud-based applications consumed by Cisco's premises platforms can be migrated to the Webex Contact Center solution, thus easing the overall migration.

Cisco also differentiates through its ability to extend a broad mix of enterprisewide communications tools, along with its customer service and support solutions. Cisco has deep expertise in adjacent enterprise telephony, conferencing, video systems, CPaaS and networking capabilities that can be deployed across the broader organization. Supporting these cross-functional integrations, Cisco's contact center leadership team is part of the Cisco Collaboration Group (includes the Webex Calling, Applications, Devices and Contact Center business segments).

Dialpad

Product or Portfolio Overview

Dialpad competes in the market with the Dialpad Ai Contact Center delivered on their Ai-Powered Customer Intelligence Platform. Dialpad's CCaaS capabilities are integrated in their UCaaS offering and positioned as part of their broader enterprise communications "TrueCaaS" portfolio — capabilities that also include telephony, messaging and meetings. Dialpad's customer service use cases to date have been voice centric, but integrations of their 2021 acquisitions — Kare Knowledgeware (enabling chatbot capabilities "Dialpad Self-Service") and Koopid (enabling self-serve and omnichannel support through the Koopid AI) — are projected to expand its use cases.

How Dialpad Competes

Dialpad differentiates through its use of AI for voice across its common UCaaS and CCaaS platform. Dialpad AI supports live transcription, automated note taking, proactive conversational guidance, real-time sentiment analysis, predictive customer satisfaction and pop-up agent assistance. While Dialpad offers voice AI use cases, Dialpad does not have significant expertise positioning broader AI-enabled contact center services to large enterprises with complex requirements.

Dialpad differentiates in the market through partnerships that offer opportunities for expansion. Dialpad receives investment and backing from Google, T-Mobile and SoftBank. Dialpad is aligned with Google Cloud as an independent software vendor offering both its UCaaS and CCaaS services on the Google Cloud Marketplace. In Japan, SoftBank is both an investor in the company and a partner for the resale of services in the difficult-to-penetrate Japanese market. In the U.S., T-Mobile has extended Dialpad services to internal employees and resells Dialpad business services to its customer base.

Five9

Product or Portfolio Overview

Five9 competes in the market with its Five9 Intelligent Cloud Contact Center. While the company has a strong ability to serve small to midsize contact centers, Five9 is increasingly experiencing traction in large customer service environments. In 2022, Five9 added new data centers in Amsterdam, the Netherlands and Frankfurt, Germany to align with the multinational business requirements of large contact centers as well as data residency requirements of customer support teams headquartered outside of the U.S. The company is experiencing a shift in its leadership with the return of Mike Burkland as CEO after a five-year health-related hiatus.

How Five9 Competes

Five9 differentiates through offering reliable core routing capabilities and accessible insights. The solution offers intuitive customer service interfaces and the administration tools support straightforward management updates. While customers utilizing omni-channel operations have traditionally found Five9 digital channel management to be complicated, the company has made significant enhancements over the past 12 months to close gaps. Five9's AI Insights is positioned to enable access to customer service trend data and the newly released Advanced Analytics capabilities enables self-service customizable reporting data.

Five9 further differentiates with its customer service and support organization. Most customers are aligned with dedicated account managers who assist with business requirement identification and project management.

Genesys

Product or Portfolio Overview

Genesys competes in the CCaaS market with its omnichannel Genesys Cloud CX solution. In October of 2022, the company announced a consolidation of its portfolio, noting it will end the sale of its Multicloud CX offer to focus innovation and go-to-market resources on Genesys Cloud CX. Genesys Cloud CX, despite its relative immaturity in the contact center portfolio, is deployed globally and has notable traction serving large, complex contact center environments. Genesys also has a global base of delivery partners to support market expansion.

How Genesys Competes

Genesys differentiates through its experience orchestration capabilities. Genesys Cloud CX features intuitive interaction flow design capabilities through its Architect feature. Architect uses a visual flow builder design approach, instead of code, promoting ease of use for administrators. Native workforce engagement management addons also differentiate the Genesys Cloud CX solution in the market, enabling administrators to easily optimize agent resources.

Genesys further differentiates through an innovative approach to its contact center capability developments, including its AppFoundry Marketplace. The company proactively consults with user groups to determine desired enhancements and rapidly extends feature updates on a rolling basis (every couple of weeks). While this approach is generally favorable, the rapid pace of updates can also mean customer support teams are sometimes ill equipped to resolve issues, partners may not be aware of capabilities, and documentation/training resources can become rapidly outdated.

NICE

Product or Portfolio Overview

NICE competes in the market with its CXone platform. NICE is a dedicated contact center specialist with roots in workforce engagement management (WEM) and core CCaaS platform coverage since its 2016 acquisition of inContact. The NICE suite supports voice and digital channels including its newly released FluenCX digital customer experience (CX) solution, its AI data-driven experience for customer journey orchestration. NICE compliments its capabilities with its Enlighten AI solutions for routing and customer care management.

How NICE Competes

NICE competes in the market through positioning a comprehensive customer experience suite of services. NICE differentiates with strong WEM capabilities including tools for improving contact center agent engagement, workforce management and quality and performance management capabilities. Furthermore, customers frequently cite intuitive user interfaces making the solution straightforward for agent training purposes. Some customers report occasional dropped calls and inconsistent experiences with customer support teams in issue resolution.

NICE also differentiates with its partner-centric approach. The NICE partner ecosystem includes a mix of UCaaS providers, systems integrators and service providers. In the UC-related realm, NICE supports integrations with GoTo, Microsoft Teams, RingCentral and Zoom. As part of these partnerships, the UCaaS providers position NICE CXone when contact center requirements extend beyond the offerings in their native portfolios. In the service provider area, NICE leverages partnerships with Bell Canada, Deutsche Telekom and Orange, among others, to promote international sales expansion. NICE also has partnerships with global systems integrators (including Accenture, Atos, IBM and KPMG) to extend its reach and implementation capabilities.

Twilio

Product or Portfolio Overview

Twilio competes in the market with Twilio Flex. While Twilio supports omnichannel contact center capabilities (voice, SMS, email, webchat, WhatsApp and video), many customers focus on Twilio's SMS notification and advanced messaging capabilities as part of its composable architecture. The Twilio AI strategy centers on a strong partnership with Google Contact Center Artificial Intelligence (CCAI). Twilio Flex is especially well suited for organizations looking to add SMS-centric communications to legacy channels and open to utilizing either internal developer resources capable of building customized solutions or modernizing with the assistance of one of Twilio's system integration partners.

How Twilio Competes

Twilio differentiates with its CPaaS leadership position. The company is a CPaaS pioneer, boosted by a large developer community and market recognition as an open API-centric provider. Twilio has traction with digital-native companies (Airbnb, Lyft, Shopify) looking for mobile-centric and self-serve-centric customer support. Many Flex customers are existing users of Twilio's communications APIs. Twilio is also expanding its Flex partner network, and now includes Deloitte, Perficient and Terazo. While Twilio's open API approach supports the extension of a broad range of functionality, Gartner Peer Insights feedback indicates Twilio Flex is less polished compared with many contact center solutions (lacks intuitive user interfaces).

References and Methodology

The research for this report was conducted using existing Gartner research, complemented by primary and secondary research surveys obtained in 2021 and 2022. A vendor fact review was conducted with providers featured in the Competitive Profiles section to validate the accuracy of the relevant material.

Document Revision History

Competitive Landscape: Contact Center as a Service - 4 December 2021

Recommended by the Authors

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

Forecast Analysis: Contact Center, Worldwide

4 Strategies for Contact Center as a Service Vendors to Capitalize on SMB Growth Opportunities

Market Opportunity Map: Unified Communications, Collaboration and Contact Center, Worldwide

Magic Quadrant for Contact Center as a Service

Quick Answer: How Will the End of Sale of Multicloud CX Impact My Genesys Engage Contact Center Platform Strategy?

Market Trend: Contact Center Vendors Should Double Down on Digital Channels as Enterprises Consolidate Vendors

Market Trend: Conversational AI for Agent Automation Delivers an Efficient Customer Contact Center Experience

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