Enterprise Connect 2022
Cage Match!
Highlights

Webex: Competitive Position and Differentiation

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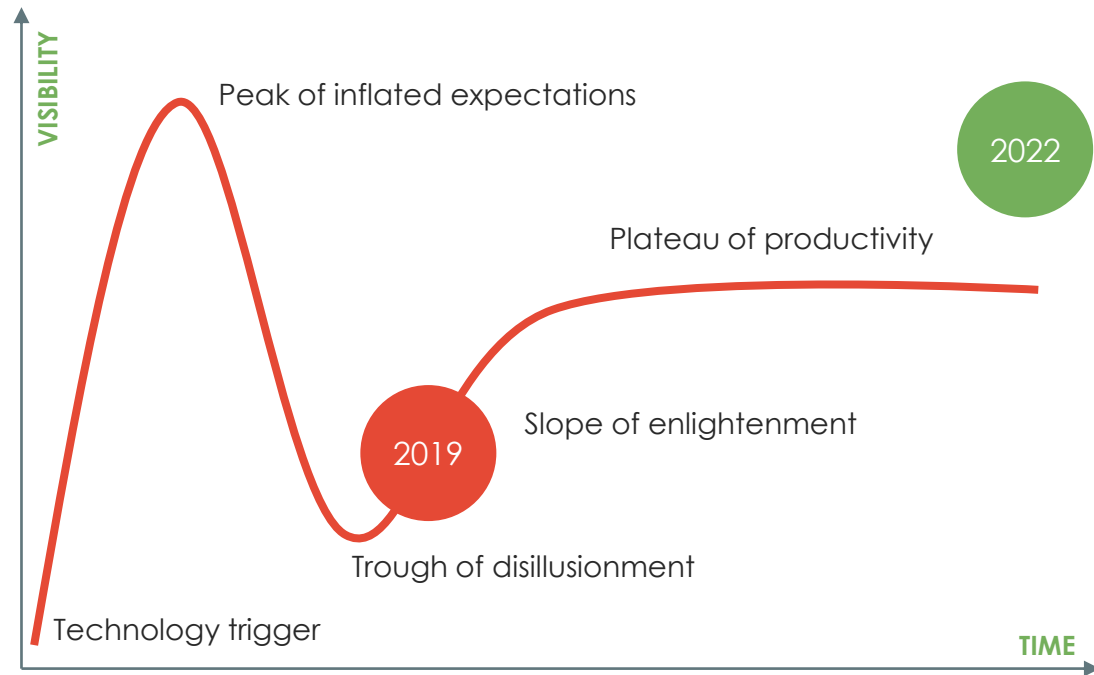
About This Ebook

Each year **Brent Kelly and Phil Edholm** deliver a highly attended UCaaS vendor assessment at the Enterprise Connect industry conference

This ebook presents **highlights of the 2022 assessment and Cisco's Webex key strengths** and differentiators

While sponsored by Cisco, the views in this ebook are **based on the author's independent and unbiased research**, in preparation for the assessment delivered at Enterprise Connect
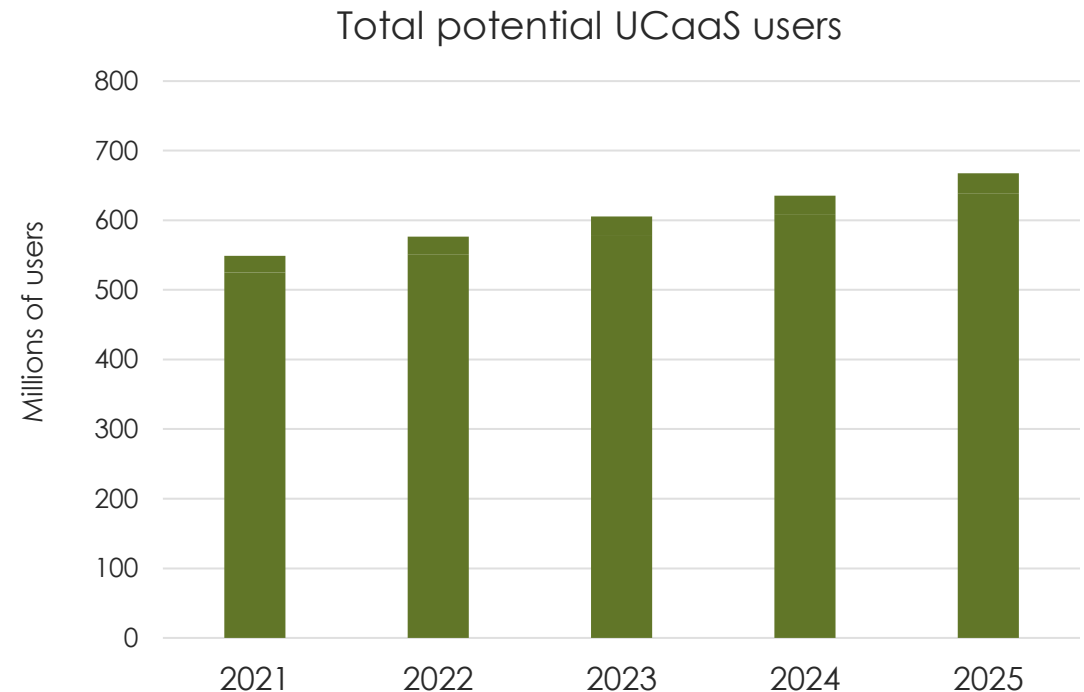
The UCaaS Market is Maturing

Market evolution

Hype cycle diagram with VISIBILITY axis (vertical) and TIME axis (horizontal), showing: Technology trigger, Peak of inflated expectations, Trough of disillusionment (2019), Slope of enlightenment, Plateau of productivity (2022).

Huge addressable base

Total potential UCaaS users

Bar chart titled "Total potential UCaaS users" with Y-axis "Millions of users" (0 to 800) and X-axis years 2021, 2022, 2023, 2024, 2025, showing increasing bars from approximately 550 to 665.

The Vendors We Evaluated

webex by CISCO

45M cloud seats

40M on-premise IP PBX seats

Microsoft

216M paying Teams subscribers/monthly active users

Number of active UCaaS/telephony users unknown

RingCentral®

5-6M UCaaS seats

Primarily telephony focused

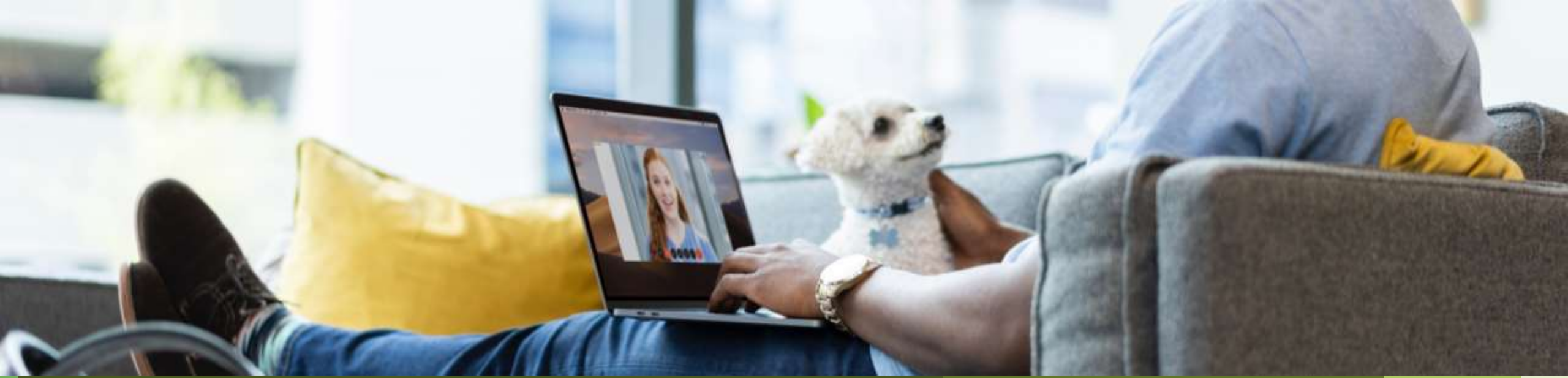Video offer recent

ZOOM

32M total seats

12M in use for our defined meetings

Primarily meetings focused

→ **These companies are positioned to be long term leaders in the UCaaS market**

Webex Strategy
and Differentiation

Webex is "the Apple" in this Market

Being the software and hardware integrator is different

Optimized experience

In-house application and devices

Improved functionality and ease of use

Advanced capabilities driven by deep integration

Integrated delivery

Lower overall costs and better outcomes

Better management and operations

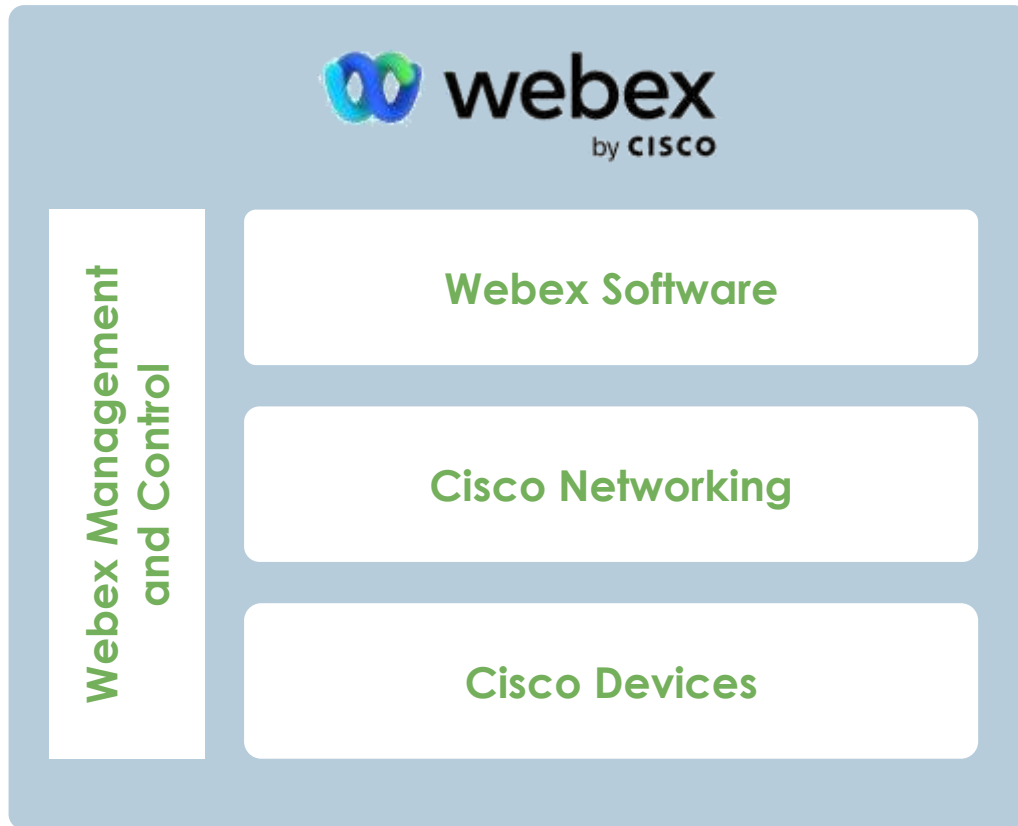Includes both edge devices and the network
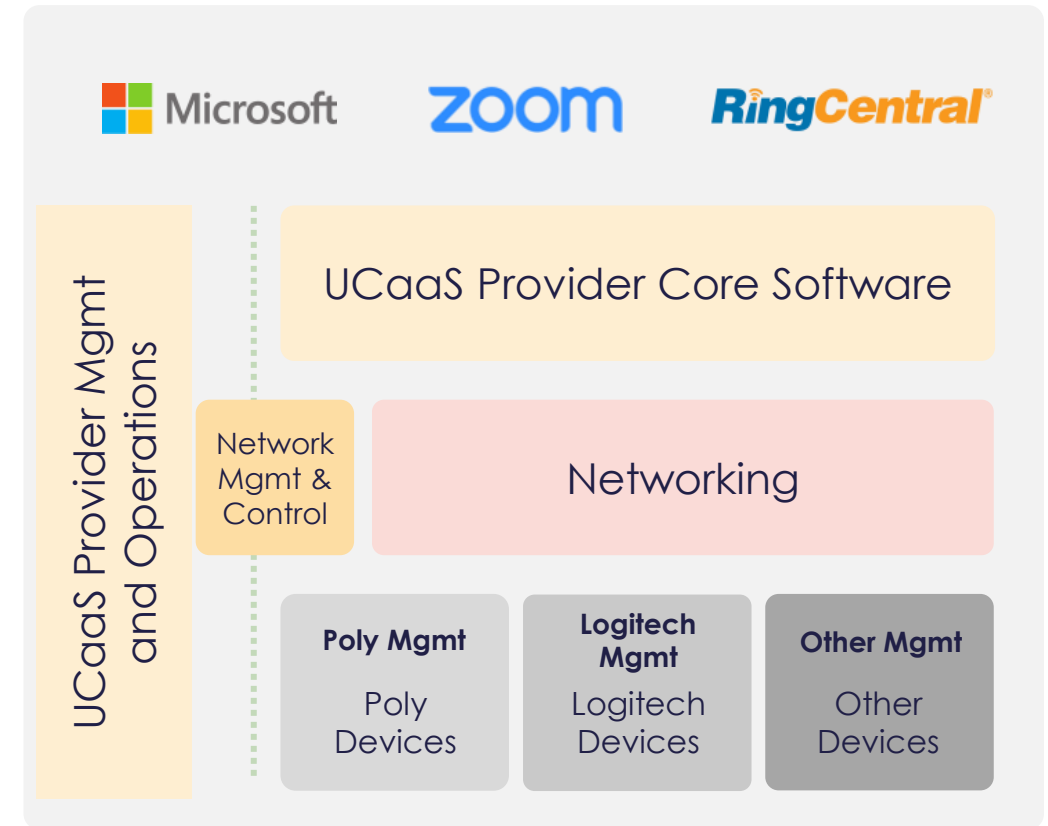
Strategy Similarities

The Webex Platform Advantage

Single integrated platform

Webex Management and Control

- **Webex Software**
- **Cisco Networking**
- **Cisco Devices**

Complexity is exponential

Microsoft | ZOOM | RingCentral

UCaaS Provider Mgmt and Operations

UCaaS Provider Core Software

Network Mgmt & Control | Networking

Poly Mgmt	Logitech Mgmt	Other Mgmt
Poly Devices	Logitech Devices	Other Devices

Webex Devices

| | Desk & hybrid devices | Room devices | Phones & frontline devices |

Desk & hybrid devices

Purpose-built collaboration for the home and office desk

- Webex Desk Hub
- Webex Desk Mini
- Webex Desk
- Webex Desk Pro

USB cameras
- Webex Desk Camera

Headsets
- 300 Series
- 500 Series
- 700 Series
- Bang & Olufsen Cisco 980

Room devices

Video bars and collaboration kits
- Webex Room Kit Series

Single and multi-screen integrated room systems
- Webex Board Series
- Webex Room Series
- Webex Room Panorama Series

Room controls and peripherals
- Webex Room Navigator
- Table and Ceiling Microphones
- PTZ Cameras

Phones & frontline devices

Wireless & DECT phones
- Wireless IP Phone 8821
- Webex Wireless Phone
- IP DECT 6800+ Base Station

Desk Phones
- 6800 Series
- 7800 Series
- 8800 Series

Conference phones
- Webex Room Phone

→ **Consistent experience across devices and meeting spaces**

→ **Leadership integrating video hardware with sensors and networks**

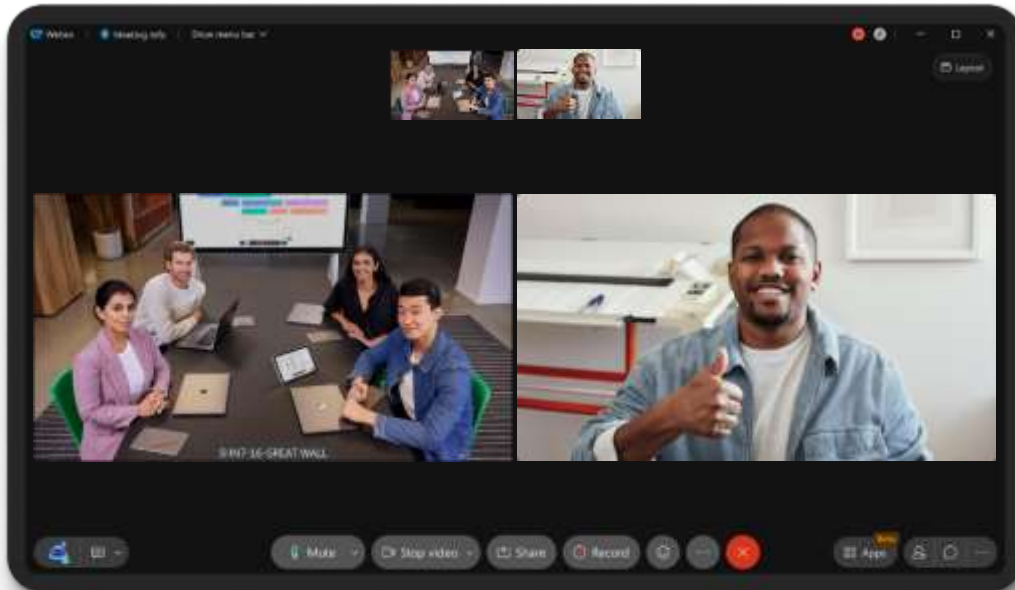→ **Advanced capabilities integrating room intelligence with core UCaaS functions**

Webex Device Interoperability

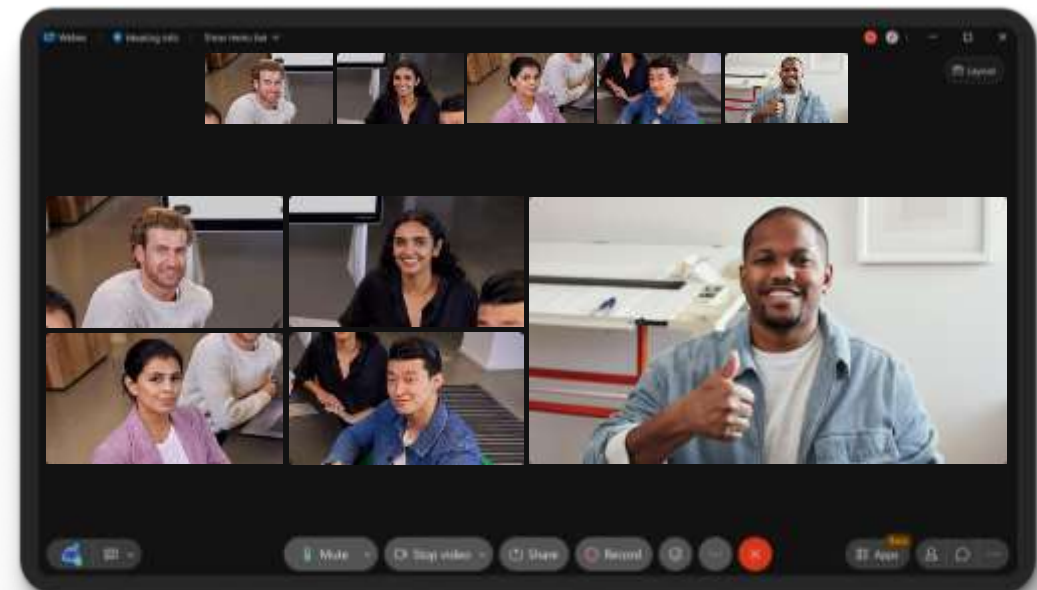→ **Webex endpoints can join meetings hosted in Microsoft Teams, Zoom Video, and Google Meet**
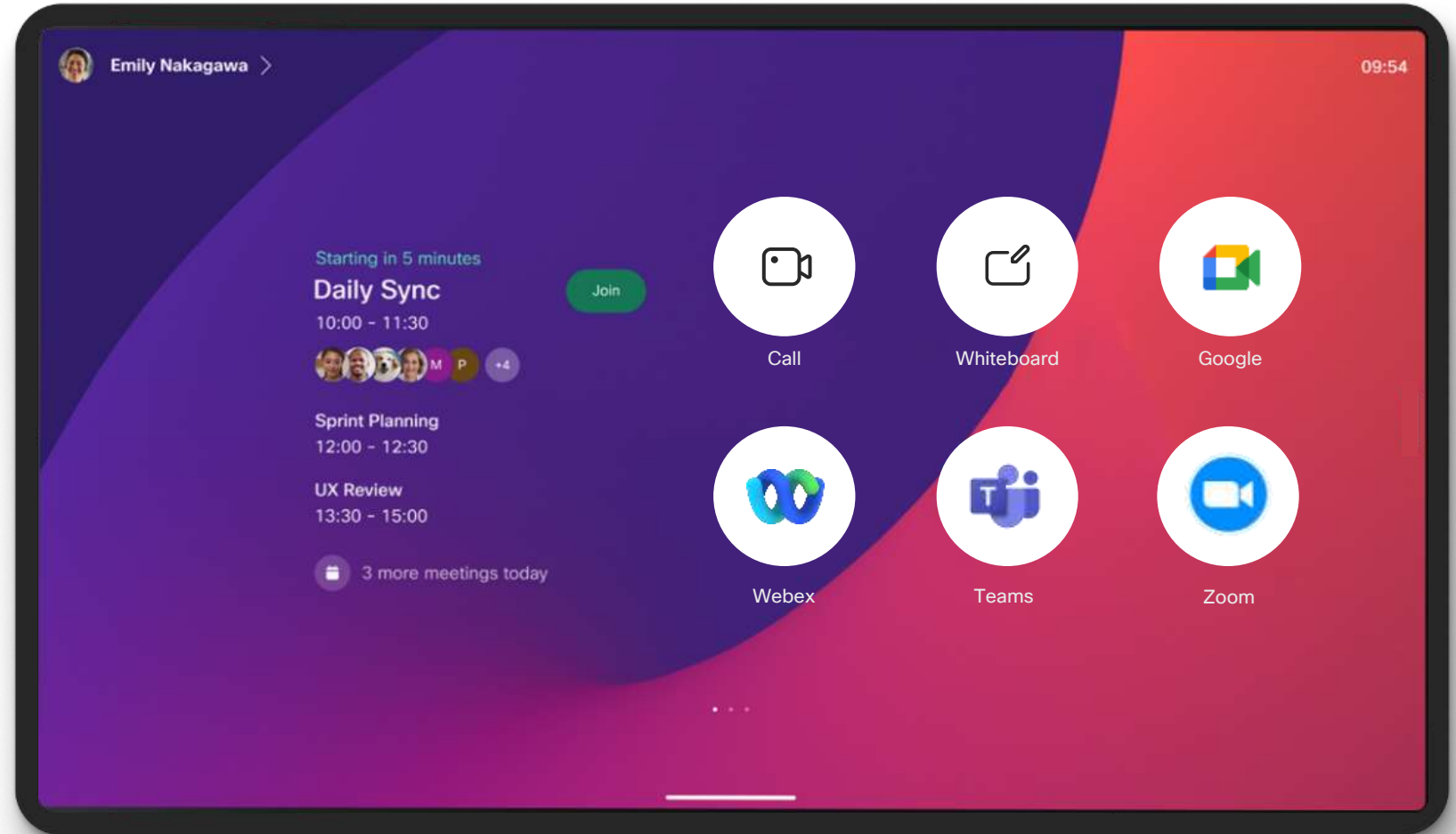
Webex Meetings: People Focus

Before

After: equalized participant view

→ **All Webex devices support people focus**

→ **Key for hybrid meetings equity and productivity**
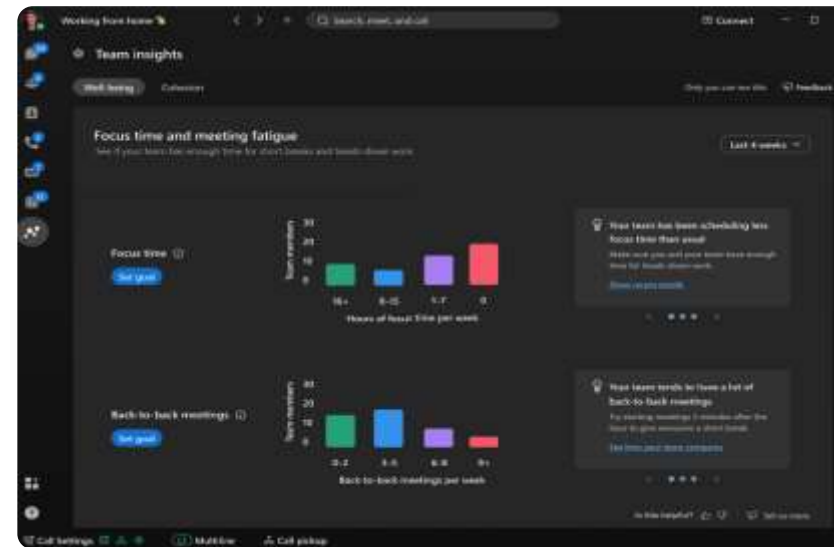
Webex Management

Control hub

One place for
management

People insights

Collaboration
analytics and
insights

→ **Strong Webex IT capabilities deliver complete integrated management**

Webex Collaboration AI

Webex Assistant

→ Highlights

→ Meeting transcript/ recording

→ Take an action item

→ Closed captioning

→ Take a note

→ Voice commands

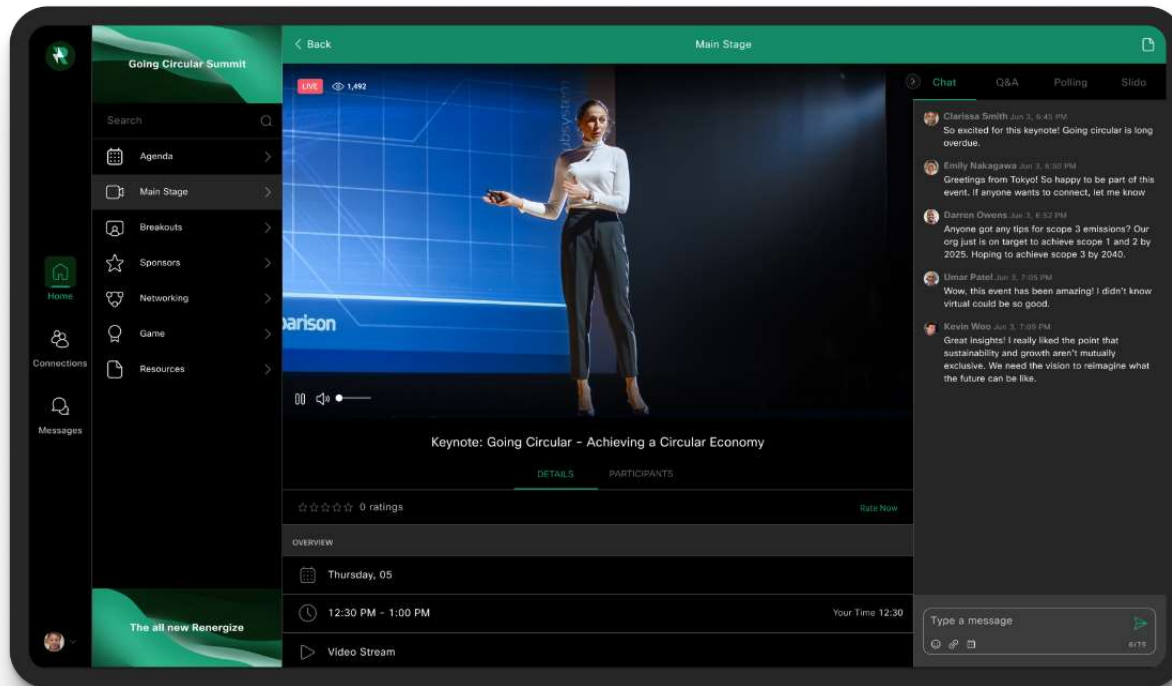**Voice recognition and intelligence**

Simultaneous translation

13 base languages to over 100 languages

→ **Extensive AI capabilities optimized for real-time collaboration**

Webex Events

In-Person, remote, or hybrid

Extensive analytics

Slido audience engagement

Included in Webex at no additional charge

→ **Current gold standard for complete large event functionality**

→ **Events are critical for employee and customer engagement in the new hybrid work world**

Audio Intelligence Across Webex Portfolio

Noise cancellation

Background noise removal

Optimize for my voice
Focuses on the speaker's voice only

Optimize for all voices
Equalizes group meeting voices

Reduces connection noise

AI based identification and removal

Focuses on the speaker's voice only

Equalizes group meeting voices

→ **Advanced audio capabilities available across both devices and application**
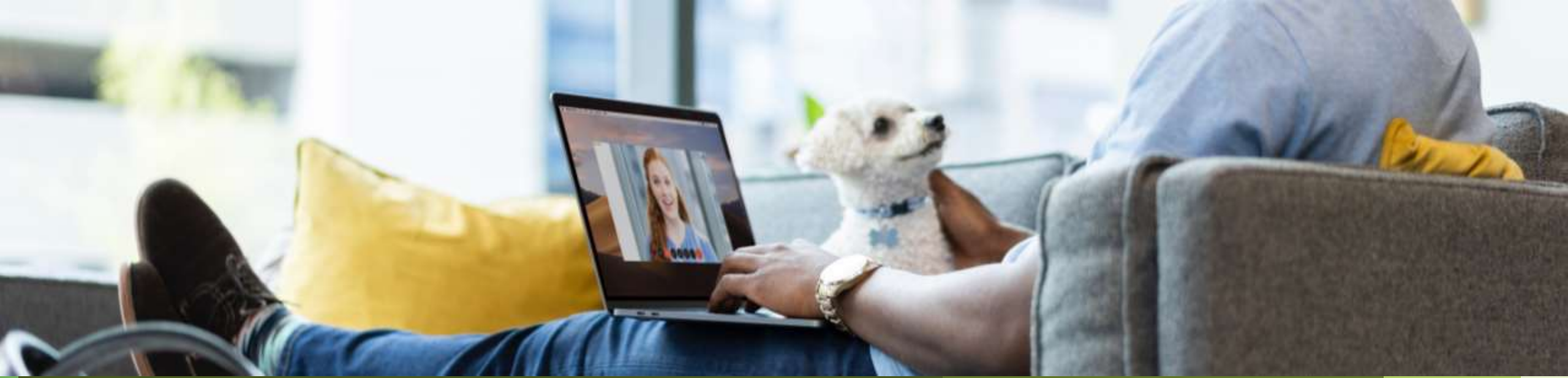
Product Comparisons

Meetings Functionality Comparison

	webex by CISCO	Microsoft	zoom	RingCentral
Video quality	🟩 Highest	🟩 Highest	🟩 Highest	⬜ Lowest
Audio quality	🟩 Highest	⬜ Lowest	⬜ Lowest	🟧 Middle
Join experience	🟩 Highest	🟧 Middle	⬜ Lowest	⬜ Lowest
Breakouts	🟩 Highest	🟩 Highest	🟩 Highest	🟩 Highest
Sharing	🟧 Middle	🟧 Middle	🟩 Highest	⬜ Lowest
Security	🟩 Highest	🟧 Middle	⬜ Lowest	⬜ Lowest

🟩 Highest rating 🟧 Middle rating ⬜ Lowest rating

→ **Webex leads or co-leads in most meeting evaluation criteria**

Telephony Offer Comparison

webex by CISCO

Great features

Most countries – 86

DID inbound

Integrated management

On-premises solutions

Microsoft

Good offer

Fewer countries

Premises solution

Partner options

ZOOM

Good offer

2nd most countries

Low-cost point

RingCentral

Most features

Regulated carrier, does not enable other PSTN services

Telephony management

→ **Cisco experience in premises to cloud migration is a significant advantage**

Events Comparison

	webex by CISCO	Microsoft	zoom	RingCentral
Internal corporate events	5000 participants 100K option	1000 participants	10,000 participants Added cost	10,000 participants 3rd party registration / analytics
Internal team events	5000 participants Included in suite	1,000 participants Included in suite Integrated with office	Added license cost	Basic service Cost TBD
External events	The gold standard for large/complex events	Limited capabilities	Recent major enhancements Event mobility White labeling Consumer familiarity	No event capabilities

🟩 Highest Rating   🟧 Middle Rating   ⬜ Lowest Rating

➡ **Webex leads in all events evaluation criteria**

Noise Removal Comparison

	webex by CISCO	Microsoft	ZOOM	RingCentral
Noise removal – no voice – default/auto settings	Highest	Lowest	Middle	Lowest
Noise removal – no voice – advanced/high settings	Highest	Lowest	Middle	Lowest
Noise suppression – with voice – default/auto settings	Highest	Lowest	Lowest	Highest
Noise suppression – with voice – advanced/high settings	Highest	Lowest	Middle	Middle

■ Highest rating   ■ Middle rating   ■ Lowest rating

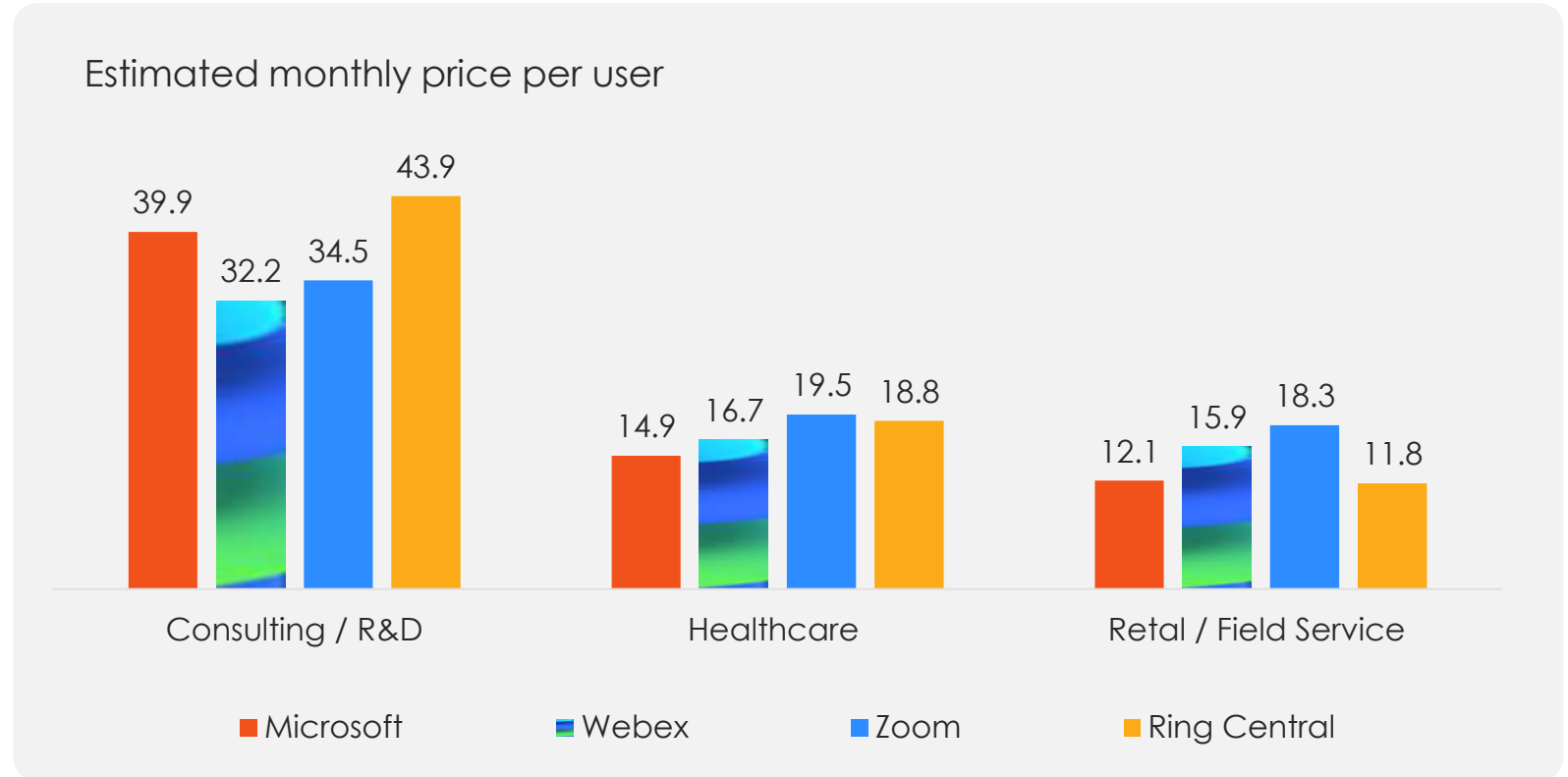➔ **Demonstrated Webex leadership in AI for Noise removal and reduction**
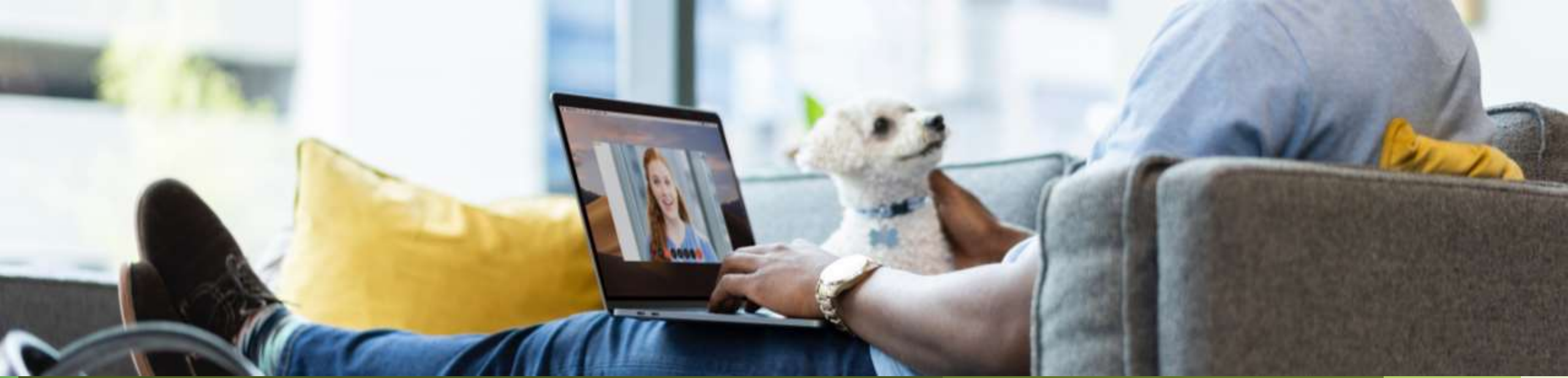
Pricing Comparisons

Typical Use-Case Pricing

Overall variation is less than $150 per year per employee – benefits dramatically outweigh differences

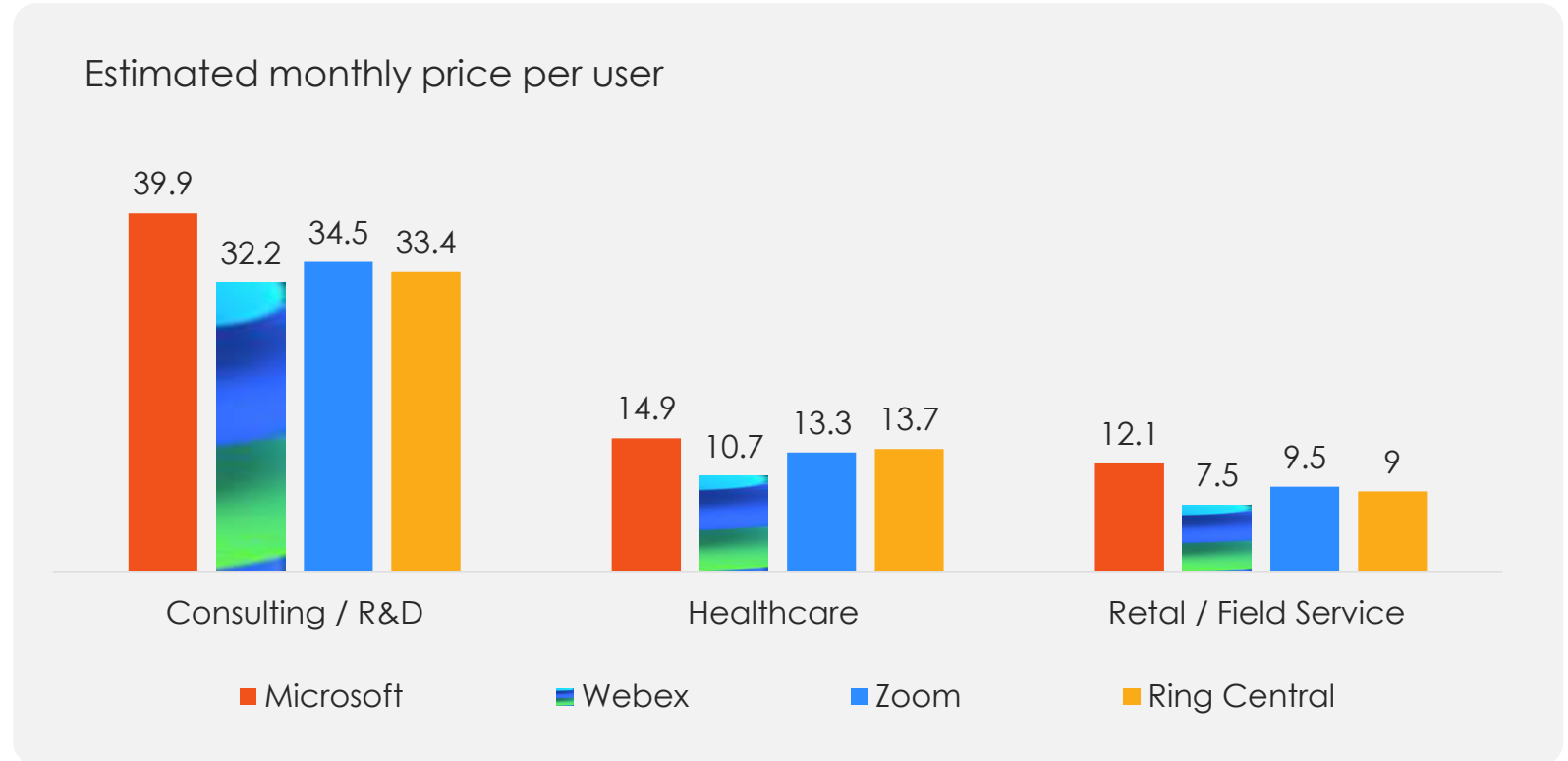RingCentral includes PSTN, Cisco and Zoom skewed by disproportionate frontline cost

Estimated monthly price per user

	Consulting / R&D	Healthcare	Retal / Field Service
Microsoft	39.9	14.9	12.1
Webex	32.2	16.7	15.9
Zoom	34.5	19.5	18.3
Ring Central	43.9	18.8	11.8

■ Microsoft   ■ Webex   ■ Zoom   ■ Ring Central

→ **Highly competitive Webex pricing**

Adjusted Use-Case Pricing

Pricing including adjustments for competitive in-market deals

Assumes a reduced RingCentral cost without included PSTN access

Assumes a lower cost Frontline offer from Cisco and Zoom

Estimated monthly price per user

	Consulting / R&D	Healthcare	Retal / Field Service
Microsoft	39.9	14.9	12.1
Webex	32.2	10.7	7.5
Zoom	34.5	13.3	9.5
Ring Central	33.4	13.7	9

- ■ Microsoft
- ■ Webex
- ■ Zoom
- ■ Ring Central

→ **Webex price leadership after component adjustment**

Webex Device Cloud Promotion

More accessible, more affordable

+ **Headsets**

	Webex Desk Camera	Webex Desk Hub* + Camera	Webex Desk*	Webex Desk Pro	Room Kit Mini	Room Kit
Cloud	$159	$878	$1,499	$2,999	$1,799	$3,599
Premises	$219	$1,714	$2,995	$5,495	$3,795	$6,995

Prices shown are Cisco suggested resell price | Cloud – customers with company wide Cloud Meeting subscriptions (Webex Suite EA or Meetings AU, EA)

→ **Webex cloud device pricing is highly competitive compared to all eco-system vendors**

Our Overall Assessment

⊕ **Webex is the overall leader when both meetings and telephony capabilities are considered**
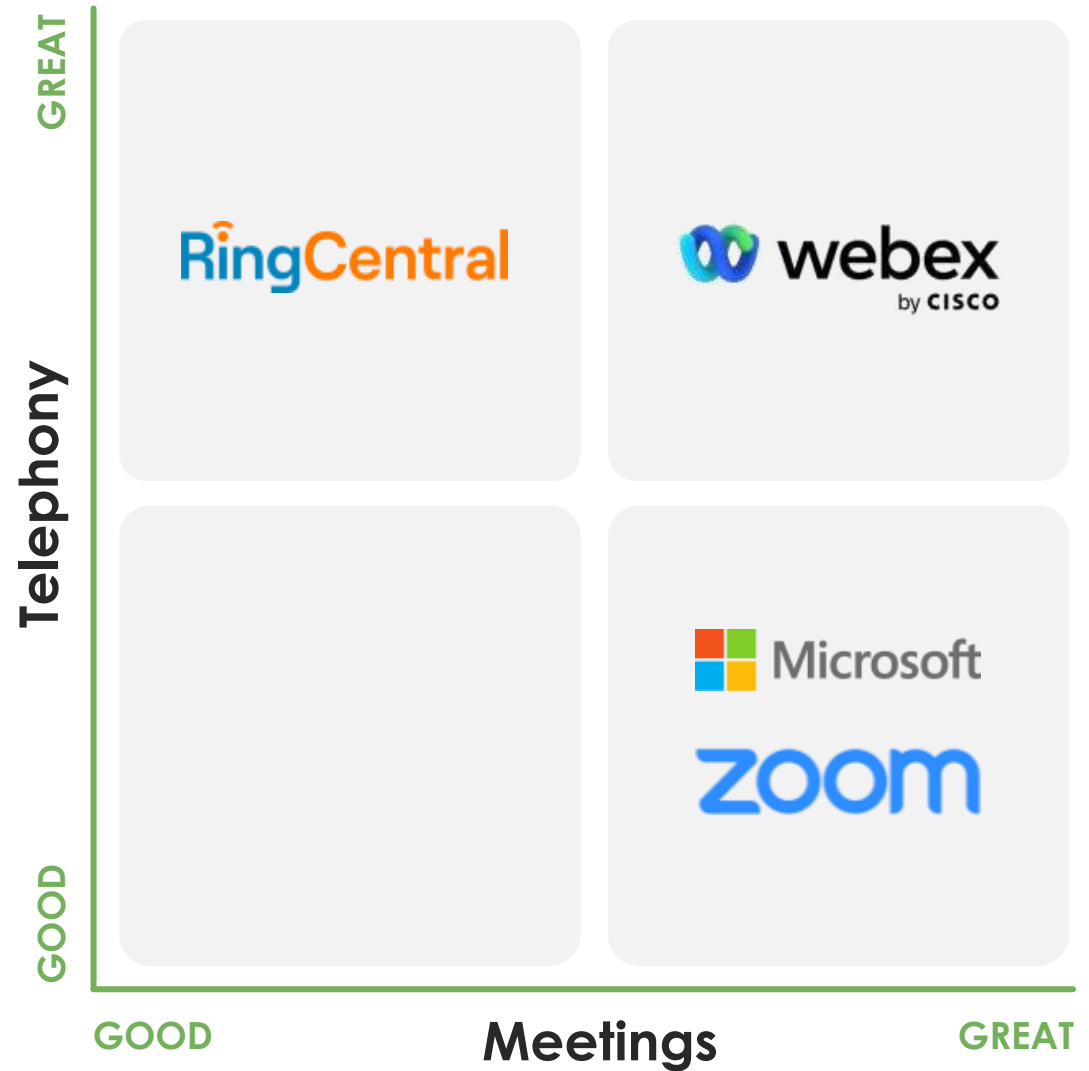
About Us

Phil Edholm

President & Principal | PKE Consulting LLC

Phil Edholm is a recognized UC industry leader and visionary. In 2007, he was recognized by Frost and Sullivan with a Lifetime Achievement Award for Growth, innovation and leadership in telecommunications for an essential role in creating the VoIP industry. He was a leader in the market adoption of webRTC, the technology underlying much of today's UCaaS industry. Phil has 18 granted US patents and holds a BSME/EE from Kettering University.

Since 2012, Phil has been an Analyst/Consultant in the communications and collaboration industry. He regularly consults to large end users and UCaaS vendors to assist in their planning and analysis of the market. As part of the PKE Consulting analysis practice, Phil has been focused on the major vendors, providing a highly anticipated yearly assessment at the Enterprise Connect Industry conference. Based on extensive research, this analysis has been delivered in partnership with Brent Kelly since 2013.

Thank You