

IDC MarketScape: Worldwide Enterprise Videoconferencing Systems 2025 Vendor Assessment

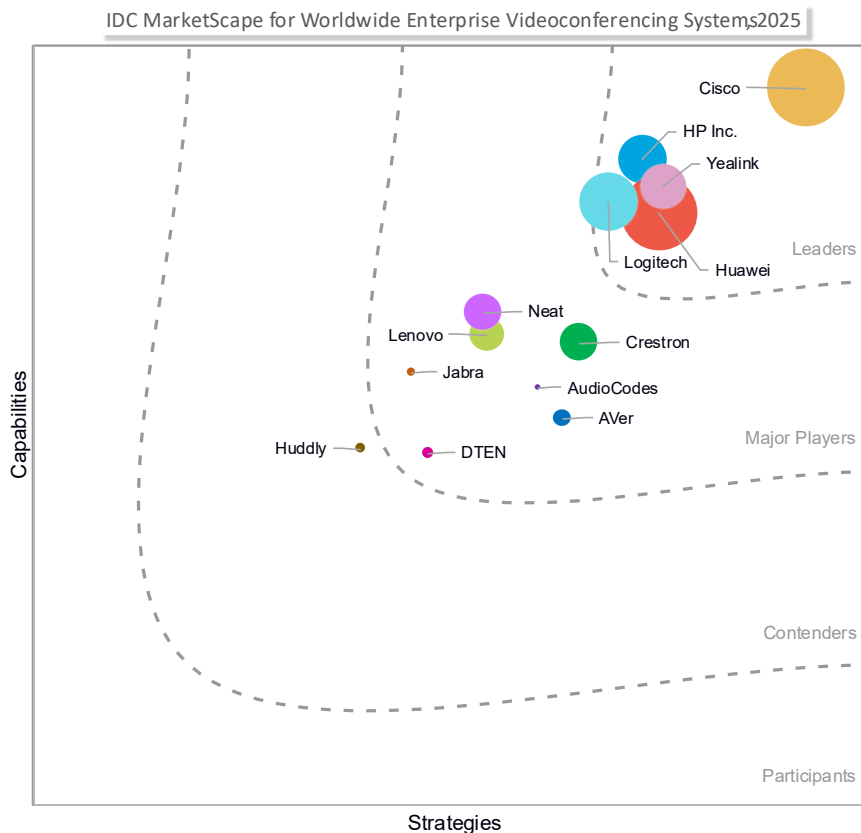
Jitesh Gera

THIS EXCERPT FEATURES CISCO AS A LEADER

IDC MARKETSCOPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Enterprise Videoconferencing Systems Vendor Assessment



Source: IDC, 2025

Please see the Appendix for detailed methodology, market definition, and scoring criteria.

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Enterprise Videoconferencing Systems 2025 Vendor Assessment (Doc # US52995625).

IDC OPINION

Enterprise videoconferencing systems form a critical part of the worldwide unified communications and collaboration (UC&C) market. This segment refers to videoconferencing hardware that completes the AI-powered hybrid meeting and collaboration experiences enabled by UC&C platforms. It includes videoconferencing room endpoints, huddle room endpoints, and videoconferencing infrastructure, including multipoint control units (MCUs). These devices are undergoing a wave of AI-driven innovation, enabling not only better audio/visual (AV) experiences but also the integration of generative AI and agentic AI experiences.

In 2024, enterprise videoconferencing systems accounted for approximately 5% (\$3.3 billion) of the platforms-led worldwide UC&C market, which was estimated to be valued at \$69.2 billion at the end of 2024. The worldwide market for these devices grew at a CAGR of 3.2% in 2020–2024 and is expected to grow at a CAGR of 2.4% in 2025–2029. Future growth is expected to be driven by AI-powered productivity-focused initiatives that help businesses differentiate from competition, but it is also likely to be hindered by slowing economic conditions and preferences for budget allocation toward other IT priorities.

Over the past few years, hybrid working norms and a rapidly rising interest in AI-powered business communications have started to push organizations to redesign their workplaces and video-enable their office spaces for effective collaboration outcomes. In IDC's August 2024 *Cloud Communications and Datacenter Services Survey*, 27% of the businesses surveyed reported that they consider it "extremely important" for their organizations to redesign or upgrade their office facilities, while another 35% said they consider it "important" to do so. And AI enablement of their meeting spaces is one of their top priorities. 25% of the businesses worldwide reported that meeting room AI capabilities such as adaptive framing, virtual meeting zones, and multiple camera layouts were among their top 3 purchase decision drivers for selecting their primary UC&C platform. Moreover, for 34% of the businesses that are still in the market for a UC&C solution, these meeting room AI capabilities are top of the mind. With these AI capabilities and other advanced collaboration features, businesses intend to

enhance hybrid meeting experiences, improve employee productivity, improve collaboration, and deliver better customer experiences.

In 2022–2024, 80% of the organizations made changes to their meeting room real estate (source: IDC's *Cloud Communications and Datacenter Services Survey*, August 2024). Over a third reported increasing the number of small, medium-sized, and huddle rooms, while 27% said they increased the number of large meeting rooms in their offices. Even though a smaller share of businesses reported increases in their large meeting spaces, investments in upgrading the meeting room technology were primarily directed at large meeting spaces such as boardrooms. There is a significant cost associated with meeting room technologies, potentially running into approximately \$10,000 per room, and understandably, businesses want to deploy the latest features in their most impactful spaces first. However, vendors are now reporting signs of pace picking up across business verticals and company sizes.

Business communications is among the top IT priorities for businesses worldwide, and AI-driven enhanced productivity and experiences are key to creating differentiated outcomes. On the platform side, most UC&C vendors are offering basic AI-powered capabilities for no additional cost to drive higher adoption among users and increase dependency on AI-based tools. As users get accustomed to using platform-based AI tools in their daily work lives, they will expect the same tools to be available across their physical workplaces. Upgrading meeting room technology, along with UC&C platforms, is therefore increasingly important for businesses to create a holistic AI-enabled business communications environment.

This IDC MarketScape on enterprise videoconferencing systems evaluates 13 global vendors that qualified our criteria for inclusion. They vary in terms of their capabilities and target markets, but each vendor is capable of providing devices that enable videoconferencing in physical meeting spaces. IDC has assessed these vendors on the basis of multiple parameters of performance across two axes — capabilities and strategies. These parameters are defined in the appendix section of the document. IDC also provides brief profiles of each vendor assessed, covering their key offerings and capabilities, in addition to their strengths, weaknesses, and suitability for a buyer organization.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

IDC studied 13 vendors for this edition of the IDC MarketScape for enterprise videoconferencing systems. These are AudioCodes, AVer, Cisco, Crestron, DTEN, HP Inc., Huawei, Huddly, Jabra, Lenovo, Logitech, Neat, and Yealink. Out of these, DTEN, Huddly, Jabra, Lenovo, and Yealink did not actively participate and contribute toward the research and information-gathering process, thus IDC had to rely on publicly

available information to evaluate them. The others participated actively and provided the required information to IDC for a clearer evaluation.

The 13 vendors evaluated in this study were selected on the basis of the following criteria:

- The vendor must manufacture and sell integrated videoconferencing devices, including at least all-in-one video bars or other forms of meeting room camera systems. The product offerings may also include pan-tilt-zoom (PTZ) cameras, tabletop cameras, integrated digital collaboration and whiteboarding devices, personal computer (PC)-based collaboration endpoints, computational devices for device-agnostic videoconferencing, and multipoint control units.
- The vendor's annual revenue from videoconferencing devices must be at least \$50 million in the last fiscal year, or the vendor must show signs of being a potential disruptor in the market.
- The company must have a publicly visible go-to-market focus on selling open and interoperable videoconferencing solutions aimed at meeting rooms and other industrial/corporate spaces.
- The vendor must operate in at least one major geographical region, necessarily including the United States and optionally covering other countries in the Americas; Europe, the Middle East, and Africa (EMEA); and Asia/Pacific (APAC) (including Japan).

ADVICE FOR TECHNOLOGY BUYERS

IDC advises organizations that are considering investing in enterprise videoconferencing systems to leverage the data in Figure 1 — along with the associated vendor profiles, buyer guidance, and related research — to develop a suitable list of potential suppliers. In addition, IDC recommends leveraging additional technology buyer research and tools provided by IDC to evaluate the various vendors in the market on specific capabilities and suitability for your organization. These include the 2025 IDC ProductScape document on enterprise videoconferencing systems (compares the 13 vendors assessed in this IDC MarketScape on key product functionalities) and IDC TechMatch, a generative AI-based platform that answers natural language questions on these vendors' capabilities and strategies and helps narrow down the list of potential suppliers.

The enterprise videoconferencing systems market is made up of a wide range of market players, with each having its own unique strengths and weaknesses. Some are clear market leaders with multifaceted capabilities and the ability to cater to multiple

kinds of users and industry-specific needs, while others are more niche and focused on certain vertical or collaboration use cases.

The videoconferencing space has recently undergone a shapeshift to incorporate new and evolving hybrid collaboration expectations. Most of the vendors are now focused on delivering AI capabilities that enhance meeting equity for remote as well as in-room participants, improve speaker or presenter tracking, capture clear and relevant audio and video within predefined boundaries, and enable generative AI capabilities, among others. Moreover, a significant part of videoconferencing innovation is focused on producing integrated all-in-one collaboration devices that feature cameras, microphones, computing power and, in the case of collaboration boards, a display as well for whiteboarding or screen sharing.

Integrated videoconferencing devices typically work in bring-your-own-device (BYOD) settings where a user can simply plug in their personal computer to the videoconferencing device through a USB cable and join meetings on any UC&C platform. However, most vendors also provide these integrated all-in-one devices in a "certified for" mode wherein the device can be set up to join meetings on a specific preferred platform such as Zoom, Microsoft Teams, or Webex, without the need for a USB cable or a personal computer. Buyer preferences vary significantly by geography — for instance, North America shows a higher preference for purchasing devices in a "certified for" mode, while APAC shows a slightly higher preference for BYOD.

Furthermore, there are several other devices apart from integrated bars and collaboration boards that suit specific use cases, such as PTZ cameras (or their alternatives) for speaker/presenter tracking, 360-degree tabletop cameras for closely capturing all in-room participants, PC-based desk collaboration solutions for individual meeting use cases, and compute units, which can flexibly connect to a range of cameras and microphones for a customized videoconferencing setup.

However, buyers are strongly advised to not exclusively focus on device features to make their selection for a videoconferencing vendor. Device features are easily replicable, but long-term value will depend on multiple other factors, including device longevity (software support and end-of-life management), administration portal capabilities, geographic presence for support, additional services portfolio, partner network, and the vendor's vision for sustainability, security, innovation, and AI.

Therefore, before embarking on creating a list of potential suppliers, organizations must conduct a thorough needs assessment to:

- Identify the videoconferencing use cases that are important to your users (e.g., BYOD uses, alignment with chosen UC&C platform, and feature requirements)

such as speaker tracking, meeting equity, and virtual boundaries to use open or glass-walled rooms effectively).

- Establish your goals with respect to employee and customer experiences your organization wants to deliver.
- Determine your organization's future needs as a growing company.
- Define your sustainability requirements from your videoconferencing supplier.
- Identify IT administrative requirements and professional services needed for your organization to deploy and integrate new equipment effectively.

The outcome of the needs assessment will be a clear set of goals and requirements, which will guide the next steps and priorities for the request for information (RFI) and request for proposal (RFP) stages. IDC recommends that buyers focus heavily on the following aspects to ensure better user experiences and long-term value from their investments in videoconferencing equipment:

- IT overload weighs down organizations; ensure your provider either delivers a comprehensive management platform capable of delivering a single-pane-of-glass view across locations, rooms, and devices, or allows its devices to integrate well with your existing or preferred management platform to, again, ensure a centralized view.
- Meeting equity and enhanced audio/visual capabilities matter; however, ensure that your users actually find value in those capabilities, and you're not just paying to get some features that your users won't leverage to drive better collaboration and customer experiences.
- Innovation drives differentiation; ensure your provider has a clear and time-specific road map for future development as against having a catch-up approach that is just consistently reactive and aimed at staying competitive.
- The channel plays a much more significant role in the videoconferencing devices market as compared with the UC&C platforms space; ensure the provider you choose is serviced well through an expansive network of partners, including value-added resellers (VARs), managed service providers (SPs), audio/visual integrators or consultants, and independent software vendors (ISVs), depending on your geographic and servicing needs.
- The vendor you choose must also have a strong alignment with the UC&C platform of your choice to ensure a consistent supply of devices certified for use with your chosen UC&C platform. Parallely, the vendor's devices must also ensure high interoperability with other platforms and BYOD use cases to ensure flexibility in switching UC&C platforms later, if needed.

- The portfolio of adjacent products and services provided by a vendor and its partners also matters significantly, given that it can help ensure consistency and uniformity in device administration in addition to potential cost benefits.
- Sustainability in the supply chain matters; ensure your provider is on a path to continuously improve recyclability, energy efficiency, and other sustainability parameters through active planning and execution rather than on-paper, carbon offsets-based net-zero ambitions.

VENDOR SUMMARY PROFILE

This section briefly explains IDC's key observations resulting in a vendor's position in the IDC MarketScape. While every vendor is evaluated against each of the criteria outlined in the Appendix, the description here provides a summary of each vendor's strengths and challenges.

Cisco

Cisco is positioned in the Leaders category in this 2025 IDC MarketScape for enterprise videoconferencing systems.

Cisco is a publicly listed United States-based organization that provides a wide range of communication, collaboration, security, networking, and computing services and equipment. Its videoconferencing portfolio includes a full range of devices such as all-in-one video bars, PTZ cameras, tabletop cameras, integrated collaboration boards, and compute devices for video meetings and camera tracking. It also offers several other communication and collaboration products and services, including Webex (its cloud-based UC&C platform), IP phones, headsets, standalone microphones, meeting schedulers/controllers, personal webcams, and embedded sensors for wider visibility into and monitoring of the meeting room environments.

Cisco has the most complete set of communication and collaboration offerings of any player on the grid, covering the software side of things with its Webex platform, the hardware side of things with its wide range of AV equipment, and the networking, security, and visibility side of things through ThousandEyes (network intelligence platform), Control Hub (device and platform administration portal), and other related products and services. The company operates globally through a wide network of channel partners that include value-added resellers, managed service providers, systems integrators (SIs), AV consultants, distributors, and independent software vendors.

Cisco's videoconferencing devices are optimized for Webex, but it also offers devices certified for MTR. Starting 4Q25, Cisco will also offer devices certified for Zoom, and it

also enables enhanced interoperability with Google Meet. All its Desk, Board, and Room series systems are also BYOD enabled to join any other meeting platform through USB connections.

MTR is one of the key growth platforms for Cisco's videoconferencing business, with the company reporting strengthening momentum within the U.S. government deployments and some other verticals. Its AI capabilities have also advanced rapidly with innovative features such as spatial meetings through Apple Vision Pro, name tagging of individual meeting participants in a room for precise meeting transcriptions and summaries, wireless content sharing through Apple AirPlay, and the usual AI-generated meeting zones, framing, tracking, and noise cancellation features. The name tagging feature for user-specific transcriptions and summaries is currently being integrated with Webex summaries and awaiting some development at Microsoft's end to enable it on Android-based MTR devices.

The Control Hub is an industry-standard AI-powered admin portal for platform, device, and workspace management functionalities. It offers deeper visibility into meeting rooms through a remote access feature for viewing and fixing any visible issues, in addition to AI-based preemptive issue identification, automated alerts and resolutions, and overall device and system health monitoring functionalities. Cisco also sets the standards in security, providing solutions certified for use within government agencies, armed forces, financial services, and other critical verticals.

The company's videoconferencing business is primarily led through the channel, but it also offers professional services for select enterprise customers directly. These services offered by Cisco and its partners include room design consultation, deployment, training, adoption, managed services, and technical support services. It also offers an online Workspace Designer tool for self-serve initial room design planning in addition to other online self-serve guides and training webinars.

The company aims to continue strengthening its AI capabilities through its partnership with NVIDIA and an integrated, holistic approach to UC&C platform, devices, management, and networking aspects. Cisco will also continue to enhance its interoperability proposition through BYOD devices and closer collaboration with UC&C platform vendors, including Microsoft, Google, and Zoom.

Strengths

- End-to-end products and solutions provider across geographies, verticals, and the entire spectrum of communications and collaboration, including networking, security, and visibility
- Well-defined strategies and road map for long-term future development through internal shifts as well as external partnerships/acquisitions

- Interoperability with other platforms alongside optimization for Webex
- Professional services capabilities delivered directly as well as through its wide-ranging network of channel partners

Challenges

- Delivers good value proposition when deployed with the entire plethora of platform, devices, networking, and visibility services. This might be perceived by small and medium-sized businesses that are simply looking to equip their meeting spaces with video devices as a daunting proposition to consider.
- Offers a relatively complicated set of products and solutions to navigate through for buyers compared with vendors focused only on videoconferencing devices.

Consider Cisco When

Consider Cisco if:

- Your organization needs comprehensive solutions catering to not just video enablement of meeting spaces but also complex and advanced monitoring, management, networking, and security needs
- Your company's workspace redesign initiatives call for global standardization, longer duration of support for updates, complex professional services, and a high level of security focus

APPENDIX

Reading an IDC MarketScape Graph

For the purposes of this analysis, IDC divided potential key measures for success into two primary categories: capabilities and strategies.

Positioning on the y-axis reflects the vendor's current capabilities and menu of services and how well aligned the vendor is to customer needs. The capabilities category focuses on the capabilities of the company and product today, here and now. Under this category, IDC analysts will look at how well a vendor is building/delivering capabilities that enable it to execute its chosen strategy in the market.

Positioning on the x-axis, or strategies axis, indicates how well the vendor's future strategy aligns with what customers will require in three to five years. The strategies category focuses on high-level decisions and underlying assumptions about offerings, customer segments, and business and go-to-market plans for the next three to five years.

The size of the individual vendor markers in the IDC MarketScape represents the estimated market share of each individual vendor within the specific market segment being assessed. It is not exactly to scale for readability purposes and uses data (to the extent available) from the Worldwide Quarterly Unified Communication and Collaboration Tracker, as of the Q1 2025 release published in June 2025.

IDC MarketScape Methodology

IDC MarketScape criteria selection, weightings, and vendor scores represent well-researched IDC judgment about the market and specific vendors. IDC analysts tailor the range of standard characteristics by which vendors are measured through structured discussions, surveys, and interviews with market leaders, participants, and end users. Market weightings are based on user interviews, buyer surveys, and the input of IDC experts in each market. IDC analysts base individual vendor scores, and ultimately vendor positions on the IDC MarketScape, on detailed surveys and interviews with the vendors, publicly available information, and end-user experiences in an effort to provide an accurate and consistent assessment of each vendor's characteristics, behavior, and capability.

Market Definition

IDC defines enterprise videoconferencing systems as the hardware-based solutions for meeting and conferencing requirements in physical spaces. In IDC's definition of enterprise videoconferencing systems, audio/visual equipment such as integrated camera and microphone systems for all sizes of meeting rooms and bridging infrastructure such as multipoint control units (MCUs) are included.

However, it excludes standalone cameras and microphones, digital whiteboards with integrated display and camera, and other peripherals that go into setting up meeting rooms, such as meeting schedulers, meeting controllers, displays and screens, connecting cables, and headsets.

IDC looks at the enterprise videoconferencing systems market as a subset of the worldwide unified communication and collaboration market. IDC's definition of UC&C is made up of two broad aspects: software-based platforms and devices, including IP phones and all-in-one video systems. UC&C platforms can be defined as integrated communications solutions that primarily facilitate calling, messaging, and meeting capabilities for both employee and customer communication use cases. These include on-premises, cloud-based, and hybrid telephony and meeting solutions. Last, UC&C devices include desktop IP phones, videoconferencing room endpoints, and huddle room endpoints catering to all room sizes.

Related Research

- *Worldwide Unified Communications and Collaboration Forecast, 2025–2029* (IDC #US52147225, June 2025)
- *Worldwide Unified Communications and Collaboration Market Shares, 2024: Microsoft Continues to Grow Steadily While Dominating the UC&C Market* (IDC #US53216025, June 2025)
- *IDC Market Glance: Unified Communications and Collaboration, 1Q25* (IDC #US50898324, March 2025)
- *IDC's Worldwide Unified Communications and Collaboration Taxonomy, 2025* (IDC #US53177725, February 2025)
- *Top 5 Trends in UC&C for 2025: Predictions for the Worldwide UC&C Market in 2025 and Beyond* (IDC #US53121125, January 2025)
- *IDC TechScape: Worldwide Unified Communications and Collaboration Technologies, 2024* (IDC #US52750324, December 2024)
- *How Are Office Spaces Evolving to Accommodate Hybrid Working Preferences?* (IDC #US52721124, November 2024)

Synopsis

This IDC study for 2025 enterprise videoconferencing systems evaluates 13 vendors, comparing them on their strategies and capabilities around key parameters of performance. It provides insights into the strengths and challenges of each of the 13 vendors included — AudioCodes, AVer, Cisco, Crestron, DTEN, HP Inc., Huawei, Huddly, Jabra, Lenovo, Logitech, Neat, and Yealink.

"AI-powered communication and collaboration tools not only enhance productivity and user experiences but also help businesses differentiate effectively from competition," says Jitesh Gera, research manager, IDC's Unified Communications and Collaboration research program. "Truly hybrid collaboration requires equal focus on UC&C platform and devices to ensure an integrated and uniform experience across virtual and in-office settings. Buyers of UC&C solutions are advised to study the key decision factors outlined in this IDC MarketScape to acquire solutions that can meet their current as well as future needs."

ABOUT IDC

International Data Corporation (IDC) is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. With more than 1,300 analysts worldwide, IDC offers global, regional, and local expertise on technology, IT benchmarking and sourcing, and industry opportunities and trends in over 110 countries. IDC's analysis and insight helps IT professionals, business executives, and the investment community to make fact-based technology decisions and to achieve their key business objectives. Founded in 1964, IDC is a wholly owned subsidiary of International Data Group (IDG, Inc.).

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