

IDC MarketScape: Worldwide Collaboration Tools for Education 2022 Vendor Assessment

Matthew Leger

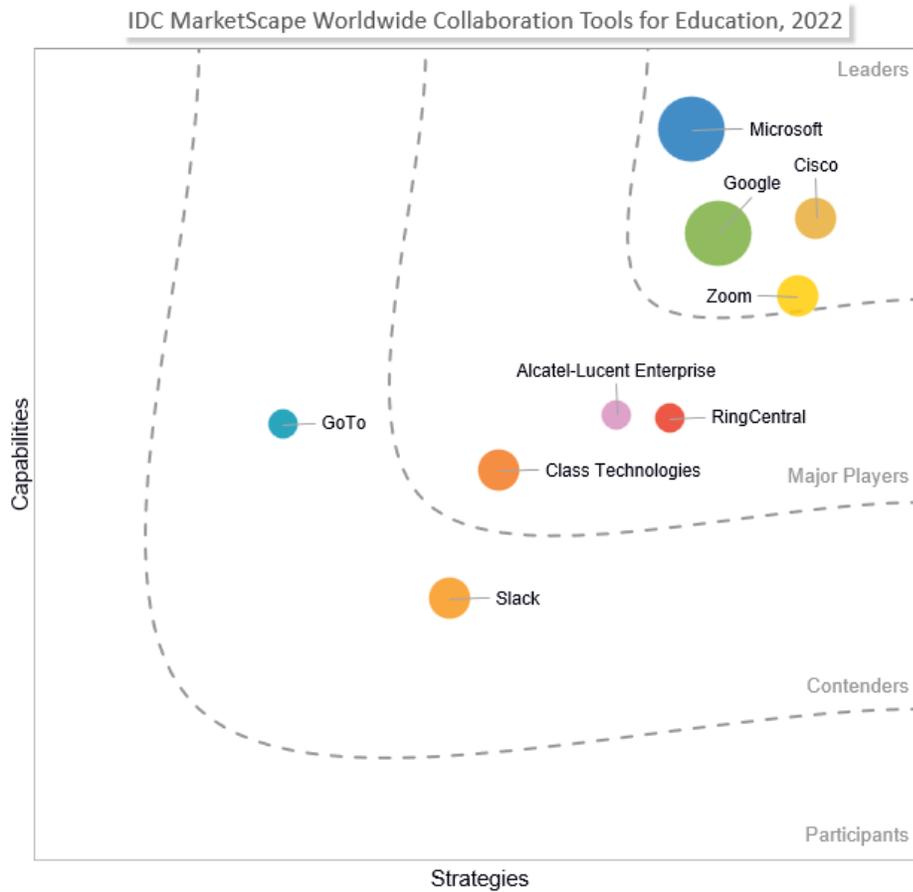
Wayne Kurtzman

THIS IDC MARKETSCAPE EXCERPT FEATURES CISCO

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape Worldwide Collaboration Tools for Education Vendor Assessment



Source: IDC, 2022

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

IN THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: Worldwide Collaboration Tools for Education 2022 Vendor Assessment (Doc # US48621122). All or parts of the following sections are included in this excerpt: IDC Opinion, IDC MarketScape Vendor Inclusion Criteria, Essential Guidance, Vendor Summary Profile, Appendix and Learn More. Also included is Figure 1.

IDC OPINION

Since early 2020, collaboration solutions have played an instrumental role in education around the world as schools moved classes online and as they have continued to navigate ongoing and unpredictable disruptions to normal operations. As a result of the COVID-19 pandemic and the changes that have occurred in education over the past few years, the collaborative applications market has grown tremendously. As schools navigate the future of remote/blended/hybrid learning as well as hybrid and remote administration/operations, this market will only continue to expand. The players focused on building education-specific capabilities and addressing the industry's most pressing challenges are poised to win in this market.

The education sector has emerged as a core focus area for many collaboration platform vendors, and the market for collaboration tools for education has become hypercompetitive, with lots of players, big and small, jockeying for market share. There is also wide variation in strengths and weaknesses among the platforms, making it difficult for education IT leaders to make informed and prudent decisions for the future. This has created a lot of noise for education buyers as they seek to evaluate solutions in the market. This document is written to help IT leaders in education make informed investments in collaboration solutions, considering their current and long-term needs.

This study applies the IDC MarketScape methodology to evaluate global videoconferencing and collaboration platform vendors. This is a qualitative and quantitative assessment of the vendor solutions. The vendors included in this study are Alcatel-Lucent Enterprise, Cisco, Class Technologies, Google, GoTo, Microsoft, RingCentral, Slack, and Zoom.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

A critical point in this research effort is to meet the following inclusion criteria:

- Vendors must have collaboration application customers in the education sector (K-12 and/or higher education) in at least two major geographic regions (North America [NA], LATAM, EMEA, and Asia/Pacific [APAC]).
- The vendor must have a collaboration product that has sold into market for the education sector for at least two years as of January 1, 2022.
- The vendor solution must include a full suite of collaboration functions including messaging/chat, an asset-centric or a document-centric collaborative solution, dynamic collaborative communication functionality (S2S, T2S, T2T, breakout rooms, etc.), dynamic content sharing functionality, and a videoconferencing component.
- The vendor solution must offer embedded pedagogical/classroom features and functionality specific to education use cases (e.g., virtual classrooms, classroom management, virtual whiteboarding, and education app integrations [e.g., Kahoot!]).

- The vendor solution must be able to integrate with at least two different SIS and/or two different LMS solutions .
- The vendor must not require that customers purchase telephony as part of their solution offering .

Vendors/solutions to watch are Verizon (BlueJeans) and BigBlueButton.

ADVICE FOR TECHNOLOGY BUYERS

Market Considerations

- **There are no one-size-fits-all collaboration solutions that will serve all your institutions' needs or requirements, and each solution is built from a different area of strength.** Each vendor offers a solution that has a clear set of strengths and weaknesses, and no solution offers a full suite of advanced collaboration capabilities that will satisfy all your requirements or desires. To meet all your collaboration needs, you will need to leverage multiple collaborative solutions together. Most vendors in this space understand this well and ensure their solutions can integrate and work seamlessly with competitor solutions, allowing customers to successfully leverage multiple tools that best fit their needs. At the same time, many of these vendors are doubling down on their areas of strength while working to make improvements in their areas of weakness by working with education customers to understand where they can improve. When evaluating vendors, determine which collaboration solutions work best with each other (specific to your circumstances) to support both back-office administrative and classroom-based use while keeping a close eye on which vendors are making the greatest strides in improving overall collaboration capabilities.
- **This is a hypergrowth market with lots of competitive solutions and a dizzying pace of change.** The vendors in this space will continue to invest heavily in their solutions for the foreseeable future. Expect to see more rapid product updates and innovations in the coming years. Pay very close attention to the product road maps the vendors are communicating to ensure their projected product updates continue to align with your evolving needs.
- **Pay close attention to what is truly "free," and be aware of potential hidden costs and feature sets that come with free offerings.** While the word "free" can be enticing, schools may be missing out on more advanced capabilities and security features if they chose to forgo the paid options.
- **It is important to pressure test vendor knowledge and expertise in education sector.** Many of these vendors are working to develop solutions across multiple industries, with many making strong investments in private sector solutions to support hybrid work models. The education industry has unique requirements that in many ways do not align with the needs of any other industry. Even within education, there are several significant differentiating factors between K-12 and higher education that can make it difficult to serve both with just one product. This makes it quite challenging for collaboration vendors to develop solutions that fit the needs of the education industry. While the vendors in the space work very hard to understand the needs of the sector, it is important to pressure test how well they understand what is going on in your unique institution and how that impacts their product development and customer support models before you chose to work with them.

Product Considerations

- **Prioritize solutions that support pedagogical best practices and best enable experience parity for students across locations and learning modalities.** A significant reason why remote and blended learning was so challenging for educators throughout the pandemic was that the

collaboration platforms on the market were not built with the needs of educators or students in mind. In response to this, several vendors in this space are working diligently to understand teacher and student workflows and develop solutions to support virtual and hybrid classroom environments. When choosing a vendor for the long term, consider those that best understand pedagogical procedures and are enhancing capabilities with classroom and student needs in mind. Keep a close eye on solutions that are developing with an ear toward enabling experience parity across teaching and learning modalities to ensure equal access and experiences for students, no matter where they are.

- **Leverage educational and training resources provided by vendors.** Many of the vendors in this space are working diligently to develop training and support resources to help institutions like yours make the most use of their platforms. It is important that you leverage educational and training resources developed by, or in partnership with, collaboration vendors. To ensure success moving forward, particularly with remote, blended, or hybrid learning models, be sure to use these resources for staff skills and professional development. For the long term, be sure to factor in the need for continuous/ongoing training and support for faculty, staff, and students as new product features and capabilities are released.
- **Leverage tools and capabilities offered by vendor solutions that help create an inclusive and supportive environment for students.** Consider key barriers to student engagement and success (e.g., comfortability with asking questions in front of peers) and invest in tools that break down those barriers and help enhance virtual learning and student experiences.
- **Consider your compliance and procurement process requirements.** Most education institutions around the world are bound by specific legal requirements that may influence their preference for a certain deployment method (e.g., on premises versus cloud) or a certain way of procuring the solution (e.g., support capex or opex procurement models). Make sure that the vendor is flexible regarding your organization's procurement requirements.

VENDOR SUMMARY PROFILES

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 the 2022 IDC MarketScape for worldwide collaboration tools for education.

Founded by Stanford University employees 37 years ago, Cisco's founding was rooted in education and the company has been serving both K-12 and higher education customers since day 1. Webex is currently used by education institutions in 35 countries in every major geographic region and is available in 24 languages. Cisco is dedicated to further global and regional expansion for its education business.

Each geography Cisco operates in maintains a local presence including local education experts and Education Centers of Excellence (COEs). Cisco Education COEs engage with local independent software vendors (ISVs), provide training to regional customers, serve as a conduit to collect and prioritize feedback to product teams, host local events, and participate in relevant market activities. In some instances, these COEs and other physical education centers are colocated on university campuses – as is the case with Cisco's Innovation Central program in Australia, which operates a partnership between Cisco and Curtin University in Perth, Western Australia, and Cisco and Flinders

University in Adelaide, Australia. Cisco is now supporting the construction of a new hybrid teaching and learning technology center at Curtin, which will serve as a training center for the APJC region, and plans to develop similar facilities in other markets.

In the past two years, Webex has invested heavily in R&D to enhance the platform's features and capabilities, adding more than 1,000 new features during this time. A key acquisition made specific to education was that of Involvio, a student engagement software that helps education customers manage hybrid teaching and learning environments. Cisco also acquired Slido, an audience engagement platform that helps deliver "active learning" experiences on Webex, and Socio (now Webex Events), which provides tools to manage complex, large-scale hybrid events.

Over the next 24-36 months, Cisco is focused on bolstering Webex to support K-12 and higher education. Focus areas include new education product packaging to simplify purchasing and procurement of Cisco solutions, expanding LMS integrations and partnerships, integration with identity management providers, simplifying Webex's collaboration suite including meetings and chat, and increasing education and edtech investments and M&As. Quick facts about Cisco:

- **Education collaboration product:** Webex by Cisco
- **Company HQ location:** San Jose, California, United States
- **Education partners:** Systems integrators, business/strategy consulting firms, hardware/infrastructure providers, software firms, and data providers (over 3,800 partners supporting both K-12 and higher education business)
- **Edtech partnerships:** Blackboard, CirQlive, Clixie Media, Degree Analytics, Desire2Learn (D2L), Instructure (Canvas), Internet2, and Panopto
- **Pricing models:** Software as a service, licensed per seat based on "knowledge worker count," no charge for students (Knowledge workers include professors, administrators, and other users who are performing "knowledge-based tasks" and do not include employees such as groundskeepers or janitorial staff. Cisco also offers tools and solutions to help organizations afford purchasing technology upgrades or new technologies. Cisco Capital is designed to provide education institutions with flexible financing solutions for purchasing technology with no up-front costs and predictable payments. Country Digital Acceleration is a Cisco program built to expand access with country-level academic and industry partnerships and strategic investments. Currently, Cisco Country Digital Acceleration is involved with 37 countries around the world.)
- **Customer service and support offerings:** 24 x 7 technical support, self-service tools/resources, on-demand training, scheduled training, onsite/in-person support, online/remote support, and user groups/communities
- **Device agnostic:**
 - **Devices:** Mobile/smartphone, desktop/laptop, and tablet
 - **Operating systems:** Android, ChromeOS, macOS, iOS, Windows, Linux and VDI, and Webex RoomOS (devices such as Webex Board, Webex RoomKit Series, and Webex Desk Series)
- **Deployment model:** Managed hosting
- **Product updates:** Monthly
- **SIS integrations:** Webex does not have any out-of-the-box SIS integrations. However, education customers can leverage Webex's open APIs to integrate with an existing SIS. In some cases, education customers leverage Webex's Education Connector to integrate Webex with their SIS.

- **LMS integrations:** Blackboard, Desire2Learn (Brightspace), Instructure (Canvas), Moodle, Sakai, Schoology, and any LMS that supports LTI 1.1 (Webex is currently focused on enabling integrations with a greater number of LMS solutions on the market to meet any new standards published by IMS Global [including IMS Advantage]. Today, Webex is building integration capabilities to support LTI 1.3 and will be available to education customers soon.)
- **Pedagogical/classroom features:** Student engagement tracking, visual/interactive whiteboarding, teacher dashboards, automated grading, moderation controls, breakout rooms, real-time polling, and pop-up quizzes (Webex currently has plans to further enhance all these pedagogical/classroom in the next 12-24 months.)
- **Accessibility features:** Live/real-time transcription, closed captioning, adjustable accessibility settings, focus mode, keyboard shortcuts, multispotlight (live interpreter), customizable views (pins, spotlights, and tile dragging), and noise control (Webex currently has plans to further enhance these capabilities in the coming years. Webex is built using Universal Design frameworks and is disability/accessibility compliant.)
- **Security features:** In-meeting security controls, single sign-on, multifactor authentication, and end-to-end encryption (Webex is data privacy compliant in all major geographic regions, and the platforms offer adjustable/customizable security settings so education end users can tailor settings to their unique circumstances.)

Strengths

- **Education industry expertise/partnership.** Cisco has a long, storied history serving education institutions, and the company has made significant investments in its education business, including hiring industry thought leaders and practitioners to build its education vertical team. More than just a vendor serving the education market, Cisco has also been a significant provider of education for 30 years through Cisco Networking Academy. Its experience as an educator has helped inform Cisco's product development and investment strategy as it builds education-specific capabilities. Cisco also has deep industry partnerships with education leaders through its regional COEs, as well as its Higher Education Advisory Committee, K-12 Advisory Committee, the Cisco Global Education Leaders' Forum, and the Center for Interactive Learning and Collaboration (CILC).
- **Depth and breadth of innovative features/capabilities.** Cisco has built and acquired a suite of innovative solutions and capabilities that provide tremendous value to education institutions. Most notably, the platform's virtual whiteboarding capabilities through its partnerships with Mural and Miro offer educators a range of ways to create engaging and collaborative learning experiences for students. In addition, the platform enables educators to project 3D images onto physical spaces using their mobile phones during virtual meetings. This feature can be used by educators to provide engaging and interactive virtual demonstrations during class. Last, Webex is built with advanced AI capabilities that can help educators in virtual teaching environments. For example, Webex Assistant uses AI to transcribe and summarize virtual meetings.
- **Robust security features.** Webex offers robust security features built with education institutions in mind. The company understands the sensitive nature of education and its unique data security and privacy requirements/concerns and has built security into all its products at the core. During interviews for this study, several education customers rated Cisco "well-above expectations" or "best in class" for its security features.

Challenges

- **Speed to market with new capabilities.** Several of Cisco's education customers noted that Webex is often slow to market with new advanced product capabilities. However, several

customers noted when Webex does release new product features and updates, it tends to offer robust feature sets. While customers were often happy with Webex's product updates after launch, they noted a desire for the company to bring new features and capabilities to the market faster.

- **Adapting Cisco's broader investments to education specific use cases.** Cisco has made significant investments in its product portfolio over the past few years to support the broader global shift toward remote and hybrid work, unified communications, and other macro trends. As a result, Cisco offers a broad range of tools and capabilities for a range of uses across sectors and a complex product offering. The challenge for Cisco's product teams will be simplifying the product and adapting/tailoring these investments to support education-specific use cases.
- **Enhanced classroom/pedagogical features.** During interviews, Cisco's education customers were generally happy with the platform's classroom features, particularly its integrations with a range of LMS solutions and its suite of learner engagement tools such as Mural and Slido. However, customers felt that there was room to improve in several areas, including classroom management features and more granular student communication controls (especially in K-12). Several customers noted that there are a lot of great and more sophisticated features that they can use but understanding how to use them or where to find helpful resources can be challenging.

Consider Cisco When

Institutions should consider Cisco when they are looking for a vendor partner with deep industry expertise that offers a secure collaboration platform with a robust set of innovative features and capabilities.

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 market share of each individual vendor within the specific market segment being assessed.

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 collaboration tools as applications that enable groups of people to work together in virtual environments by sharing information, communications, and processes. These include conferencing applications, as well as team collaboration applications. These tools and applications enable videoconferencing, breakout rooms, screen and file sharing, and API-based, third-party application and solution integrations.

LEARN MORE

Related Research

- *IDC Perspective: Introducing IDC's Hybrid-First Framework for Education* (IDC #US48642322, February 2022)
- *IDC PlanScope: Cloud-Based Student Information Systems* (IDC #US48642522, February 2022)
- *IDC FutureScape: Worldwide Education 2022 Predictions* (IDC #US47242621, October 2021)
- *IDC MarketScape: Worldwide Collaboration and Community Applications 2021 Vendor Assessment* (IDC #US46743820, September 2021)
- *A Framework for Digital Resiliency in Education* (IDC #US47787221, August 2021)
- *IDC Worldwide Digital Transformation Use Case Taxonomy, 2021: Higher Education* (IDC #US47906921, July 2021)

Synopsis

This IDC study applies the IDC MarketScape methodology to evaluate global videoconferencing and collaboration platform vendors. This is a qualitative and quantitative assessment of the vendor solutions. The vendors included in this study are Alcatel-Lucent Enterprise, Cisco, Class Technologies, Google, GoTo, Microsoft, RingCentral, Slack, and Zoom.

Since early 2020, videoconferencing and collaboration solutions have played an instrumental role in education around the world as schools moved classes online and as they have continued to navigate ongoing and unpredictable disruptions to normal operations. As a result of the pandemic and the changes that have occurred in education over the past few years, the collaborative applications market has grown tremendously. As schools navigate the future of remote/blended/hybrid learning as well as hybrid and remote administration/operations, this market will only continue to expand.

"The market for collaboration tools for education has become hypercompetitive, with lots of players, big and small, jockeying for market share," said Matthew Leger, research manager for IDC's Worldwide Education Digital Transformation Strategies Program. "There is a lot of noise in the market, making it difficult for education IT leaders to make informed decisions for the future. This document is written to help IT leaders in education make informed investments in collaboration solutions, considering their current and long-term needs."

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