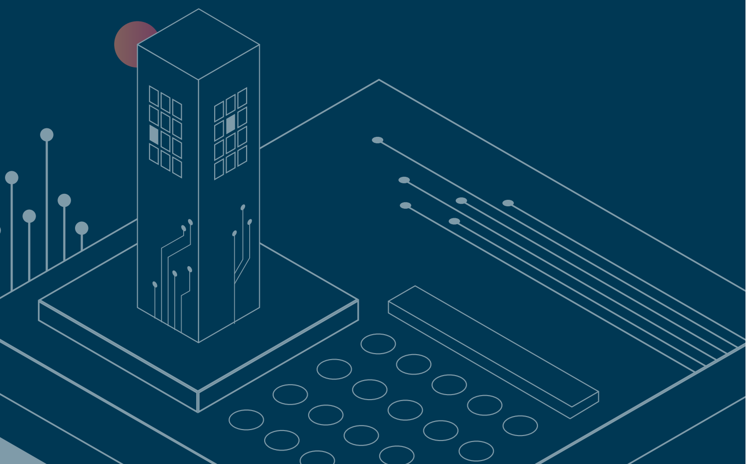
APAC Contact Centre CX Platforms with AI Buyers Guide

2026 EDITION

Audrey William,
Founder & Principal Analyst,
CrayonIQ

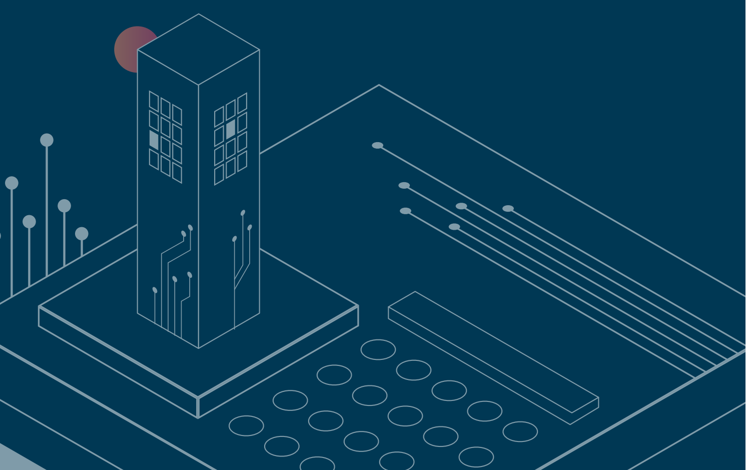
Michael Clark,
Principal Advisory Strategist,
CrayonIQ

Table of Contents



01

Introduction & Market Overview



About the 2026 Buyers Guide

The Asia Pacific contact centre market is entering a new phase of AI transformation. Enterprise buyers can no longer treat contact centre decisions as platform migrations centred on voice, routing and reporting. That framing worked when the core assumption was simple: people handled the interactions and technology routed, recorded and measured them.

That assumption is breaking down.

The next generation of customer service platforms will not be defined only by channels, queues, IVR flows or agent desktops. They will be defined by how well they orchestrate work across humans, AI agents, data, systems and workflows. Agentic systems are now beginning to verify eligibility, initiate transactions, update records, summarise interactions, trigger back-office actions and notify customers without manual intervention. This changes what buyers should evaluate.

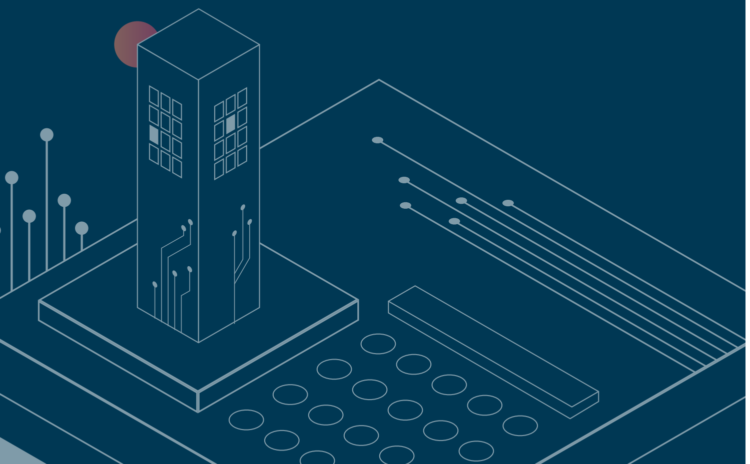
The future contact centre will increasingly operate as an intelligence and orchestration layer. AI agents will sit beneath, beside and across the software stack, drawing on customer data, knowledge sources, business rules, workflow engines and enterprise applications to resolve issues faster and more consistently. Enterprises will not deploy one AI agent. They will deploy multiple specialised agents across voice, service recovery, billing, compliance, quality, workforce support, sales, back office and proactive customer engagement.

This makes infrastructure, data architecture, integration, governance and cost transparency non-negotiable. The question is no longer simply, “Which Contact Centre platform should we buy?” The better question is, “Which ecosystem gives us the safest, most scalable and most commercially transparent foundation for AI-enabled service?”

This is the second edition of the Asia Pacific Contact Centre CX Platforms with AI Buyers Guide. Its purpose is to help buyers across the region assess the vendor landscape with a practical, independent and regionally relevant lens. Global analyst reports remain useful, but they often reflect North American market assumptions. Asia Pacific requires a different view.

01

Introduction & Market Overview



What is Unique About Asia Pacific?

Asia Pacific is not one market. It is a collection of mature, emerging and highly regulated markets with different levels of cloud adoption, AI readiness, digital maturity, language complexity and regulatory constraint.

A financial services organisation in Singapore will not evaluate AI-enabled contact centre technology the same way as a bank in Australia, an insurer in Japan, a telco in Malaysia, a government agency in India or a BPO operator in the Philippines. Each market brings different requirements around data sovereignty, privacy, language localisation, security, resilience, procurement, local support and partner capability.

More than half of the Asia Pacific contact centre market remains on-premise or hybrid. This creates a significant opportunity for vendors that can support cloud migration, hybrid architecture and on-premise AI use cases. Some enterprises will move to CCaaS over the next 12 to 24 months. Others will not. Highly regulated, high-volume or mission-critical organisations may continue to require call recording, sensitive customer data, authentication processes or operational controls to remain on-premise or within tightly governed environments.

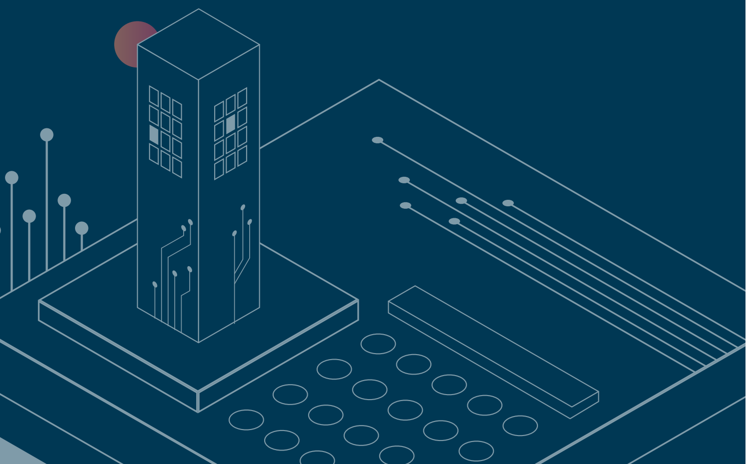
Sovereignty is also more complex in Asia Pacific than in many Western markets. Privacy law, cross-border data transfer rules, AI governance frameworks, security requirements and model deployment expectations differ by country. In the United States, enterprise buyers often default to AWS, Microsoft Azure or Google Cloud. In Asia Pacific, buyers may also consider Alibaba Cloud, Huawei Cloud, NTT, regional telco cloud environments and sovereign cloud options depending on market, industry and regulatory posture.

This means hyperscaler alignment is becoming a strategic buying factor. AI and data are now central to enterprise transformation, so deployment patterns will increasingly depend on the buyer's broader cloud, data and AI strategy. Regional data centre presence in markets such as Singapore, Sydney, Tokyo, Mumbai and Seoul is now a baseline expectation for many enterprise deals, not a premium feature.

The partner ecosystem is equally varied. Global systems integrators remain important, particularly for large transformation programs. However, local partners, specialist AI firms, telco partners and Tier 2 consulting firms are also winning significant work. In markets such as Japan and South Korea, local relationships and implementation credibility can matter as much as global vendor brand. In Southeast Asia, nimble AI-native partners are increasingly shaping voice AI, language localisation and proof-of-value deployments.

01

Introduction & Market Overview



Key Market Trends for 2026

Voice is being redefined, not replaced

Voice remains critical across Asia Pacific, particularly in regulated industries, complex service environments and multilingual markets. However, voice is changing from a channel into a data-rich AI interface. Real-time transcription, intent recognition, summarisation, compliance monitoring, sentiment, authentication and agent assist are becoming core buying requirements.

The next battleground is regional language capability

Asia Pacific's language complexity is a major differentiator. Buyers need AI that can handle Bahasa Indonesia, Bahasa Malaysia, Singlish, Tagalog, Hindi, Tamil, Japanese, Korean, Mandarin, Cantonese, Thai, Vietnamese and local dialects, accents and colloquialisms. Generic English-first models will not be enough. This creates space for AI-native vendors, local partners and specialist language models to compete against global platforms.

AI-Native Vendors are redefining what the buyer is purchasing

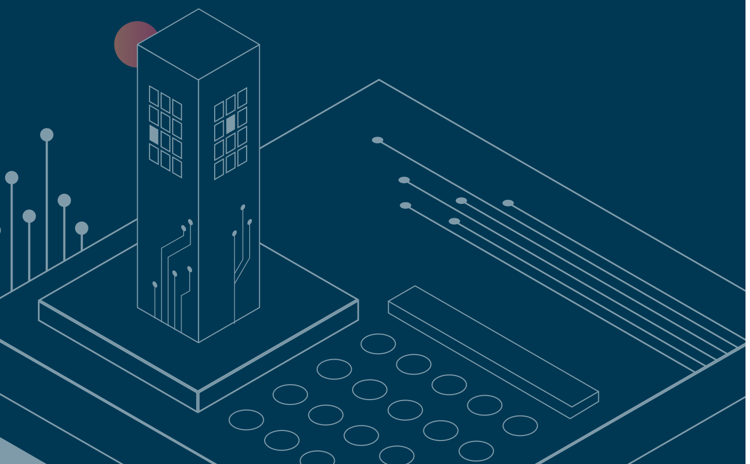
For nearly two decades, enterprises in Asia Pacific invested in a contact centre solution from Genesys, NICE, Avaya, Cisco and others. The AI native vendors are bringing a different value proposition to disrupt the traditional model. Sierra, Decagon, and adjacent players aren't selling better IVR or Routing or WEM. They're selling resolution. The category language has shifted from agent seats and minutes to containment and outcomes. These vendors can sit as an overlay on top of the traditional Contact Centre solutions. Some of these vendors offer a managed service which includes forward deployed engineers. They will sell the Human + AI value proposition and bring in AI engineers to the fold. This is a different shift altogether to what the industry has been used to.

Tokenisation and AI cost transparency will become a procurement issue

AI pricing is still immature. Buyers are already struggling to understand the true cost of tokens, prompts, model usage, transcription, storage, analytics, summarisation, bot sessions, agent assist and workflow automation. In 2026, commercial transparency will become a major buying criterion. Vendors that cannot clearly explain consumption models, cost controls and ROI assumptions will face greater resistance.

01

Introduction & Market Overview



Skills and capability gaps will constrain adoption

The limiting factor for AI adoption will often be people, not technology. Many enterprises lack mature capability in conversational design, prompt engineering, knowledge management, workflow design, data governance, AI testing, AI operations and human-in-the-loop quality assurance. Vendors and partners that bring enablement, co-design and operational change capability will have an advantage.

Governance will move from theory to operating discipline

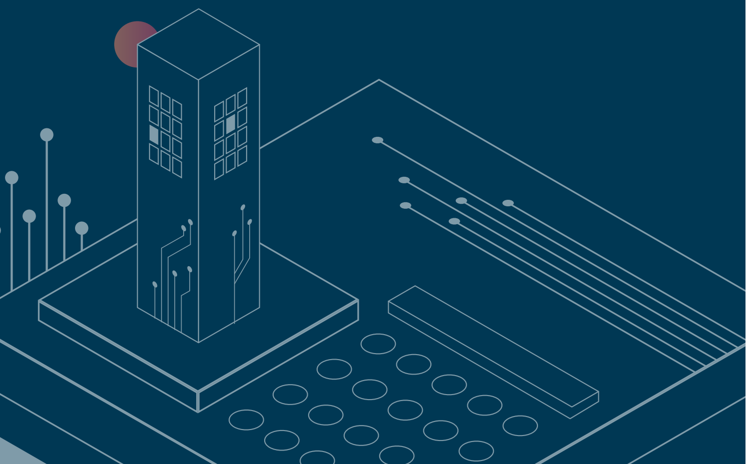
AI governance can no longer sit in policy documents alone. Enterprises will need practical controls for model selection, data access, privacy, bias, hallucination, escalation, auditability, customer consent and incident management. In contact centres, poor governance can directly affect vulnerable customers, complaint handling, financial outcomes and regulatory exposure.

Security, fraud and identity will become more important

Voice cloning, synthetic speech, deepfake-enabled fraud and automated social engineering are increasing the risk profile of the contact centre. Traditional knowledge-based authentication and legacy voice biometrics may not be enough. Buyers should assess vendors for layered authentication, fraud detection, liveness detection, behavioural signals, audit trails and integration with enterprise security tooling.

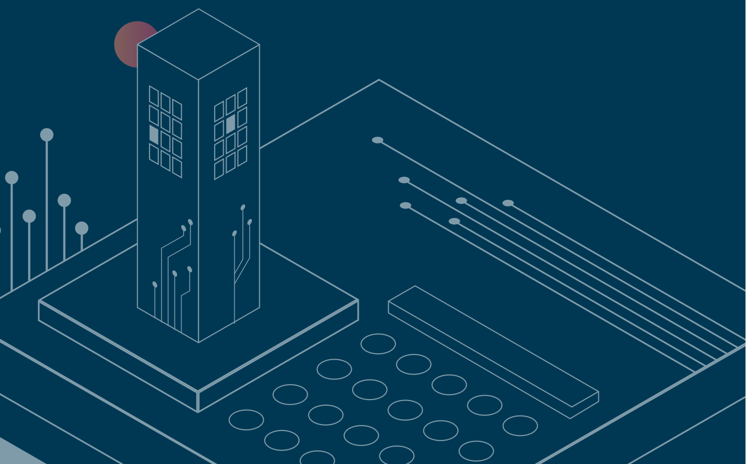
Outcome measurement will mature

Traditional contact centre metrics such as average handle time, service level and abandonment rate will remain useful, but they are no longer sufficient. Buyers should expect vendors to demonstrate value through containment quality, resolution accuracy, customer effort, compliance improvement, cost-to-serve reduction, revenue uplift, employee experience and risk reduction.



APAC Sub-Regions Covered

Sub-Region	Markets	Key Deployment Characteristics
ANZ	**Australia, New Zealand**	Cloud-forward. Enterprise adoption mature. Regulation-aligned.
North Asia	**Japan, South Korea**	On-prem / hybrid dominant. Local language AI critical. Strict data sovereignty.
ASEAN	**Singapore, Indonesia, Thailand, Malaysia, Philippines, Vietnam**	Mixed. Singapore cloud-forward. Broader ASEAN hybrid. Language diversity significant.
South Asia	**India**	Rapid cloud migration. Large BPO sector. AI adoption accelerating.



How Enterprises Buy Contact Centre Solutions in 2026

The way organisations procure customer experience technology continues to evolve. While contact centre decisions were traditionally owned by customer service and operations teams, AI has expanded the buying group to include CIOs, data leaders, security teams, digital transformation functions and executive stakeholders.

In 2026, most enterprise purchases originate from one of four procurement pathways, with a fifth pathway emerging.

1. Contact Centre Platform-Led

This remains the most common procurement approach across Asia Pacific.

Organisations begin with a dedicated contact centre platform provider and evaluate solutions based on routing, telephony, workforce engagement, quality management, analytics, AI and customer experience capabilities.

This pathway is most common where the contact centre is viewed as a strategic operating function requiring specialised capabilities and deep customer service expertise.

Representative vendors include Genesys, Verint, NiCE, Cisco, Talkdesk, Zoom, RingCentral, Avaya, Dialpad, Mitel and 8x8.

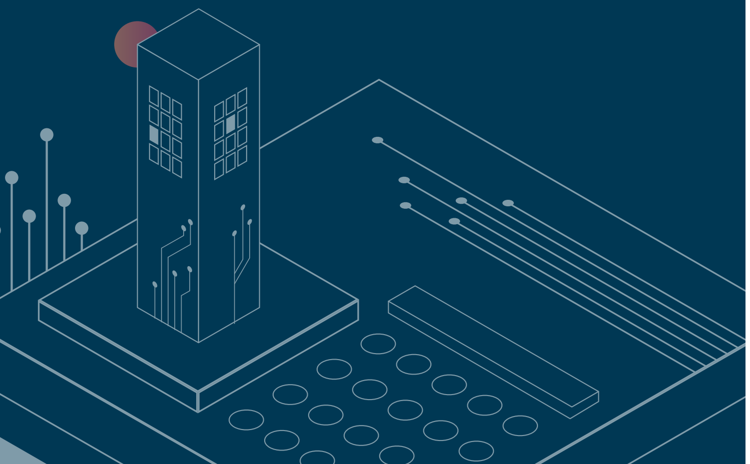
2. CRM and Service Platform-Led

An increasing number of organisations begin their customer service transformation from the CRM or service management layer rather than the contact centre.

In this model, customer records, workflows, case management, knowledge and AI orchestration become the primary control point, with voice and digital interactions integrated into the broader customer experience platform.

This approach is particularly common where organisations have already standardised on a CRM or service platform and want to extend existing investments.

Representative vendors include Sprinklr, Salesforce, Zendesk, ServiceNow and Microsoft.



3. Developer and API-Led

This approach is typically adopted by digitally mature organisations with strong internal engineering capability.

Rather than purchasing a fully integrated contact centre platform, organisations assemble customer experience capabilities using APIs, communications services, AI models and workflow platforms.

This model offers significant flexibility but requires greater investment in architecture, integration and operational management.

Representative vendors include Twilio and Vonage.

4. Hyperscaler and AI Platform-Led

A growing number of enterprises now view customer experience as part of a broader cloud, data and AI strategy.

In this model, procurement is often CIO-led and aligned to existing cloud investments. Contact centre capabilities are acquired alongside infrastructure, AI services, data platforms, security services and enterprise architecture standards.

As AI becomes increasingly dependent on orchestration, data access and model governance, hyperscalers are becoming strategic customer experience platforms rather than simply infrastructure providers.

Representative vendors include Amazon Web Services, Microsoft and Google Cloud.

The Growing Fifth Pathway: AI-Native Transformation

While still emerging, a fifth procurement pathway is beginning to appear but is expected to accelerate over the next three years as agentic AI adoption increases some organisations are starting with AI outcomes rather than contact centre requirements. Their initial focus is reducing customer effort, automating service transactions, improving employee productivity or deploying AI agents. The contact centre platform becomes one component of a broader AI transformation program. AI Native Vendors in this space include Sierra and Decagon.

02

Vendor Criteria & Entry Thresholds

This Buyers Guide continues to evaluate vendors capable of serving mid-market to enterprise Contact Centres across Asia Pacific with AI-enabled CX capabilities.

Selection is based on evidence of active engagement in the region, compliance with local requirements, platform capability, and demonstrated impact on customer experience.

Vendors were selected based on the believed capability to meet requirements that would result in them being active and influential within the APAC region.

Vendors were selected based on demonstrated capability across the following criteria:

Criterion	2026 Standard
Established APAC Presence	Local customers, offices and GTM capability across at least two APAC sub-regions.
APAC Data Sovereignty Compliance	Regional data residency, in-country infrastructure where mandated by regulation.
AI-Enabled CX Capability	Clear evidence of enterprise adoption of CX tools and live AI deployments delivering measurable outcomes. Prototypes do not qualify.
Platform Depth or Breadth	Deep specialisation in CX stack areas (WEM, analytics, routing) or full-stack CCaaS coverage.
Partner Ecosystem Strength	Robust APAC partner network spanning sales, implementation and managed services.
Innovation Velocity	Demonstrated ability to evolve the platform and roadmap in response to CX and AI trends (e.g. forward deployed engineers, agentic AI, outcome as a service model)
Mid-Market to Enterprise Fit	Evidence of scaling in complex APAC environments — multi-region, regulated, vertical-specific.
Customer Evidence	Verifiable APAC client outcomes. North American or European references do not substitute.

Vendors on the Watchlist

The contact centre and customer experience market continues to evolve rapidly. Several vendors were reviewed as part of this year's research and, while not included in the formal evaluation, have demonstrated sufficient market momentum, innovation or strategic relevance to warrant ongoing monitoring.

These vendors may be considered for inclusion in future editions as their market presence, customer adoption and enterprise capabilities continue to mature.

Toku

Toku is emerging as one of the more interesting challengers in Southeast Asia. The company has established partnerships with AWS, Cisco and Verint while simultaneously developing its own customer engagement, CCaaS and AI capabilities.

With growing momentum across ASEAN markets and increasing investment in AI-powered customer engagement, Toku represents a vendor to watch closely over the next 12 months.

Content Guru

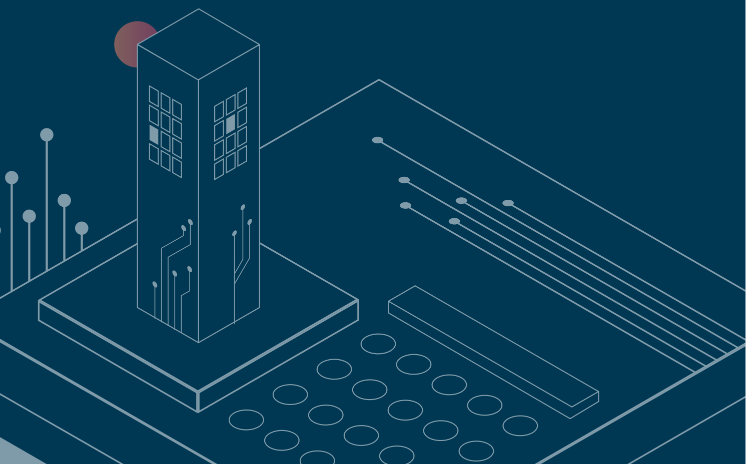
Content Guru is an established enterprise contact centre provider with a strong reputation in government, utilities, emergency services and highly regulated industries. While its visibility across Asia Pacific remains lower than many of the vendors included in this guide, it possesses a mature platform, growing AI capabilities and a track record of large-scale deployments globally.

Now with an office in Japan, and rumours of APAC expansion, further engagement and market validation across Australia, New Zealand and Southeast Asia will determine its suitability for inclusion in future editions.

Why Some Vendors Were Not Included

Exclusion from this guide should not be interpreted as a lack of capability. Vendors may be excluded for several reasons, including limited enterprise market presence, insufficient Asia Pacific deployment activity, specialised use-case focus, or a primary concentration outside the contact centre and customer experience market.

The objective of this guide is not to catalogue every vendor operating in the region. Rather, it is to provide enterprise buyers with a practical assessment of the providers most likely to appear in strategic CX, contact centre and AI transformation initiatives across Asia Pacific.



Evaluation Framework & Weightings

This guide applies the same two-axis evaluation framework as the 2025 edition, with the axis definitions held constant year over year so vendor positions can be compared across editions. Each vendor is scored on two dimensions: AI Vision and Capability, weighted at 50 percent, and Strategic Impact on CX, weighted at the remaining 50 percent.

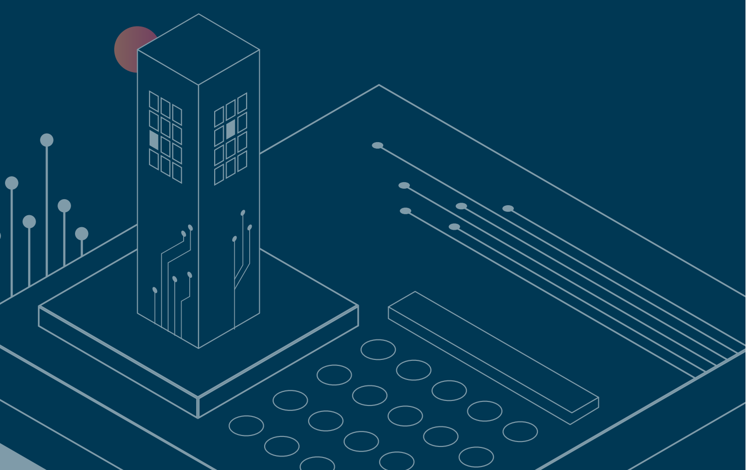
The weighted combination of the two produces each vendor's overall rating and ranking. Consistent with the year-over-year principle, the axis definitions are unchanged from 2025; the refinements for 2026, AI fixed at 50 percent rather than a range and Asian Language NLP scored formally for the first time, are flagged here so cross-edition comparisons stay transparent.

AI Vision and Capability — 50%

Sub-Criterion	Weight	What Is Assessed
AI Agents Delivering Functional Outcomes & Co-Innovation	**25%**	Evidence of AI agents performing meaningful business tasks beyond information retrieval. Includes workflow execution, transaction completion, back-office automation, customer service resolution, measurable customer outcomes and demonstrated customer success stories. Vendor willingness to co-innovate with customers is also assessed.
Conversational AI & Autonomous Interaction Capability	**20%**	Ability to deliver natural voice and digital interactions across customer service, sales and support use cases. Includes conversational quality, intent recognition, context retention, multilingual support, voice quality and deployment flexibility across channels.
Asian Language NLP & Regional AI Readiness (New for 2026)	**20%**	Support for Mandarin, Cantonese, Japanese, Korean, Thai, Vietnamese, Bahasa Indonesia, Bahasa Malaysia, Tagalog and Indian languages. Assessment includes dialect recognition, accent handling, language localisation and regional deployment maturity.
Responsible AI, Governance & Cost Transparency	**15%**	AI governance frameworks, auditability, explainability, human oversight controls, security protections, compliance alignment, model transparency, token visibility and cost predictability.
Voice & Text Analytics, Social Listening & Voice of Customer	**10%**	Ability to transform unstructured customer interactions into actionable insight. Includes sentiment analysis, topic discovery, customer journey intelligence, social listening and operational recommendations.
Third-Party AI Integrations & Model Flexibility	**5%**	Support for external AI ecosystems including OpenAI, Anthropic, Google, AWS, Microsoft and other regional AI providers. Assessment includes API maturity, model flexibility and customer choice.
AI Orchestration & Workflow Automation	**5%**	Ability to coordinate AI agents, humans, workflows, business rules and enterprise systems. Includes workflow orchestration, task automation, handoff management and operational scalability.

03

Evaluation Framework & Weightings



Strategic Impact on CX — Remaining 50%

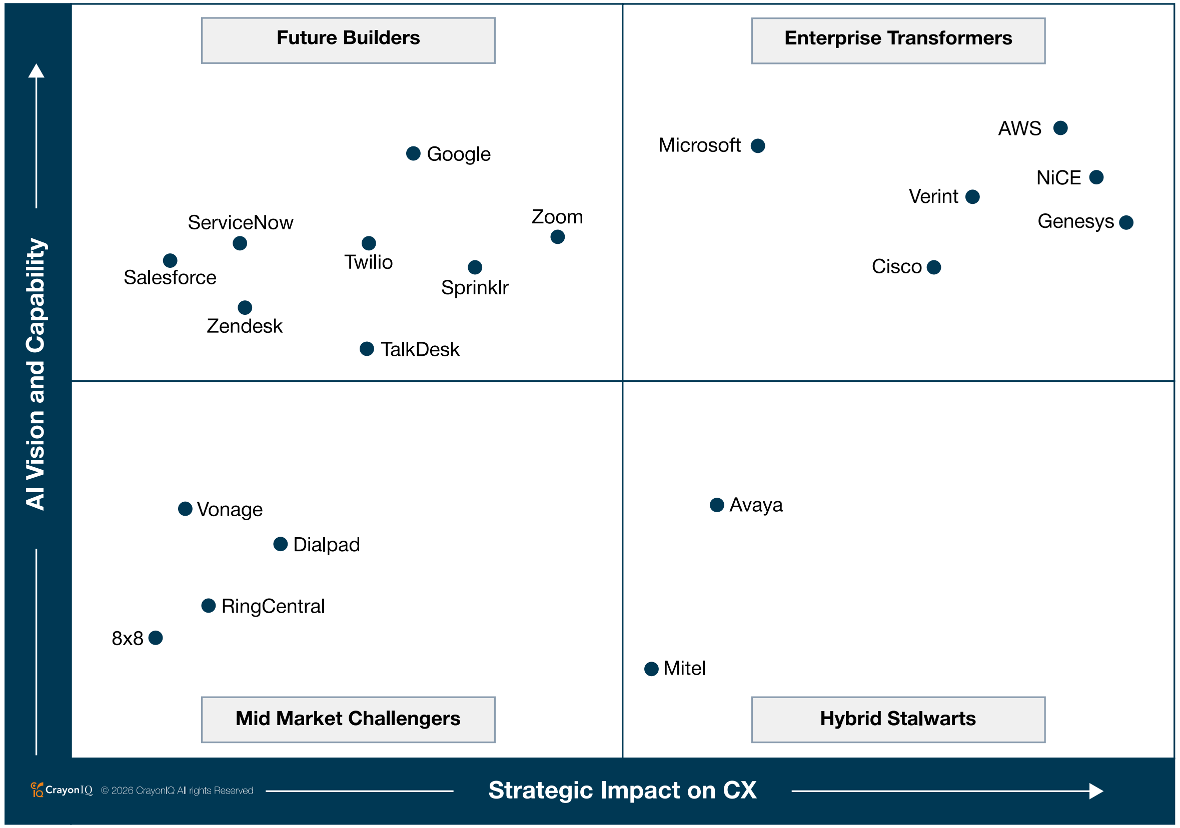
Sub-Criterion	Weight	What Is Assessed
Platform Architecture & Deployment Flexibility	**20%**	Cloud, hybrid and on-prem deployment options, omnichannel routing, telephony architecture, BYOC capability, scalability, resiliency and deployment flexibility across APAC markets.
Voice & Interaction Management	**15%**	Voice quality, telephony coverage, carrier ecosystem, SIP capabilities, recording, transcription, interaction routing, digital channel management and customer interaction orchestration.
Data, Analytics & Intelligence	**15%**	Real-time analytics, customer journey intelligence, predictive insights, reporting, data fabric, open APIs, operational intelligence and ability to support enterprise AI strategies.
Security, Compliance, Sovereignty & Trust	**15%**	ISO, SOC, PCI, privacy controls, AI data protection, regulatory compliance, data residency, sovereign cloud options, on-prem deployment support and governance controls.
Platform Ecosystem, Integration & Composability	**15%**	API maturity, developer ecosystem, CRM integrations, workflow orchestration, marketplace depth, AI ecosystem partnerships and ability to support composable architectures.
Workforce Engagement & Human-AI Operations	**10%**	Workforce management, quality management, coaching, performance management, workforce optimisation, AI-assisted coaching and support for blended human and AI workforces.
Commercials, Viability & Ecosystem Strength	**10%**	Pricing transparency, AI cost predictability, vendor financial stability, roadmap maturity, implementation ecosystem, partner strength and long-term strategic viability.

04

2026 Quadrant

Quadrant Definitions

Quadrant	Position	Description
Enterprise Transformers	**Top Right**	Leading providers successfully combining enterprise-scale customer experience operations with advanced AI, automation and orchestration capabilities. These vendors are best positioned to support large-scale AI-enabled service transformation across Asia Pacific.
Hybrid Stalwarts	**Bottom Right**	Mature platforms recognised for operational depth, voice excellence and deployment flexibility. Particularly strong in regulated, sovereign and hybrid environments where reliability, control and compliance remain critical buying factors.
Future Builders	**Top Left**	Innovation-led vendors advancing AI agents, orchestration and automation capabilities faster than their regional contact centre footprint. Often influential in shaping future market direction despite a smaller installed base.
Mid-Market Challengers	**Bottom Left**	Growth-oriented vendors building both AI capability and market presence. Typically, strongest in mid-market and targeted enterprise opportunities where speed, flexibility and commercial simplicity are valued over scale.

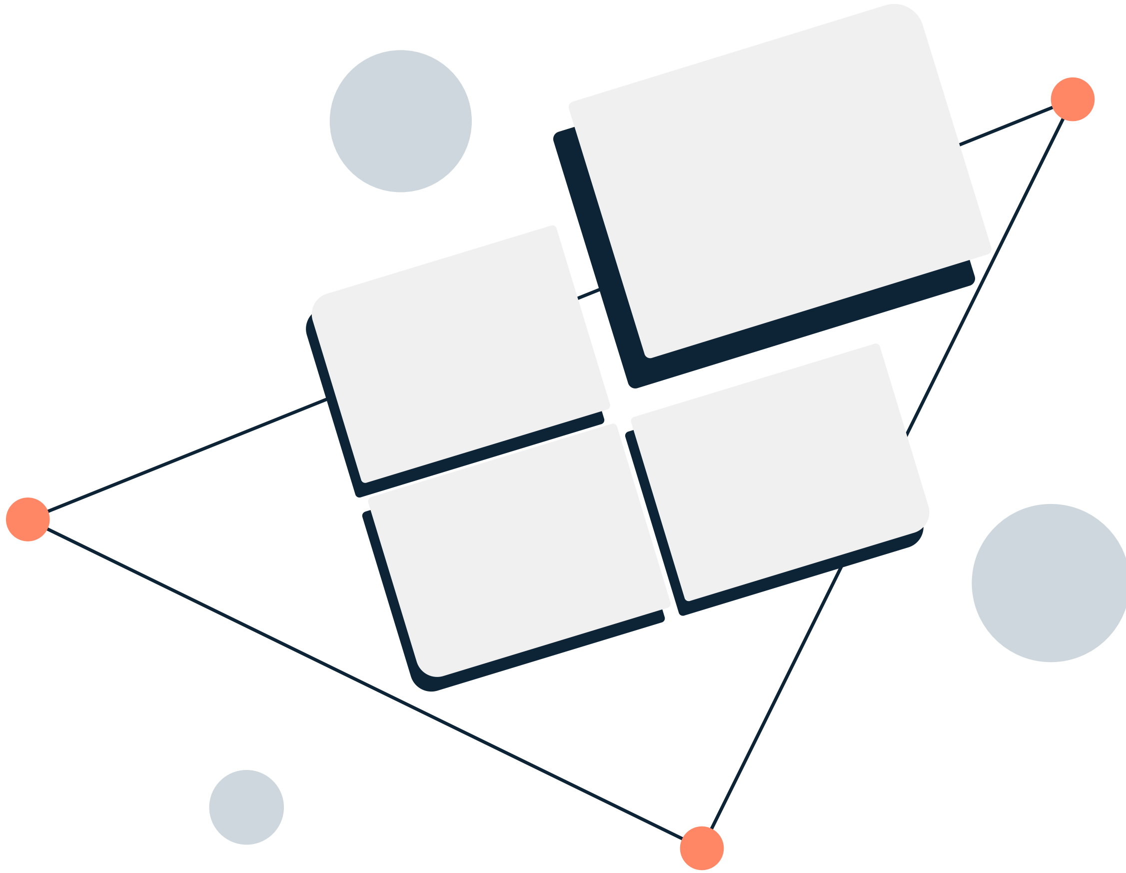


Enterprise Transformers	Future Builders	Mid-Market Innovators	Hybrid Stalwarts
AWS, Cisco, Genesys, Microsoft, NiCE, Verint	**Google, Salesforce, ServiceNow, Sprinklr, Talkdesk, Twilio, Zendesk, Zoom**	**8x8, Dialpad, RingCentral, Vonage**	**Avaya, Mitel**

05

Vendor Assessments

Vendors are assessed in alphabetical order. Each assessment follows the same structure.



8x8

Vendor
8x8

Quadrant
Mid-Market Challenger

Category
CCaaS and CPaaS Native

Procurement Pathway
CC Platform-Led

CPaaS Momentum Drives Growth in the ASEAN region.

Against the 2025 Outlook

The 2025 read positioned 8x8 as a mid-market unified-platform and CPaaS player rather than an enterprise contact centre contender, and that has held. The CPaaS momentum thesis was borne out, sharpened by the Maven Lab acquisition and the PLDT integration across ASEAN. Where the prior outlook was too generous: the contact centre business has not kept pace, and CCaaS remains the underdeveloped leg of the story in the region.

Key Findings

The Acquisition of Maven Lab boosts its CPaaS play in ASEAN

A major move came in January 2026 when 8x8 acquired Maven Lab, a Singaporean mobile marketing and enterprise messaging vendor, to accelerate its end-to-end customer engagement strategy across the Asia-Pacific region. Maven Lab had spent years building carrier relationships and API integrations for high-volume messaging in Singapore, Malaysia, and the broader region. For 8x8, acquiring these pre-built capabilities means it can offer global clients immediate access to local APAC markets without the years needed to build carrier redundancy and compliance frameworks from scratch.

ASEAN is the Growth Engine

8x8 has been expanding aggressively in the Philippines. In February 2026, 8x8 launched Silent Mobile Authentication in the Philippines in partnership with PLDT Enterprise. The solution integrates PLDT's SmartSafe Silent Access into the 8x8 Connect platform, allowing businesses to verify users without OTPs. They are expanding their CPaaS activities through partners in Indonesia, the Philippines, Malaysia, and Singapore. The momentum for them has been growing well in ASEAN and less so in ANZ.

CCaaS Momentum is Sporadic

Its CCaaS is capable but not category-leading in Asia Pacific, and buyers with very large or very specialised contact centre requirements will likely find deeper solutions elsewhere. To make greater inroads into the CCaaS market, 8x8 must step up their expansion plans and this includes having solid partners in the region that can sell the UC+CCaaS+CPaaS value proposition. At this juncture, CCaaS seems to be ignored.

8x8

Vendor
8x8

Quadrant
Mid-Market Challenger

Category
CCaaS and CPaaS Native

Procurement Pathway
CC Platform-Led

12-Month Outlook

- We see 8x8 getting stronger in the ASEAN region. In short, 8x8 has been making the Asia Pacific region and Southeast Asia particularly a core growth pillar for 2026.
- Their CPaaS play is growing stronger, and this will allow them to see immediate success in the next 12 months in logistics, eCommerce, healthcare, fintech — that need reliable A2P SMS, OTP delivery, WhatsApp, and RCS across Southeast Asian markets. The Maven Lab acquisition and PLDT integration make 8x8 particularly strong in the region.
- 8x8 has the potential to be a strong mid-market player in the Asia Pacific region. At this stage they will need to elevate their play in the contact centre space through specialist partners and greater marketing to elevate the overall brand of the company
- At CCW in June, 8x8 launched AI Routing alongside AI Studio. AI Routing matches customers across the entire organisation, not just the contact centre, evaluating agents, subject-matter experts and back-office staff simultaneously. It builds skill profiles automatically from interaction transcripts and sentiment rather than manually maintained profiles, with admin review before changes take effect, and exportable audit trails showing why each interaction was routed where. This tackles routing as a governance surface, and is a quiet shot at the "skills-based queuing is stale data" problem most enterprises actually live with.
- 8x8's APAC story is strongest as a unified platform play for the midmarket and as a CPaaS powerhouse for enterprise messaging particularly in Southeast Asia.

Vendor
Avaya

Quadrant
Hybrid Stalwart

Category
Legacy CC & UC Platform

Procurement Pathway
CC Platform-Led

A Large Installed Base; Strength in Highly Regulated and Mission Critical Industries

Against the 2025 Outlook

The 2025 outlook framed Avaya as a retention play anchored in regulated, mission-critical voice, and that core has held, with Japan still the standout market. What the prior view under-weighted is execution risk from the restructuring: the reorganisation into separate Asian theatres and the cost programme have thinned coverage in ASEAN, ANZ and India even as Avaya Infinity orchestration story for customer experience and Avaya Nexus for critical communications infrastructure give the installed base a credible AI path.

Key Findings

Voice Reliability Remains Avaya's Core

Avaya stands out for one thing above all else: reliability and control over mission-critical voice in highly regulated, large-enterprise environments in the APAC region. Many APAC enterprises, especially in regulated industries, are not ready to leap to cloud-only solutions and will not do so in the many years to come. This is due to infrastructure fragmentation, sovereignty concerns, or regulatory mandates.

Japan remains a stronghold for Avaya

Japan is the strongest Avaya market in APAC and arguably one of its strongest globally. They have a strong foothold with large banks and insurers and enterprises in highly regulated markets. It also continues to have some of the largest and most loyal partners in the Japan market. Strong cultural and regulatory preference for on-premises and sovereign infrastructure. Mission-critical voice is still highly valued especially in BFSI, government, and emergency services.

The Launch of Avaya Nexus in 2026

This is the most significant new product announcement this year. It is a mission-critical voice platform purpose-built for regulated industries (government, healthcare, financial services, and emergency services) where voice downtime is simply not acceptable. Avaya Nexus features zero-downtime architecture, high-fidelity voice clarity, hardened security, and cloud-native deployment flexibility which presents itself well for its base of customers in mission- critical industries in the APAC market.

Vendor
Avaya

Quadrant
Hybrid Stalwart

Category
Legacy CC & UC Platform

Procurement Pathway
CC Platform-Led

The Avaya Infinity Customer Experience Platform with AI orchestration

Introduced in 2025, Avaya Infinity is a next-generation, AI-powered Customer Experience platform designed to unify enterprise data, AI, employee workflows, and customer interactions into a single, real-time connection. Its open AI orchestration layer is deliberately not tied to a single AI provider. Customers can bring multiple AI applications, tools, and LLMs into play behind one seamless experience, with Avaya providing the orchestration for the backend data flow, security, and context.

This positioning reads the market correctly: briefings conducted for this guide consistently indicate enterprises want to work across multiple LLM and AI app and tool providers. For Avaya's installed base, an AI-agnostic orchestration story attached to existing hybrid and on-premises contact centre infrastructure is a credible answer to the question every Avaya customer is asking: how do we get AI without leaving? Japan is the sharpest test case, where an ageing population, acute scarcity of contact centre agents, the near-impossibility of offshoring Japanese-language work, and a cultural preference for human empathy in service interactions combine to make selective AI augmentation, rather than wholesale automation, the buyer demand.

A restructured, concentrated, partner-led operating model

Avaya reorganised its international business in late 2025 into distinct operating theatres across Asia, with East Asia (Japan, Korea, Greater China) and the India, ASEAN and ANZ markets run as separate units, and a deliberately indirect, partner-heavy go-to-market. The model concentrates on a small managed-partner tier that carries most revenue, with the remainder transacting through distribution, and splits coverage between high-touch global enterprise accounts and a sub-enterprise segment served through select channel partners on the Avaya Infinity platform. On-the-ground presence is maintained across the major Asian markets. For buyers, the practical read is twofold: in markets where Avaya's managed partners are strong, notably Japan, Taiwan and the Philippines, delivery capability is solid; effectively navigating streamlined markets means prioritizing partners with experience and deep talent pools to secure a stable and sustainable collaboration for your business.

Vendor
Avaya

Quadrant
Hybrid Stalwart

Category
Legacy CC & UC Platform

Procurement Pathway
CC Platform-Led

12-Month Outlook

- Avaya's APAC strategy currently appears to have a significant focus on retention. Its strengths are real and this includes reliability, voice quality, compliance, and massive legacy installations in financial services, public sector, and BPOs.
- For enterprise buyers in regulated APAC markets particularly government, banking, and healthcare in Singapore, Hong Kong and Japan, Avaya's hybrid/on-prem positioning is strong. Many of these organisations have data localisation requirements that pure-cloud CCaaS vendors struggle to satisfy. The Avaya Infinity strategy with MCP-based AI orchestration could offer a path to AI-enabled CX without forced cloud migration, which may resonate strongly with the incumbent Avaya installed base in the region.
- No other vendor in the market has the same depth of on-premises deployment expertise, the same scale of existing installations in government and financial services, or the same ability to let customers stay on-premises while gradually adopting cloud capabilities.
- The organisational turmoil has had a greater impact in some regions, including ASEAN, ANZ and India. This has left many of their customers wanting to know about Avaya's future roadmap and where they are headed. The results of cost restructuring have been exceeding financial goals and delivered the strongest cash position and profitability in years. For a business historically bogged down by debt and cash burn, this financial stabilisation is non-negotiable.

Vendor Assessments

Vendor

AWS (Amazon Connect Customer)

Quadrant

Enterprise Transformer

Category

Hyperscaler

Procurement Pathway

Hyperscaler and AI Platform-Led

Impressive Growth, Hyperscaler Advantage and Accelerated AI Innovation

Against the 2025 Outlook

The 2025 guide called accelerated APAC growth, deeper partner enablement and localised proof points. That has largely played out: Japan and Korea momentum is real, Bedrock has moved from talking point to deployed AI capability, and Amazon Connect Customer is displacing incumbents in regulated industries rather than simply greenfield opportunities.

Where the previous outlook understated the market was the speed at which CIO-led AI consolidation has favoured AWS over standalone CCaaS vendors. Where it overstated progress was partner maturity, which continues to vary significantly outside ANZ and Japan.

Key Findings

Outstanding growth in APAC underpinned by a solid AI strategy

Amazon Connect Customer reached a $1 billion annualised revenue run rate in 2025 and they achieved it in a short span of time. Connect Customer has grown rapidly in the Asia Pacific region since its launch in June 2017. Japan, South Korea, ANZ and ASEAN are markets seeing good momentum. The Connect Customer solution is now deployed by some of the largest enterprises across APAC. They have made impressive strides into the Australian, Japanese and South Korean markets in 2025.

Its investments in Japan will be a trigger for Connect growth

AWS's total investment into cloud infrastructure in Japan from 2011 to 2027 is estimated to be 3.77 trillion yen. That scale of commitment means Japanese CIOs have increasingly standardised on AWS. Once they buy Amazon Connect Customer, it's already integrated as one vendor for cloud, infrastructure and platform as a service. Many competitors in the CX space will find it hard to match this equation.

Vendor

AWS (Amazon Connect Customer)

Quadrant

Enterprise Transformer

Category

Hyperscaler

Procurement Pathway

Hyperscaler and AI Platform-Led

AI Choice Without Losing Control

AWS has deliberately avoided forcing customers into a single AI architecture. Organisations can either consume AI capabilities natively through Amazon Connect Customer, or they can build their own AI solutions by integrating Amazon Connect Customer with Amazon Bedrock and the broader AWS AI ecosystem.

This creates a fundamentally different proposition from many competitors. Rather than prescribing a single model, AWS allows organisations to choose between Amazon Nova models, Anthropic Claude, and other supported foundation models while maintaining a common framework for governance, security, observability and operational controls.

Voice AI has also advanced significantly through Amazon Nova 2 Sonic, AWS's second-generation speech-to-speech foundation model, which enables more natural voice interactions.

AI is Built In, Not Bolted on

Amazon Connect Customer's AI architecture is deeply integrated across the full AWS stack, giving it a structural advantage most CCaaS vendors cannot replicate.

At the infrastructure layer, Amazon Bedrock AgentCore acts as the control plane that lets AI agents securely connect to identity, policy, tools, and monitoring — enabling enterprises to grant agents access to real backend systems without compromising governance. Within Amazon Connect Customer, AI agents can now tap into multiple Amazon Bedrock knowledge bases simultaneously, accessing enterprise-wide knowledge repositories to deliver accurate, contextual responses in real time.

For voice interactions, Amazon Connect Customer is anchored by Amazon Nova 2 Sonic, AWS's second-generation speech-to-speech foundation model announced at re:Invent in December 2025. It integrates natively with Amazon Connect Customer through Bedrock's bidirectional streaming API, enabling real-time, human-like voice conversations directly within the contact centre flow.

Combined with Amazon Bedrock's model choice (200+ foundation models from 17 providers) and built-in governance controls (Guardrails, IAM, observability), Amazon Connect Customer delivers an end-to-end AI-native CX platform that most competitors are still assembling through partnership or acquisition. The AI isn't bolted on — it's woven into the same infrastructure the contact centre already runs on.

Vendor

AWS (Amazon Connect Customer)

Quadrant

Enterprise Transformer

Category

Hyperscaler

Procurement Pathway

Hyperscaler and AI Platform-Led

Amazon Connect's four-product expansion and the strategy behind it

On April 28, 2026, AWS expanded Amazon Connect into a family of four agentic AI solutions built on real-world learnings about how business functions transform when employees and AI agents work together.

This family of solutions connects people with AI to achieve more across customer experience, recruitment, healthcare, and supply chain - extending the Amazon Connect name to deliver connected outcomes in every business function. The rename formalises a direction of travel rather than announcing a new one and putting Customer in the product name aligns with AWS's argument that resolution, not deflection, is the metric that matters.

The flip side: CX now competes for executive attention with three other verticals inside the same applied AI organisation. Buyers should test roadmap commitments against that broader agenda rather than assume contact centre primacy.

The NLX acquisition attacks the solutions' known weakness

Amazon Connect Customer has always rewarded organisations with strong internal engineering or capable System Integration partners and punished those expecting a packaged CCaaS experience. The acquisition of NLX, a no-code conversational AI platform, on 23 April 2026 is aimed squarely at that constraint, making AI deployment accessible to non-engineering teams.

AWS states NLX enables deployments 'in weeks rather than months.' Business teams design and launch directly on a visual, no-code canvas, without waiting for engineering to design and implement the conversational experience. Technical teams can still step in and build custom logic wherever your business needs it.

If the integration lands, the largest single objection to Amazon Connect in APAC procurements weakens materially. Until it does, buyers should still treat build effort as the primary determinant of deal success and pressure-test it in due diligence.

Vendor

AWS (Amazon Connect Customer)

Quadrant

Enterprise Transformer

Category

Hyperscaler

Procurement Pathway

Hyperscaler and AI Platform-Led

Solid investment in Partners across the region

AWS has ramped up and built some of the most successful partnerships in the APAC region. Some of these partnerships are a combination of large global system integrators, local system integrators and specialised AWS Connect Customer Partners. They have a solid partner program which allows partners to get Marketing Development Funds (MDF) and this has helped some of their partners propel to greater heights. Partner depth remains strong in ANZ and Southeast Asia and is growing in the North Asia region.

AWS has also recently consolidated and streamlined its APJ (Asia Pacific & Japan) partner programs to make it easier for partners to access technical blueprints and co-selling support. The investments made towards its partners are demonstrating how AWS takes innovation seriously. They are investing in partners that are building unique capabilities for the customer on the back of AWS and co-innovating with the customer in their AI journey. This is not just about the basic selling of the Amazon contact centre solution. These partners have now grown their footprint from selling to SMB to large accounts. AWS's ability to also work with large SI's in the last 12 months has garnered them some large wins in the region winning against some of the leading vendors in the contact centre segment.

Vendor

AWS (Amazon Connect Customer)

Quadrant

Enterprise Transformer

Category

Hyperscaler

Procurement Pathway

Hyperscaler and AI Platform-Led

12-Month Outlook

- The Amazon Nova 2 Sonic + Bedrock model-choice combination (including Anthropic models) is a viable capability buyers should look at. The watch-item for APAC is native regional availability beyond Tokyo, with Sydney and other regions to follow especially given the strong Australian public sector demand.

- AWS is one of the few companies that can help enterprises across the agentic AI layer from Infrastructure to Apps and data to AI. They are moving heavily into autonomous agents

- AI is embedded across the AWS platform rather than bolted on through acquisition. While many competitors continue integrating acquired AI capabilities into existing platforms, AWS benefits from a unified architecture built around cloud, data, AI and customer experience. This gives buyers greater confidence in long-term integration and scalability.

- Amazon's partner ecosystem is one that is being nurtured well. They are not just working with traditional CCaaS partners. In fact, many traditional CCaaS partners might not fall into the category as an "innovative" partner for AWS. AWS is broadening its partner ecosystem that will include innovative partners that can address change management, deliver successful outcomes as the enterprise scales, building agentic capabilities, developing their own IP as partners and many more.

- NLX integration depth is the watch-item of the year: whether no-code deployment genuinely lands inside Connect Customer or remains a bolt-on, and what happens to NLX's multi-platform customers as support for non-Connect platforms becomes customer-driven. The competitive response also sharpens this cycle: NiCE post-Cognigy and a well-funded Genesys will both contest the regulated-sector deals AWS has been winning.

- In Australia specifically, a major government customer service tender is in market and AWS is widely expected to contest it. The outcome is a genuine swing factor. A win would deliver the large-scale, sovereign-grade public sector reference AWS currently lacks in this region and validate Connect Customer in the most demanding procurement environment in the market.

Vendor Assessments

Vendor

Cisco (Webex Contact Centre)

Quadrant

Enterprise Transformer

Category

Enterprise Communications Platform

Procurement Pathway

Contact Centre Platform-Led

The Silent Winner in Multi Architecture, Security and Observability

Against the 2025 Outlook

The 2025 outlook anticipated that Cisco would continue to leverage its installed base, hybrid deployment strengths and measured AI strategy rather than pursuing the aggressive AI-first positioning adopted by some competitors.

That assessment has largely proven accurate.

Cisco delivered on key regional investments, including the expansion of Webex Contact Center services through a dedicated Mumbai data centre and the rollout of Webex AI Quality Management. Momentum across ASEAN continued, particularly among large enterprises and BPOs seeking enterprise-grade architectures, strong governance and deployment flexibility.

The major watchpoint from 2025 remains unresolved. While Cisco has embraced AI across the Webex portfolio, questions remain around pricing transparency, commercial simplicity and the extent to which customers remain tied to Cisco's AI roadmap versus broader AI ecosystems.

Key Findings

Enterprise Hybrid AI delivery

Cisco remains unique among leading CCaaS providers in its ability to support AI-driven customer experience across both cloud and on-premises environments.

Through AI Orchestration Services and Webex AI Agent capabilities, Cisco has created a migration path that allows existing Unified Contact Center Enterprise (CCE) and Packaged CCE (PCCE) customers to adopt AI services without requiring immediate platform replacement.

For regulated industries, government agencies and large enterprises with significant legacy investments, this remains a meaningful differentiator.

Vendor
Cisco (Webex Contact Centre)

Quadrant
Enterprise Transformer

Category
Enterprise Communications Platform

Procurement Pathway
Contact Centre Platform-Led

One AI Fabric Across the Enterprise

Cisco's vision extends beyond the contact centre.

Its Connected Intelligence strategy seeks to create a common AI layer spanning Webex Contact Center, Webex Calling, Meetings, Collaboration, Security and Observability. Rather than treating customer service AI as a standalone capability, Cisco is positioning AI as an enterprise-wide operating layer.

This creates opportunities for organisations already invested in the Cisco ecosystem to leverage shared data, workflows and intelligence across customer-facing and employee-facing experiences.

Strong ASEAN and Indian momentum

Cisco continues to build momentum across ASEAN, particularly within financial services, telecommunications, BPO and government sectors.

The introduction of a dedicated Mumbai data centre removes a significant data sovereignty barrier and strengthens Cisco's position in one of APAC's largest and fastest-growing CX markets. The move also enhances Cisco's competitiveness against vendors that have historically held stronger regional cloud footprints.

Webex AI Quality Management Expands Platform Depth

The availability of Webex AI Quality Management marks an important milestone in Cisco's evolution from a contact centre platform provider to a broader customer experience platform.

Cisco's approach combines AI agent evaluation, human agent evaluation, coaching and quality management within a unified framework. While many competitors continue to manage AI and human performance separately, Cisco is moving towards a single operational model that measures, coaches and improves both.

This positions Cisco well as organisations increasingly deploy blended human and AI workforces.

Vendor

Cisco (Webex Contact Centre)

Quadrant

Enterprise Transformer

Category

Enterprise Communications Platform

Procurement Pathway

Contact Centre Platform-Led

12-Month Outlook

- With the India data centre GA in India for Webex Contact Center, Cisco is in a stronger position against Genesys, NICE, AWS, and local players for India-hosted CCaaS, especially where RBI (Reserve Bank of India) is emphasising on data localisation. This can materially shift competitive scoring in APAC RFPs that prioritise in-region data residency.

- In Singapore and ASEAN, Cisco is currently sitting on some large RFPs and these wins will further cement their position in ASEAN. In ANZ, Cisco will be closely watched as they rebuild the region which has seen slower growth compared to its competitors.

- If Cisco can grow its partner strategy to include local and global GSIs, there will start winning large Enterprise accounts. The consulting houses are now responsible for helping vendors win some of the largest deals in the market. Cisco has a good and differentiated strategy to boast about and the large GSIs need to hear that.

- The company's long-term differentiation increasingly extends beyond contact centre functionality. Cisco's integration of CX, collaboration, networking, security and observability creates a platform proposition few competitors can match.

- The primary watchpoint remains ecosystem openness and commercial complexity. Cisco's AI capabilities are increasingly embedded across the platform, delivering consistency and governance benefits. However, buyers should carefully evaluate integration flexibility, roadmap dependency and licensing transparency when comparing Cisco against more open AI-centric competitors.

- As observability, security and operational resilience become more important components of customer experience delivery, Cisco enters 2027 with a potentially differentiated position: not simply as a CCaaS provider, but as an enterprise experience infrastructure platform.

dialpad

Vendor

Dialpad

Quadrant

Mid-Market Challenger

Category

AI-Native CCaaS

Procurement Pathway

Contact Centre Platform-Led

AI-Native Challenger, Strongest in ANZ and the Mid-Market

Against the 2025 Outlook

The 2025 assessment positioned Dialpad as an emerging AI-native challenger with growing momentum in ANZ but limited visibility across the broader APAC market. Twelve months later, that trajectory has become clearer.

Dialpad has doubled down on its AI-first strategy through the launch of its Agentic AI Platform, expansion of no-code AI agent capabilities, and continued investment in embedded AI across the customer and employee experience lifecycle. At the same time, its regional centre of gravity remains firmly anchored in Australia and New Zealand, where it has established its strongest customer references, partner ecosystem and market presence.

While Dialpad continues to appear on larger enterprise shortlists, its sweet spot remains the SMB and mid-market segment, where simplicity, speed of deployment and bundled AI capabilities provide a compelling alternative to more complex enterprise platforms.

Key Findings

AI-Native Architecture Remains the Core Differentiator

Unlike many competitors that have layered AI capabilities onto existing contact centre platforms, Dialpad was designed with AI embedded into the core architecture.

Its multi-LLM approach, combined with proprietary speech and language technologies, allows capabilities such as transcription, summarisation, sentiment analysis, coaching and agent assistance to operate as native platform features rather than separate add-ons. This reduces implementation complexity and lowers the barrier to AI adoption for many organisations.

The October 2025 launch of the Agentic AI Platform further extended this strategy by introducing autonomous voice and digital agents built around reusable skills and workflows. Subsequent enhancements, including no-code agent design, testing and governance controls, demonstrate a growing focus on moving AI deployments from experimentation into operational production environments.

Vendor
Dialpad

Quadrant
Mid-Market Challenger

Category
AI-Native CCaaS

Procurement Pathway
Contact Centre Platform-Led

ANZ Continues to Drive Regional Growth

Dialpad's strongest market position in APAC remains Australia and New Zealand.

The company has established a credible local presence supported by regional leadership, channel partners and customer references across sectors including retail, recruitment, professional services and financial services. Its Sydney-based infrastructure and local go-to-market investment have helped establish credibility among organisations seeking modern cloud communications and contact centre platforms.

However, regional depth outside ANZ remains limited when compared with larger global competitors. While opportunities exist across Southeast Asia and North Asia, Dialpad's current market visibility and partner ecosystem are still concentrated in ANZ.

Japan Represents the Next Growth Opportunity

Dialpad has made meaningful investments in Japanese-language AI capabilities, including real-time transcription, call summaries, coaching and conversational intelligence.

This reflects a more serious localisation effort than many competitors have historically demonstrated in Japan. The market remains difficult to penetrate due to entrenched domestic providers, unique customer expectations and high localisation requirements, but Dialpad's investment suggests a long-term commitment rather than a simple market-entry exercise.

The next 12 months will provide a clearer indication of whether these investments translate into meaningful market traction.

dialpad

Vendor
Dialpad

Quadrant
Mid-Market Challenger

Category
AI-Native CCaaS

Procurement Pathway
Contact Centre Platform-Led

Unified Communications and Contact Centre Simplicity

One of Dialpad's enduring strengths is its ability to deliver UCaaS and CCaaS capabilities from a single platform.

For SMB and mid-market organisations, this creates a simpler operating model with fewer vendors, fewer integrations and a more consistent user experience across collaboration and customer service functions. This simplicity remains one of Dialpad's strongest competitive advantages when compared with larger enterprise platforms that often require multiple products and implementation partners.

Enterprise Scale Remains the Key Question

Despite continued product maturity, Dialpad remains more commonly associated with SMB and mid-market deployments than large multinational enterprise environments.

While enterprise functionality continues to improve, buyers operating complex multi-country environments should carefully evaluate areas such as workforce engagement management, regulatory compliance, global telephony coverage and ecosystem maturity. Dialpad increasingly appears as a challenger on enterprise shortlists, but it has yet to demonstrate the scale of regional enterprise adoption achieved by market leaders such as Genesys, NICE and Cisco.

dialpad

Vendor
Dialpad

Quadrant
Mid-Market Challenger

Category
AI-Native CCaaS

Procurement Pathway
Contact Centre Platform-Led

12-Month Outlook

- Dialpad enters the next phase of growth with one of the clearest market positions in the CCaaS sector.

- Rather than competing as a traditional enterprise contact centre platform, Dialpad is positioning itself as an AI-native communications and customer engagement provider focused on simplicity, speed and embedded intelligence. This approach continues to resonate strongly with SMB and mid-market buyers seeking practical AI outcomes without significant implementation complexity.

- Over the next 12 months, we expect Dialpad to continue investing heavily in its Agentic AI Platform, no-code automation capabilities and workforce engagement functionality. Particular attention should be paid to the maturity of the Surfboard integration, growth in Japanese-language deployments and the company's ability to extend beyond its established ANZ customer base.

- The primary challenge will be scaling into larger enterprise opportunities without losing the simplicity that differentiates the platform today. Success will depend on strengthening partner channels, expanding regional presence and demonstrating more large-scale APAC enterprise reference customers.

- Dialpad remains one of the most credible AI-native challengers in the market and one of the strongest options for SMB and mid-market organisations pursuing AI-enabled customer experience transformation. While enterprise momentum is growing, its position today is best characterised as an emerging challenger rather than a direct competitor to the largest global CCaaS platforms.

Vendor
Genesys

Quadrant
Enterprise Transformer

Category
CCaaS Native

Procurement Pathway
Contact Centre Platform-Led

Leading with a Large Installed Base, A Challenger in AI Innovation

Against the 2025 Outlook

The 2025 outlook proved half right and half incomplete. Genesys did launch Agentic AI Studio and has maintained a commanding position across APAC. Cloud migration pathways are executing, and the partner ecosystem continues to activate. Infrastructure expansion is real with the late-2025 Singapore region addition and ongoing AWS region build-out are on track. North Asia (particularly Japan) remains strong.

Where the outlook under-weighted the story: the gap between "visionary innovation" and what enterprises will pay for. Agentic AI Studio's adoption is real, but customer feedback reveals a structural tension. Genesys' integration-first architecture, orchestrating calls to external AI services, creates cost transparency problems that hyperscaler alternatives don't have. Token-based AI pricing, flagged as a theoretical concern in 2025, is now a deal velocity issue.

The "operational maturity that enterprises demand" has become harder to monetise when customers can achieve similar outcomes more cheaply through Microsoft Teams or AWS Connect. The command position remains, but it's narrowing to specific customer cohorts rather than remaining universal across the market.

Key Findings

Cloud Migration story still holds strong in Asia Pacific

Genesys Cloud platform reached nearly $2.4 billion of annual recurring revenue during Q3 of fiscal year 2026, growing more than 30 per cent year-over-year. The region continues to be a growth engine, with enterprises actively migrating from on-premises Genesys Engage. Genesys Cloud ended the quarter with more than 500 customers with more than $1 million in ARR. This growth has been strong in the APAC region across Australia, Japan, Korea, and India where full cloud infrastructure availability supports large-scale deployments.

GENESYS

Vendor
Genesys

Quadrant
Enterprise Transformer

Category
CCaaS Native

Procurement Pathway
Contact Centre Platform-Led

Genesys Engage end-of-life (December 2028) creates a migration cliff and re-evaluation window

Genesys has forced a deliberate sunset of its legacy Engage platform by December 2028. This has accelerated migrations to Genesys Cloud, validating execution on the transition roadmap. However, not all migrations have resulted in long-term satisfaction. Some customers post-migration have encountered token-based AI pricing shock and platform complexity that didn't exist on-premises. On-Prem and Hybrid continues to be a key requirement in APAC, and as the December 2028 deadline approaches, existing Engage customers will enter re-evaluation cycles.

Massive Installed Base a Winner

Genesys has the largest installed base of any CCaaS vendor in APAC. They continue to win AI and automation deals across the region, including recent deployments at Beyond Bank, Cathay, Kiwibank, NSW Department of Communities and Justice, Tonik, and Western Sydney University. Other major customers include Prvidr, Woolworths (ANZ and NZ), and Charles Sturt University. The installed base translates into strong reference ability and customer stickiness for existing users. However, scale alone is no longer sufficient to win net-new deals in segments where architecture and cost-per-contact economics are the primary decision drivers.

Enterprise Grade Routing and Orchestration

Genesys' routing logic, queue management, journey orchestration, and enterprise telephony expertise remain best-in-class. Many startups and AI-native vendors underestimate how hard enterprise-grade routing actually is.

Genesys' depth in this area is a genuine moat against newer entrants. However, this strength is increasingly commoditised for customers building on hyperscaler infrastructure, where routing is table-stakes, not differentiation.

GENESYS

Vendor

Genesys

Quadrant

Enterprise Transformer

Category

CCaaS Native

Procurement Pathway

Contact Centre Platform-Led

AI: integration-first architecture, not model-first

The 2025 characterisation of Genesys AI as "bolted on" misses the deliberate architectural choice at play. Genesys has built an integration-first platform: their strength lies in orchestrating contacts to the right AI services, whether Genesys-hosted or external (AWS Bedrock, Google Vertex, OpenAI, Azure OpenAI). They excel at routing, context enrichment, agent copilot support, and wrap-up automation. This is a viable and defensible architecture for many enterprise use cases.

The trade-off is clear: enterprises that want to own the model layer - custom fine-tuning, proprietary data training, inference cost control - find themselves paying Genesys for routing and orchestration plus paying the hyperscaler for model consumption. This creates a structural cost disadvantage.

Recent wins (Charles Sturt University, ENGIE Australia and New Zealand, Western Sydney University) reflect this positioning: they're deploying agent copilots, intent detection, and conversational automation - the mid-tier AI use cases where Genesys' orchestration value is highest. When enterprises prioritise ownership of the model layer, custom LLM fine-tuning and direct control of inference costs, hyperscaler architectures continue to hold an advantage. Conversely, organisations prioritising governed orchestration across complex enterprise systems may find the Genesys approach increasingly compelling following the Pinkfish acquisition.

GENESYS

Vendor
Genesys

Quadrant
Enterprise Transformer

Category
CCaaS Native

Procurement Pathway
Contact Centre Platform-Led

From AI Orchestration to Enterprise Execution

The acquisition of Pinkfish in June 2026 materially strengthens Genesys' agentic AI strategy. Rather than competing on foundation models, Genesys has doubled down on orchestration by adding workflow automation and Model Context Protocol (MCP) capabilities that allow AI agents to securely execute work across enterprise applications. Pinkfish brings more than 500 integrations and 25,000 MCP-enabled tools spanning CRM, ERP, HR, billing, order management and other enterprise systems, allowing Genesys Cloud AI to move beyond conversation into governed execution.

Strategically, this reinforces Genesys' position as the orchestration layer sitting above enterprise systems rather than competing to own the AI model layer. For organisations wanting trusted AI that can coordinate work across multiple business applications while maintaining governance, this significantly strengthens the Genesys value proposition.

Competitive loss: Westpac NZ signals architectural trade-off

Westpac New Zealand's migration from Genesys to Microsoft (June 2026) provides the clearest evidence that the integration-first positioning has real competitive consequences. Westpac's decision wasn't driven by Genesys' routing capability or platform stability. They chose Teams/Azure integration to own their AI layer, leverage native Copilot, and avoid token-based consumption costs. This is a structural loss, not an execution failure. It signals that major financial services enterprises are willing to abandon installed Genesys infrastructure when architectural fit and economics diverge.

GENESYS

Vendor
Genesys

Quadrant
Enterprise Transformer

Category
CCaaS Native

Procurement Pathway
Contact Centre Platform-Led

12-Month Outlook

- Genesys enters the next 12 months with structural momentum and emerging vulnerabilities. Cloud migration execution is solid. The installed base is real. The partner ecosystem is scaled. But three competitive battles will determine whether Genesys remains a universal platform or becomes segmented:
    - AI pricing model shifts away from token-based consumption (now a deal-velocity issue, not a future problem);
    - the market bifurcation between integration-first (Genesys) and model-first (hyperscaler) architectures becoming visible in win/loss patterns;
    - and post-migration satisfaction from the Engage-to-Cloud transitions. By June 2027, most forced migrations will be complete, and the quality of those migrations will determine churn risk heading toward the December 2028 Engage EOL. If post-migration experience is clean, the cliff is a non-event. If it's rough, the 30-month window becomes a re-evaluation opportunity for competitors.
- The Pinkfish acquisition materially strengthens Genesys' competitive position in agentic AI. By early 2027, Genesys Cloud is expected to natively incorporate enterprise workflow orchestration, allowing AI agents to securely execute work across CRM, ERP, billing and other business systems. The strategic question will be whether this additional capability is sufficient to offset ongoing customer concerns around token-based AI pricing and the economics of integration-first architectures.
- For enterprises that want comprehensive, risk-averse platforms with world-class routing and strong partner support, Genesys remains unmatched. For enterprises building bespoke AI stacks or optimising for cost-transparent infrastructure, hyperscalers are winning decisively. Westpac NZ's loss to Microsoft exemplifies this split. The market is no longer competing on vendor capability alone, it's segmented by architectural philosophy and economics.
- Genesys' challenge is defending its core segment (large incumbents, risk-averse procurement, operational maturity requirements) while accepting that there is significant competition to win deals where customers want to own the AI layer. Agentic AI Studio's adoption will be watched, but the real competitive metric will be whether Genesys moves from token-based to AI-inclusive pricing by Q4 2026.

Google

Vendor

Google

Quadrant

Future Builder

Category

Hyperscaler / AI Platform

Procurement Pathway

Hyperscaler & AI Platform-Led

From AI Infrastructure to the Agentic Customer Experience Platform

Against the 2025 Outlook

The 2025 guide identified Google as a hyperscaler positioned to become increasingly influential across APAC customer experience. That assessment has largely played out, but the path has evolved. Rather than competing directly as a traditional contact centre platform, Google has moved significantly higher up the customer experience stack through the launch of Gemini Enterprise for Customer Experience (GECX).

This represents an important strategic shift. Google is no longer simply supplying foundation models or AI services consumed by other platforms. It is packaging customer service, commerce, conversational AI, voice, search and agent orchestration into an enterprise customer experience platform designed around agentic workflows.

Regional momentum is strongest across Australian retail, where organisations including Woolworths and Bunnings have become early reference customers. At the same time, Google's influence continues to extend well beyond its own deployments, with Gemini increasingly providing the intelligence layer inside many competing customer engagement platforms.

Key Findings

Gemini Enterprise for Customer Experience changes Google's market position

Google's most significant CX announcement in 2026 was Gemini Enterprise for Customer Experience. GECX combines conversational AI, multimodal voice, Customer Experience Agent Studio, agentic commerce, workflow orchestration and enterprise search into a packaged platform rather than requiring organisations to assemble these capabilities individually.

This fundamentally changes Google's procurement story. Rather than engaging primarily with cloud architects or infrastructure teams, Google is increasingly selling directly to customer experience, digital and AI executives. In retail particularly, GECX is now being evaluated alongside broader customer engagement platforms rather than simply as another AI service.

Google's ambition is becoming increasingly clear. Rather than competing feature-for-feature with mature CCaaS platforms, it is seeking to own the AI operating layer across the entire customer lifecycle.

Vendor
Google

Quadrant
Future Builder

Category
Hyperscaler / AI Platform

Procurement Pathway
Hyperscaler & AI Platform-Led

Full-stack ownership remains Google's core differentiator

Google remains unique in controlling almost every layer of its AI stack: Gemini models, custom Tensor Processing Units (TPUs), global infrastructure, cloud platform and enterprise AI services.

For organisations seeking a single strategic AI partner, this level of vertical integration offers advantages in performance, optimisation and speed of innovation. The counter argument remains equally valid. Many enterprises increasingly prefer multi-model strategies that avoid dependency on a single provider. Whether buyers value deep integration or maximum flexibility will become an increasingly important procurement decision over the next several years.

Agentic commerce is reshaping customer engagement

Retail has emerged as Google's strongest APAC proof point.

Rather than deploying traditional chatbots, organisations are implementing AI capable of maintaining customer context, recommending products, planning projects, orchestrating workflows and completing increasingly complex customer journeys across multiple channels.

This changes where buying decisions originate. Investment increasingly sits with customer experience, digital commerce and enterprise AI leaders rather than traditional contact centre executives. Organisations that continue viewing conversational AI purely as a contact centre initiative risk missing the broader enterprise transformation underway.

Google's influence extends beyond its own platform

Google's customer experience footprint remains significantly larger than its direct platform deployments suggest.

Across APAC, Gemini increasingly operates as the intelligence layer powering virtual assistants, AI search, knowledge retrieval and agent assistance inside incumbent CCaaS environments. For many organisations, selecting Google AI does not require replacing an existing contact centre platform.

This separation between AI strategy and platform strategy is becoming increasingly common as enterprises modernise customer experience incrementally rather than through wholesale platform replacement.

Vendor Assessments

Google

Vendor

Google

Quadrant

Future Builder

Category

Hyperscaler / AI Platform

Procurement Pathway

Hyperscaler & AI Platform-Led

Early deployments demonstrate both innovation and operational reality

Google's Australian reference customers also demonstrate the realities of deploying agentic AI at enterprise scale.

Woolworths' internal AI assistant Olive attracted significant public attention after unexpected conversational behaviour exposed weaknesses in governance, testing and prompt management. While the incident did not reflect limitations in the underlying Gemini technology, it reinforced an important lesson for enterprise buyers.

As AI agents become increasingly autonomous, governance, operational controls, testing frameworks and human oversight become as important as model capability itself. The organisations achieving the greatest success with agentic AI will likely be those investing equally in operating models and governance as they do in technology.

The APAC build-out continues to mature

Google has substantially expanded its customer experience capability across APAC, strengthening teams throughout Australia, India, Singapore, Korea, Japan and the Philippines while continuing to invest heavily in partner capability.

Although production references continue to grow, the region remains in an early adoption phase compared with North America. The strongest evidence of momentum currently sits within retail and digital commerce, with financial services emerging as the next likely area of expansion.

Google

Vendor

Google

Quadrant

Future Builder

Category

Hyperscaler / AI Platform

Procurement Pathway

Hyperscaler & AI Platform-Led

12-Month Outlook

- Expect Gemini Enterprise for Customer Experience to become Google's primary customer experience growth engine across APAC, particularly within retail, financial services and digital commerce.
- Multimodal voice and agent orchestration are likely to become Google's next major competitive focus as Gemini expands beyond digital channels into enterprise telephony and customer service.
- Google's greatest opportunity is not replacing established CCaaS vendors. It is becoming the AI operating layer sitting above existing customer engagement platforms, allowing enterprises to modernise customer experience without immediately replacing core infrastructure.
- The biggest watch item is governance. Google's technical capability is no longer the primary question. Enterprise adoption will increasingly depend on organisations' ability to operationalise autonomous AI safely, consistently and at scale.

Vendor Assessments

Microsoft

Vendor

Microsoft

Quadrant

Enterprise Transformer

Category

Hyperscaler & Business Applications Platform

Procurement Pathway

CRM & Service Platform-Led

Flexing the Hyperscaler Muscle: On the move with scale in AI, CRM and Contact Centres

Against the 2025 Outlook

The 2025 guide flagged Microsoft as a hyperscaler set to change the rules through scale and AI. That has begun to play out through platform gravity, the agentic CX agents and early Dynamics 365 contact centre wins. The prior view under-stated how much the win would come from owning the workflow and productivity layer rather than from competing on contact centre depth, where Microsoft is still maturing on enterprise-grade voice.

Key Findings

The Core Strength: Platform Gravity

Microsoft's biggest CCaaS weapon is not a standalone contact centre product. It's the depth of the Microsoft infrastructure already embedded within APAC enterprises. Teams, Azure, Dynamics 365, and Microsoft 365 Copilot are deeply entrenched across enterprises in Asia Pacific creating enormous switching cost advantages. Westpac New Zealand, for example, became one of the first banks globally to deploy Dynamics 365 CCaaS, citing the ability to get real-time customer profile data pulled into agent desktops via AI during live calls. Commonwealth Bank in Australia are another who have co-designed a new customer service experience. We can expect more announcements in 2026.

New Agentic CX Capabilities

Microsoft's recent rollout of purpose-built AI agents Customer Assist, Quality Assurance, and Service Operations marks a significant pivot in its Contact Center as a Service (CCaaS) strategy. Rather than just selling individual AI features or a standard telephony wrapper, Microsoft is building an interconnected ecosystem of agentic AI designed to manage the entire contact centre lifecycle, including the most recent launch of WEM capabilities at CCW in June.

Uniquely Positioned to Win the Workflow Battle

Microsoft has shifted the basis of competition in contact centre. The question is no longer about which CCaaS vendor has the best capabilities which spans omnichannel routing to migrating to the cloud. They want to own the workflow conversation that spans across CRM, business applications, back-office applications and the contact centre. This is how they are slowly winning deals in the market and when the Enterprise runs its entire infrastructure on Microsoft, the argument to go with Microsoft for CX and AI becomes a compelling value proposition for the C-Suite decision makers.

Microsoft

Vendor
Microsoft

Quadrant
Enterprise Transformer

Category
Hyperscaler & Business Applications Platform

Procurement Pathway
CRM & Service Platform-Led

Microsoft owns the Productivity Layer

Microsoft controls email, documents, collaboration tools, meetings, identity and workplace workflow. That itself creates massive AI advantages. Microsoft Power Platform allows enterprises to rapidly build workflows, automate CX processes, connect legacy systems, create AI-assisted apps and extend customer journeys without large coding teams. In Asia Pacific where many enterprises struggle with engineering talent shortages this matters enormously.

Partner Ecosystem Depth

Microsoft has one of the strongest enterprise partner ecosystems in APAC. The partner base is broad across Azure, Microsoft 365, Dynamics 365, Power Platform and systems integration, giving Microsoft a genuine advantage in transformation programs where CRM, workflow, data, identity and productivity need to be joined up.

The gap is contact centre specialisation. Many Microsoft partners are strong in CRM, low-code automation and enterprise integration, but lighter in the operational realities of CCaaS delivery: voice architecture, carrier management, SBC design, recording and compliance, routing design, WEM, migration sequencing and day-two contact centre optimisation.

This is changing. Microsoft is actively building the partner capability layer, including new skilling paths such as Dynamics 365 Contact Center AI Engineer Associate. That matters, but it also reinforces the point: the ecosystem is scaling into contact centre, not yet as deep as the established CCaaS specialist ecosystems.

05

Vendor Assessments

Vendor

Microsoft

Quadrant

Enterprise Transformer

Category

Hyperscaler & Business Applications Platform

Procurement Pathway

CRM & Service Platform-Led

12-Month Outlook

- Being a Hyperscaler in Asia Pacific, Microsoft will likely win in APAC where customers runs Teams and Dynamics 365 and want an AI contact centre without re-platforming. The Copilot-native experience for agents is genuinely compelling and operationally simpler to deploy for Microsoft shops.

- Microsoft is not competing to become the best CCaaS vendor. They want to be the agentic workflow orchestrator by enabling businesses to deploy their army of AI agents. These are agents that will be deeply embedded within business applications, CRM and workplace collaboration tools. As AI is part of their infrastructure, they will disrupt the traditional CCaaS market that see vendors selling point solutions.

- Traditional CCaaS vendors have spent decades perfecting features like global voice carrier redundancies, complex regulatory compliance in obscure jurisdictions, and deep, multi-tiered outbound dialling algorithms. Microsoft is still building up its maturity in highly advanced, hyper-regulated telecom routing. This will be stress tested as they scale in large Enterprise accounts. The hardest part of CCaaS is real-time voice at enterprise scale and some of these include voice reliability, SBC integration, complex routing, latency, recording and compliance, voice biometrics, fraud detection on the voice channel.

- Microsoft has announced plans at CCW in June to deepen native WEM (workforce planning, quality management, performance management, speech analytics) which addresses a gap in delivering to APAC requirements.

- Microsoft will pressure the Contact Centre market less through feature parity and more through workflow gravity, Copilot adoption and consumption-based AI. Buyers should separate the per-user contact centre licence from the Copilot Credit model used for AI agents, and model both as part of purchasing due diligence.

Vendor Assessments

Vendor

Mitel

Quadrant

Hybrid Stalwart

Category

UC & Hybrid Communications Platform

Procurement Pathway

Contact Centre Platform-Led

Hybrid Momentum is Mainly in Unified Communications and Voice

Against the 2025 Outlook

The 2025 outlook positioned Mitel as a potential modernisation partner capable of leveraging its hybrid architecture, installed base and AI investments to reignite growth across APAC. While the hybrid positioning remains relevant, the year unfolded more defensively than anticipated. Financial restructuring, the retirement of legacy cloud platforms and increasing competitive pressure on the installed base shifted the narrative from growth to retention.

Mitel remains strongest where regulatory, sovereignty and operational requirements make cloud-first strategies difficult. However, the company is still largely perceived as a Unified Communications and telephony provider rather than a leading contact centre or AI platform. The challenge is no longer proving it can support hybrid environments. It is proving that hybrid remains strategically relevant in an increasingly AI-driven customer experience market.

Key Findings

Installed Base Loyalty in Regulated Verticals

Mitel retains significant influence across healthcare, education, government, emergency services and critical infrastructure throughout ANZ and parts of Asia. These environments often carry decades of telephony investment, complex integrations and operational risk that make wholesale replacement difficult.

While competitors continue targeting migration opportunities, many customers remain cautious about moving voice, recording and customer interaction workloads entirely into public cloud environments. This provides Mitel with a valuable, though shrinking, defensive position.

Vendor
Mitel

Quadrant
Hybrid Stalwart

Category
UC & Hybrid Communications Platform

Procurement Pathway
Contact Centre Platform-Led

Sovereignty and Hybrid Remain the Strongest Differentiators

Mitel's most credible market position is not competing head-to-head with cloud-native CCaaS providers but providing a hybrid pathway that combines on-premises, private cloud and sovereign deployment options.

Many highly regulated organisations are increasingly interested in AI but remain uncertain about data residency, governance and regulatory obligations. Mitel has an opportunity to position itself as the vendor that bridges AI innovation and sovereign operational control.

The challenge is execution. Buyers increasingly expect AI-powered automation, agent assist, analytics and orchestration capabilities regardless of deployment model. Hybrid alone is no longer enough.

Contact Centre Remains Secondary to the Voice Story

Despite investments in customer experience capabilities, including launch of Mitel CX 2.0 in late 2025, their identity across much of APAC remains anchored in voice and UC.

Many enterprise buyers continue to evaluate Mitel as a telephony incumbent rather than a strategic CX platform. Competitors such as Genesys, NICE, Amazon Connect, Cisco, Zoom and Talkdesk are often entering conversations with stronger AI, automation and customer experience narratives.

To change perception, Mitel must demonstrate that its contact centre strategy is more than an extension of its telephony heritage, and move beyond the conservative AI capabilities launched to date.

Where Mitel is genuinely differentiated is the private and sovereign cloud delivery and the hybrid migration path, which matters for data-residency-constrained buyers and the 80% of the workforce that is not desk-based. The dependency to watch is the Genesys relationship: if the advanced experience orchestration is coming from Genesys, that tells you where Mitel judges its own AI ceiling to be.

Vendor
Mitel

Quadrant
Hybrid Stalwart

Category
UC & Hybrid Communications Platform

Procurement Pathway
Contact Centre Platform-Led

Post-Restructuring Stability Improves Buyer Confidence

The successful completion of Mitel's Chapter 11 restructuring removed a significant amount of debt and materially improved the company's financial position. Operationally, the process created less disruption than many customers feared and was largely managed without major channel or customer impacts.

For APAC buyers, the restructuring reduces concerns about viability while reinforcing a broader reality: Mitel is now operating as a focused, efficiency-driven business prioritising customer retention and profitability rather than aggressive market expansion.

The result is a more stable vendor, but not necessarily a faster-growing one.

Brand Visibility Requires APAC Investment

Outside Australia and New Zealand, Mitel continues to struggle for mindshare in CX and contact centre discussions.

The company remains underrepresented in analyst conversations, customer experience events and AI-focused market discussions. While competitors dominate discussions around agentic AI, automation and customer experience transformation, Mitel's messaging often remains centred on communications infrastructure.

Changing this perception will require sustained regional marketing, analyst engagement, customer advocacy and clearer positioning around AI-enabled customer experience outcomes.

Vendor
Mitel

Quadrant
Hybrid Stalwart

Category
UC & Hybrid Communications Platform

Procurement Pathway
Contact Centre Platform-Led

12-Month Outlook

- Mitel's strongest opportunity is to become the preferred modernisation path for organisations that cannot fully embrace public cloud. This position remains differentiated and defensible in government, healthcare, utilities, financial services and critical infrastructure.

- Defending the installed base must evolve beyond telephony renewals. Every renewal conversation should become a broader discussion around voice, contact centre, AI and customer experience transformation. If Mitel remains confined to infrastructure conversations, competitors will continue capturing higher-value CX workloads.

- The emergence of sovereign AI and private AI deployments may create an opportunity that favours Mitel's architecture. Organisations increasingly want AI capabilities while retaining control over data, security and governance. This aligns closely with Mitel's historic strengths.

- Channel execution will be critical. APAC remains heavily partner-led, particularly across Southeast Asia. Mitel's ability to motivate partners to lead with CX and AI, rather than simply maintain legacy voice estates, will heavily influence future growth.

- The greatest strategic risk is relevance. Mitel does not need to outspend the hyperscalers or cloud-native CCaaS vendors, but it does need to convince customers that hybrid architecture is a strategic advantage rather than a transitional state. If it succeeds, it can retain a valuable niche. If not, the installed base will continue to erode through successive renewal cycles.

NiCE

Vendor
NiCE (CXone)

Quadrant
Enterprise Transformer

Category
CCaaS & CX Platform

Procurement Pathway
Contact Centre Platform-Led

Building from an existing position of strength, Cognigy is their game changer in the AI arms race

Against the 2025 Outlook

The 2025 outlook anticipated that NiCE would strengthen its position through deeper AI integration within CXone, continued expansion across regulated industries, and growing momentum in ANZ and broader APAC. While those predictions largely proved accurate, the defining development was not organic platform evolution but strategic expansion through the acquisition of Cognigy.

Rather than simply embedding more AI into the contact centre stack, NiCE repositioned itself around enterprise-wide AI orchestration and agentic automation. The acquisition shifted the conversation from contact centre transformation to broader workflow automation, enabling NiCE to engage organisations running competing contact centre, CRM, and enterprise platforms. This significantly expanded its addressable market and altered its competitive posture.

The outlook correctly identified NiCE's continued strength in government, financial services, healthcare, and large enterprise environments, where trust, governance, and operational maturity remain critical buying criteria. However, it underestimated the speed at which the market narrative would move from AI-assisted agents to autonomous and agentic AI capabilities.

Overall, the leadership thesis held. What changed was the source of differentiation. In 2025, NiCE was viewed primarily as a leading CCaaS and workforce engagement vendor with strong AI capabilities.

By 2026, it is increasingly positioning itself as an AI and automation platform that happens to own one of the world's leading contact centre ecosystems.

NiCE

Vendor

NiCE (CXone)

Quadrant

Enterprise Transformer

Category

CCaaS & CX Platform

Procurement Pathway

Contact Centre Platform-Led

Key Findings

Australia is their strongest market in APAC by a clear margin.

The Services Australia deal puts them in the lead position in Australia. The Optus partnership has been productive. NiCE has invested heavily in local cloud presence and has good native sales coverage. Australia is also where NiCE most directly competes with Genesys, and it's roughly a coin-flip market. They also have a strong Singapore and ASEAN presence although not entirely in CCaaS but in its WEM, WFO, Compliance recording and Analytics portfolios. Japan has been mixed for NiCE. NiCE has presence through partners like NTT DATA, but Japan is heavily dominated by local players and the entry of new players including the Hyperscalers is growing. NiCE will need to win more partners over and sell the AI vision and localisation to win in the Japanese market.

The Workforce Engagement Management moat.

NiCE is a dominant WEM vendor globally and has been for over a decade. In APAC, where many large contact centres run NICE WFM/WEM regardless of their CCaaS choice, this gives them a foothold to expand into adjacent CXone deals over time. Many of their APAC contact centre wins started as WEM relationships.

An AI-led, platform-agnostic go-to-market is replacing the CCaaS-first pitch

Briefings conducted for this guide indicate NiCE’s APAC motion has been restructured around AI rather than CXone. Cognigy now carries its own specialist sales overlay and is being positioned into competitor installed bases, including accounts running other vendors’ CCaaS, rather than only as a CXone feature. The channel is shifting with it: global consulting firms and large regional integrators have been recruited for delivery, boutique AI specialists are being added, and parts of the traditional CCaaS partner base are struggling to carry the agentic AI conversation. A parallel signal is structural change in the BPO sector, with global BPOs moving into reseller roles around the NiCE and Cognigy proposition. The strategic ambition signalled goes beyond the contact centre toward enterprise software more broadly, consistent with the front-office-and-back-office positioning noted in the outlook.

NiCE

Vendor

NiCE (CXone)

Quadrant

Enterprise Transformer

Category

CCaaS & CX Platform

Procurement Pathway

Contact Centre Platform-Led

Outside ANZ, the strategy is Cognigy-first, not CXone-first

CXone's regional infrastructure footprint constrains the platform play in ASEAN and India, where the absence of in-region data centres has cost deals against locally hosted competitors. The response is to lead with Cognigy and voice AI rather than contest CCaaS head-on, with WEM, WFO and analytics continuing to carry the established business in those markets. In Japan, the same logic produces an overlay strategy: rather than displacing entrenched on-premises incumbents with strong partner loyalty, NiCE is positioning Cognigy on top of those installed bases while it builds mid-market CCaaS presence. This is a pragmatic reading of where NiCE can and cannot win in the near term, and buyers outside ANZ should evaluate NiCE's AI capability and its CCaaS platform as separate propositions with different regional maturity.

It is no longer about the NiCE installed base.

NiCE is tightly integrating Cognigy into CXone for its installed base, while continuing to sell Cognigy independently to enterprises running platforms such as Genesys, Avaya and others. This is where the big multiplier effect will come for NiCE. The solution is the "brain" that can sit on top of multiple CCaaS platforms that lack an AI Native solution. Cognigy was already embedded with vendors like Genesys, Avaya and many more in the past. These deployments are real and are seeing good outcomes. The conversation will get stronger and increase upsell opportunities for NiCE because it now controls the orchestration layer inside competing CX platforms.

NiCE

Vendor
NiCE (CXone)

Quadrant
Enterprise Transformer

Category
CCaaS & CX Platform

Procurement Pathway
Contact Centre Platform-Led

12-Month Outlook

- NiCE keeps emphasising "front office and back office". Announcements from NiCE World in early June point to the implicit ambition with a Workforce Empowerment Suite to take contact-centre-grade workflow automation and apply it to refunds, claims processing, loan documentation and approvals, fraud investigation, case management and anywhere structured human work happens in regulated industries. They already touch most of these processes through Actimize and Enlighten. If they execute on that expansion, NiCE stops being "a contact centre company" and becomes "a regulated-workflow company" a much larger market with much less competition.

- Most enterprises deploying AI agents don't yet know how to operate them across compliance, quality, manage versions, monitor for AI hallucinations and when the solution is not engaging well with the customer. The newly announced Agentic Engagement Pane is positioned to be the control plane for that, and they can sell it even to customers who use someone else's AI agents underneath. That's potentially a bigger TAM than the CCaaS market itself.

- They will have a massive installed base to go after. NiCE is tightly integrating Cognigy into CXone for its installed base, while continuing to sell Cognigy independently to enterprises running platforms such as Genesys, Verint, and Cisco.

- They have an opportunity to outdo their competitors in pricing. NiCE has the data assets (historical data on interaction analytics) to price by outcome credibly. If they're the first to commit to outcome-based pricing at scale, it could be a real differentiator.

- The market is watching the growing investment in partnerships in APAC, with a new ANZ Head of GSI, and a partner program that scales beyond traditional partners to AI-specialist partners.

- They are challenging the AI-native overlays. By embedding Cognigy deeply into CXone, NiCE is explicitly challenging the model where AI-native vendors sit above or beside CCaaS as orchestration/agent layers; it is saying the most performant, lowest-latency, and most controllable approach is to keep that stack in one platform. For enterprises that prefer single-throat-to-choke vendors, this is compelling and could blunt some AI-native competitive inroads.

05

Vendor Assessments

RingCentral

Vendor

RingCentral (RingCX)

Quadrant

Mid-Market Challenger

Category

UCaaS & CCaaS Platform

Procurement Pathway

Contact Centre Platform-Led

UCaaS Leader Riding a Contested Migration Wave into the Contact Centre

Against the 2025 Outlook

In 2026 RingCentral is a UCaaS leader extending into the contact centre through RingCX, its native, AI-first CCaaS platform launched in Australia in 2024. In APAC it is strongest as a unified communications play in the mid-market, with RingCX the growth vector rather than the established business. Its near-term opportunity is tied heavily to the forced migration of legacy on-premises UC and contact centre estates.

Key Findings

RingCX is AI-first but mid-market in scope

RingCX is built around the RingSense AI platform, providing real-time agent and supervisor assist, AI coaching and quality management, conversational analytics across more than 20 digital channels, and a bring-your-own intelligent virtual agent framework. It deploys quickly and prices disruptively, which suits mid-market buyers. It is not yet positioned for the largest, most complex enterprise contact centres, where routing depth, workforce engagement and regulated-voice requirements favour the established platform vendors.

The Mitel migration tailwind is real but no longer exclusive

RingCentral has held a Mitel migration partnership since 2021 and gains a head start as Mitel's legacy cloud platform reaches end of life in mid-2026, forcing customers to move. That arrangement is no longer exclusive, and Genesys, NiCE, Cisco and 8x8 are all contesting the same displaced base. The migration pipeline is a genuine APAC opportunity, particularly in UC, but the contact centre share of it is far from guaranteed.

UC heritage is the wedge, not contact centre depth

RingCentral's strength in APAC is the unified communications relationship and the increasingly common buyer preference to treat telephony and CCaaS as one decision. Where an enterprise standardises on RingCentral for UC, RingCX becomes a natural add-on. Where the contact centre is the primary requirement, RingCentral competes from behind the specialist platforms.

Channel and regional footprint

RingCentral operates across more than 100 countries on a partner-led model, and in APAC leans on resellers and master agents, particularly in ANZ. Partner depth and in-region delivery capacity outside ANZ are the watch areas, consistent with this guide's caution on single-market vendors extending across the region.

RingCentral

Vendor

RingCentral (RingCX)

Quadrant

Mid-Market Challenger

Category

UCaaS & CCaaS Platform

Procurement Pathway

Contact Centre Platform-Led

12-Month Outlook

- RingCentral AIR Pro launched in June 2026 to embed native agentic AI into RingCX, handling inbound and outbound, autonomous event-triggered outreach, and handoffs carrying full history, with a natural-language workflow builder. The market impact will focus on whether they see this as a UCaaS player pushing the "AI-native" line into the contact centre, or assess on its own merits.
- RingCX's APAC trajectory through 2026 will be shaped by how much of the Mitel and broader legacy-migration wave it converts to contact centre seats rather than UC-only moves, and whether RingSense keeps pace with rivals moving from agent assist toward autonomous agentic AI. Expect continued rapid feature delivery and aggressive bundled pricing. The realistic position is a credible mid-market unified-platform contender with a migration tailwind, rather than an enterprise CCaaS leader in the region.

Vendor

Salesforce (Agentforce / Service Cloud)

Quadrant

Future Builder

Category

CRM & Experience Platform

Procurement Pathway

CRM & Service Platform-Led

A New Entrant in the Asia Pacific Contact Centre and AI market | Key Findings

The entry of a CRM Giant will change the game in CCaaS

On 10 March 2026, Salesforce formally launched Agentforce Contact Center at Enterprise Connect, marking a significant strategic shift. After previously stating it did not intend to become a contact centre platform provider, Salesforce has now developed a native CCaaS platform, moving from partner to competitor with vendors including Genesys, NICE, Five9 and Amazon Connect.

Initial general availability is currently limited to the United States and Canada, with broader international rollout expected over the next 12 months. For APAC organisations, Agentforce Contact Center should currently be viewed as an emerging platform rather than a mature regional deployment.

Salesforce is betting that AI works best when CRM and customer engagement become one platform

Rather than positioning Agentforce purely as another CCaaS platform, Salesforce is making a broader architectural argument.

Its view is that AI agents perform best when customer data, workflow, knowledge, automation and engagement all operate within the same platform. Separating CRM and contact centre systems introduces latency, duplicated context and additional integration complexity that limits autonomous AI.

This proposition is particularly relevant across APAC, where organisations commonly manage multilingual, omnichannel customer journeys across multiple countries and business units.

Massive installed CRM base creates a compelling expansion opportunity

Salesforce continues to hold approximately 20.7% of the global CRM market and maintains a significant installed base across banking, financial services, telecommunications, retail, travel and airlines throughout Asia Pacific.

For existing Service Cloud customers, the ability to extend into customer engagement without introducing another major platform may significantly reduce implementation effort and integration complexity.

Vendor Assessments

Vendor

Salesforce (Agentforce / Service Cloud)

Quadrant

Future Builder

Category

CRM & Experience Platform

Procurement Pathway

CRM & Service Platform-Led

AI outcomes are increasingly becoming the commercial model

Salesforce continues to evolve beyond traditional seat-based licensing with the introduction of Agentforce Help Agent, an autonomous digital service agent designed to resolve customer enquiries across voice and digital channels.

A notable innovation is Salesforce's Pay-per-Resolution commercial model, where organisations only pay when Help Agent successfully resolves an interaction without human intervention. If the customer requests escalation or provides negative feedback, no charge is incurred and the complete interaction context is transferred to a human agent.

This represents one of the industry's first large-scale attempts to align AI commercial models directly with business outcomes rather than technology consumption.

However, buyers should carefully evaluate how "resolution" is defined, measured and audited. Resolution can vary significantly between organisations, channels and interaction types, making commercial governance and performance measurement an important consideration during procurement.

Workforce Engagement Management closes an early capability gap

Announced in June 2026, Agentforce Workforce Engagement Management extends Salesforce into forecasting, scheduling, coaching and AI performance management through a unified Service Command Center.

By combining workforce management, AI agent performance and human workforce metrics within the Salesforce platform, organisations can reduce integration overhead while managing both digital and human workforces through a common operating model.

Strong regional investment supports long-term commitment

Japan, Australia and Singapore remain Salesforce's largest APAC markets.

In March 2025 Salesforce announced a USD1 billion investment in Singapore to expand Agentforce AI capabilities and establish the country as a regional AI research and development hub through collaboration with Singapore Airlines. Additional investment has also been directed towards AI capability development in the Philippines.

Vendor

Salesforce (Agentforce / Service Cloud)

Quadrant

Future Builder

Category

CRM & Experience Platform

Procurement Pathway

CRM & Service Platform-Led

12-Month Outlook

- Australia, Japan and Singapore are expected to become the first APAC markets to receive general availability for Agentforce Voice and Agentforce Contact Centre, most likely through late 2026 and early 2027. Australia is the most likely initial market given Salesforce's established presence, language alignment and regulatory maturity.

- Existing Salesforce customers will drive early adoption. Mid-market organisations already invested in Service Cloud are likely to move first, while larger enterprises will focus on pilots and targeted use cases before considering broader platform consolidation.

- The addition of Agentforce Workforce Engagement Management substantially strengthens Salesforce's workforce optimisation proposition, addressing one of the more obvious capability gaps at launch.

- Agentforce Help Agent and outcome-based pricing have the potential to influence broader industry pricing models. Competitors are likely to face increasing pressure to demonstrate measurable business outcomes rather than simply offering AI features.

- Voice remains the area buyers should evaluate most closely. Delivering enterprise-grade voice requires carrier integration, telephony resilience, number provisioning, SBC interoperability and operational maturity. As APAC deployments expand, buyers should seek evidence of production-scale voice implementations alongside customer references within the region.

servicenow.

Vendor
ServiceNow

Quadrant
Future Builder

Category
Service Management Platform

Procurement Pathway
CRM & Service Platform-Led

A Heavyweight in Workflow Battling for CX and AI Dominance | Key Findings

Leveraging workflow DNA

ServiceNow's natural advantage is that it already orchestrates back-office work. ServiceNow also ties its strategy to a broader "control tower" concept: a governed layer that can orchestrate work across clouds, models, and enterprise data sources. The bet is that enterprises with messy fulfillment processes which include telcos and financial services, will value execution over engagement features.

The CCaaS Strategy — Partner, Don't Build

ServiceNow has made a deliberate choice not to become a CCaaS vendor. Instead, it's positioning itself as the workflow layer that CCaaS platforms plug into.

For voice, customers can call directly from a browser or mobile app to reach an AI Voice agent for self-service, no contact centre platform required. If calls originate from a CCaaS-provisioned phone number, they can be forwarded to AI Voice agents through supported integrations with Vonage, Genesys, NICE, Amazon Connect, Cisco Webex, and Zoom.

Voice AI - Promising but Still Early Days

ServiceNow's Voice AI story is genuinely new and has some serious technical underpinnings, but it's not yet mature. AI Voice Agents became GA in late 2025, it currently supports English, German, Spanish, and French with additional Asian languages coming.

Workflows that reach Backend Operations is a Game Changer

ServiceNow promises a more data-rich CRM experience, building workflows out to back-office systems to bolster customer profiles and that is big in the contact centre world. Its biggest differentiator is not in its front-office capabilities. Instead, it's in being able to unify multiple back-end workflows. In doing so, ServiceNow connects "behind-the-scenes" processes, unlocks operational insights, and enables a richer CRM experience.

servicenow

Vendor
ServiceNow

Quadrant
Future Builder

Category
Service Management Platform

Procurement Pathway
CRM & Service Platform-Led

12-Month Outlook

- No real telephony. ServiceNow has chosen to depend on CCaaS partners, which means they don't own the customer relationship at the contact centre layer. If Genesys or NiCE decide to compete with Autonomous CRM via their own agentic CX plays, ServiceNow is exposed.
- Voice AI is promising but immature. The architecture (Whisper, Cartesia, agentic orchestration) is modern, but the operational depth, language coverage, and CCaaS breadth need another 18–24 months to be enterprise-grade globally.
- ServiceNow is making one of the boldest enterprise software bets of the decade — attempting to redefine CRM itself rather than compete head-on with Salesforce on its own turf. At Knowledge 2026 they launched Autonomous CRM, ServiceNow Otto (a multimodal interface), and a revamped AI Control Tower. For ServiceNow legacy CRM systems track sales activities and service interactions but don't fulfill customer requests they're systems of record, not systems of execution. ServiceNow want to re-invent that by understanding how different departments work and how workflows will define a new standard for CRM.
- NiCE just announced a partnership with ServiceNow. The joint offering brings together NiCE's CXone platform with ServiceNow Customer Service Management (CSM) and workflow capabilities, aligning real-time customer intent with automated fulfillment across systems. They also have a strategic relationship with Genesys and Cisco and much of the success so far is in the ANZ region. We expect greater momentum with NiCE in the next 12 months given the scale of NiCE's accounts in ANZ.
- To really become a CX and AI heavyweight, ServiceNow likely need to buy an incumbent CCaaS market leader and own the native customer voice relationship at the contact centre layer.

05

Vendor Assessments

Vendor
Sprinklr

Quadrant
Future Builder

Category
Unified CX Platform

Procurement Pathway
CRM & Service Platform-Led

Unified-CXM and Intelligence Play, Contact Centre Still Maturing

Against the 2025 Outlook

Sprinklr remains one of the most difficult vendors in the market to categorise. While formally a Unified-CXM platform rather than a pure contact centre provider, it now appears across more analyst categories than almost any vendor in the customer experience ecosystem.

The 2025 guide identified Sprinklr as a vendor to watch for organisations seeking to consolidate customer experience, marketing, social engagement and insight. That assessment has strengthened. Across APAC, Sprinklr has continued to secure strategic enterprise wins, particularly where organisations are pursuing operating model simplification, centralised customer intelligence and AI-led transformation.

The market, however, remains uneven in its readiness for the Sprinklr proposition. Many buyers continue to procure point solutions for contact centres, Voice of the Customer, social listening or digital engagement independently. Sprinklr's value emerges when those domains are unified, meaning its strongest opportunities sit with large enterprises capable of adopting a shared customer data and operating model rather than a collection of disconnected tools.

Vendor
Sprinklr

Quadrant
Future Builder

Category
Unified CX Platform

Procurement Pathway
CRM & Service Platform-Led

Key Findings

The single data model remains the core differentiator

Sprinklr's proposition is fundamentally about unification. The platform brings together social listening, digital engagement, customer service, Voice of the Customer, marketing, conversational AI and contact centre operations onto a single underlying data model. Unlike many competitors that integrate acquired products, Sprinklr continues to position itself around a native architecture designed to connect customer signals, operational workflows and AI decision-making across functions.

The challenge is that organisational structures rarely mirror the technology vision. Success depends as much on internal alignment between marketing, service, digital and customer teams as it does on platform capability.

Voice of the Customer disruption is emerging

Sprinklr increasingly finds itself competing against Voice of the Customer specialists rather than contact centre vendors.

Medallia and Qualtrics remain deeply embedded across many enterprises, but both operate from a model heavily weighted toward solicited feedback, surveys and text-based insights. Sprinklr's focus on unstructured data, including social, digital, conversational and video signals, creates a different view of customer behaviour.

The company argues that most customer intelligence exists outside traditional survey programs. As organisations seek broader visibility across unsolicited customer signals, the distinction between Voice of the Customer, social listening and customer intelligence platforms is beginning to disappear.

Vendor
Sprinklr

Quadrant
Future Builder

Category
Unified CX Platform

Procurement Pathway
CRM & Service Platform-Led

Contact centre is part of the strategy, not the destination

Sprinklr's contact centre offering continues to improve, but viewing the platform primarily as a CCaaS competitor misses the broader strategic intent.

The company is increasingly positioning service operations as one component of a wider customer intelligence ecosystem. Voice, chat, messaging, social engagement, workforce management, automated quality assurance and AI agents are valuable because they generate customer signals and create opportunities for action.

For organisations seeking enterprise-grade voice, highly complex routing, carrier integration or large-scale regulated recording environments, specialist contact centre platforms still hold advantages. However, organisations prioritising unified customer engagement across digital, social and service channels will find Sprinklr's value proposition considerably stronger than a pure feature-by-feature CCaaS comparison suggests.

The next battleground is multimodal customer intelligence

The acquisition of ViralMoment in 2026 highlights where Sprinklr sees the market heading.

Traditional Voice of the Customer and social listening programs were built around text. Yet customer feedback increasingly appears in video, images and creator-generated content across platforms such as TikTok, Instagram and YouTube.

ViralMoment extends Sprinklr's ability to analyse video, audio, imagery and on-screen text simultaneously, creating a genuinely multimodal intelligence capability. The strategic importance is not simply content moderation or social monitoring. It is the ability to identify customer sentiment, emerging issues, behavioural trends and brand risk from formats that conventional listening tools largely ignore.

This becomes particularly important as AI-generated content, deepfakes and synthetic media create new challenges around trust, fraud detection and brand management.

The result is a stronger intelligence platform that extends well beyond traditional contact centre operations.

Vendor
Sprinklr

Quadrant
Future Builder

Category
Unified CX Platform

Procurement Pathway
CRM & Service Platform-Led

APAC strength sits in large enterprise transformation

Sprinklr's strongest APAC momentum is in large enterprises rather than the mid-market.

The platform is most effective for organisations consolidating fragmented customer operations, standardising technology platforms, building Global Capability Centres (GCCs), or centralising customer intelligence. It is particularly well suited to sectors such as airlines, financial services, automotive, luxury retail and consumer electronics.

Organisations such as Samsung have used Sprinklr to bring voice, digital and social teams into a single operating environment, improving both efficiency and customer outcomes.

India remains a major growth market, driven by large-scale digital transformation and GCC expansion. Japan is a more challenging market, where established local providers and strong domestic ecosystems, particularly NTT, create significant barriers to displacement.

Partner maturity remains the Achilles heel

The largest execution risk is not technology. Sprinklr's success depends on partners, sellers and solution consultants being able to articulate a sophisticated cross-functional transformation story. The platform spans customer service, marketing, social, AI, analytics and customer intelligence, making it inherently more complex to position than a standalone contact centre or VoC product.

Historically, the partner ecosystem has been less mature than competitors, limiting scale and consistency across markets. While the company has increased its focus on partner-led growth and strategic integrators, the challenge remains particularly visible when organisations attempt to move beyond individual use cases toward enterprise-wide adoption.

sprinklr

Vendor

Sprinklr

Quadrant

Future Builder

Category

Unified CX Platform

Procurement Pathway

CRM & Service Platform-Led

12-Month Outlook

- Over the next twelve months, Sprinklr's success will depend less on contact centre feature development and more on whether enterprises embrace the broader unification narrative.
- Three themes are worth watching.
    - First, whether multimodal intelligence becomes a mainstream enterprise requirement rather than an emerging capability. If video, image and AI-generated content analysis become essential components of customer intelligence programs, Sprinklr's position strengthens considerably.
    - Second, whether organisations begin consolidating Voice of the Customer, social listening and customer intelligence functions into unified platforms. This represents one of the most significant expansion opportunities for Sprinklr and could place increasing pressure on specialist VoC providers.
    - Third, whether the company can scale through partners and system integrators. The platform's value is greatest when deployed broadly across customer-facing functions, but that requires implementation expertise, organisational change capability and executive sponsorship that cannot be delivered through direct sales alone.
- The likely outcome is that Sprinklr continues to strengthen its position as a Unified-CXM and customer intelligence leader, particularly among large enterprises pursuing AI, customer data consolidation and operating model transformation.

05

Vendor Assessments

talkdesk

Vendor
Talkdesk

Quadrant
Future Builder

Category
CCaaS Native

Procurement Pathway
Contact Centre Platform-Led

Deep Agentic AI, Regional Momentum the Open Question

Against the 2025 Outlook

The 2025 outlook suggested Talkdesk had the ingredients for a regional resurgence through AI innovation, vertical solutions and renewed regional focus. While the product story has strengthened, particularly through continued investment in agentic AI and industry-specific capabilities, and Talkdesk returned to the Leaders quadrant of the Gartner CCaaS Magic Quadrant after a two-year absence, the regional growth thesis has weakened. The distinction matters. Global product and analyst standing is not the problem. APAC execution is.

The shift toward a predominantly partner-led go-to-market model is on the public record. In April 2026 Talkdesk signed SaaS distributor Unfold as one of its first Australian vendors, covering onboarding, pricing, quoting and deal support. Channel feedback gathered for this guide further points to changes in the APAC sales organisation and reduced direct presence, at a time when several competitors have increased regional investment. The first is documented. The second is a single-source signal, treated as such below.

The result has been slower-than-expected momentum, with partner recruitment and enablement taking longer to translate into measurable pipeline and customer growth. The platform remains competitive. The challenge is no longer product capability but the speed and effectiveness of regional execution. Talkdesk's own leadership has named adoption and customer ROI, not feature expansion, as its 2026 priority, which is the vendor confirming the same diagnosis.

talkdesk

Vendor

Talkdesk

Quadrant

Future Builder

Category

CCaaS Native

Procurement Pathway

Contact Centre Platform-Led

Key Findings

A deep, genuinely agentic AI stack

Talkdesk's customer experience automation platform spans Autopilot autonomous virtual agents across voice, chat, SMS and email, Copilot real-time agent assist, Navigator natural-language routing and, from early 2026, Automation Flows for no and low-code orchestration of AI agents across third-party systems. A bring-your-own voice AI capability over SIP is now generally available. In June 2026, the addition of Agent Builder will further strengthen their proposition as on product capability, Talkdesk competes at the front of the specialist field.

APAC investment on the public record

Talkdesk launched an Australia regional cloud in early 2025 to meet local data residency requirements, and has stated dedicated teams across Australia, Singapore, the Philippines, China, Thailand, Korea and India, citing strong regional growth and regulated-industry suitability. Taken at face value, this is a serious APAC commitment with sovereignty credentials relevant to banking, retail and healthcare buyers.

The momentum question

Approach to market in APAC has shifted, with direct sales and account teams replaced by a partner-led approach. The challenge for Talkdesk is building the maturity of their partner model when competing against existing, deep partner models run by competitors in market. This could slow momentum right when their product offering is arguably one of the stronger in region.

Vendor stability is a fair question.

Talkdesk was last valued at $10 billion in August 2021 and has not raised primary capital since, with headcount around 1,300 to 1,370 in early 2026, following multiple rounds of cost reduction across 2022 and 2023. A long-rumoured IPO has not eventuated. None of this is disqualifying for a founder-led private company managing to profitability, but a five-year-old valuation and a sustained cost-discipline posture belong in the risk calculus for any multi-year commitment, particularly one locked to a three-year term. Ask directly about local support continuity and roadmap funding.

Vendor
Talkdesk

Quadrant
Future Builder

Category
CCaaS Native

Procurement Pathway
Contact Centre Platform-Led

12-Month Outlook

- The next year will be critical for Talkdesk's APAC strategy. The success or failure of the partner-led model should become clearer as newly recruited partners move from onboarding to active market engagement.
- Product capability is unlikely to be the limiting factor. Market coverage, partner enablement and execution capacity will be. Expect Talkdesk to continue investing heavily in AI and industry solutions, particularly in sectors such as financial services, healthcare and travel.
- However, unless the partner ecosystem scales more rapidly and begins generating consistent regional momentum, Talkdesk risks ceding further ground to competitors with larger direct sales and delivery footprints. The opportunity remains significant, but the pace of execution will determine whether Talkdesk re-establishes growth or remains a niche challenger in the APAC market.

Vendor

Twilio

Quadrant

Future Builder

Category

CPaaS

Procurement Pathway

Developer & API-Led

The Infrastructure That Powers APAC's Customer Experience

Against the 2025 Outlook

The 2025 outlook positioned Twilio as voice-AI infrastructure rather than a contact centre platform, and that thesis has strengthened materially. The voice-revenue inflection and the move up the stack into conversation infrastructure confirm the direction the prior view anticipated. What remains unchanged is the gap the prior view also noted: APAC enterprise field presence and packaged simplicity still trail the infrastructure strength.

Key Findings

The Voice AI Infrastructure Positioning

Twilio occupies an unusual position in the contact centre and Voice AI conversation. They're not really a CCaaS vendor in the traditional sense although they have Flex. They're the plumbing layer underneath the Voice AI revolution. To understand why they'll become more important, as AI adoption grows in the contact centre, you must look at what every voice AI vendor needs: phone numbers, carrier connectivity, real-time audio streaming, regulatory compliance, reducing latency and the ability to hand off cleanly to a human. Without these, the Voice AI deployment could run into challenges and degrading voice quality. Twilio is winning that game to resolve these challenges for enterprises.

Their numbers are telling a story about a new Twilio

Twilio's Q1 2026 results showed what's happening. "Voice AI hits a milestone. Twilio's voice revenue grew 20% year over year in Q1 2026 — its highest growth rate in 19 quarters as AI-driven use cases move from pilot to production across customer service, contact centres and sales." Total revenue was $1.407 billion, up 20% year over year, its fastest organic growth rate since 2022. Six consecutive quarters of 20% voice revenue growth, net revenue retention at 114%, multi-product adoption up 29%. That's a real inflection. Voice was supposed to be the legacy, declining part of the Twilio business as everything moved to messaging. Instead, voice is the fastest-growing part again — because every AI agent that wants to make a phone call is buying Twilio voice minutes underneath.

Vendor
Twilio

Quadrant
Future Builder

Category
CPaaS

Procurement Pathway
Developer & API-Led

Moving up the AI stack slowly

In May 2026, Twilio made its most important strategic move in years. They released Conversation Memory, Conversation Orchestrator, Conversation Intelligence, and Agent Connect combine to turn disparate interactions into conversations across humans, agents, and systems. This is Twilio explicitly moving up the stack. Not just being the pipes anymore but by being the conversation infrastructure layer.

Strong in infrastructure, light in packaged CX

Twilio's position is the layer beneath the contact centre rather than the contact centre itself. Their Conversation products and conversation suite are LLM-agnostic by design, letting enterprises bring and swap their own models, which suits sophisticated buyers building custom voice AI. The trade-off is that Flex is a build-your-own platform: it rewards strong internal engineering and offers less packaged simplicity than the turnkey CCaaS vendors. For most APAC buyers the practical question is build versus buy, and Twilio is the strongest option only where the organisation genuinely wants to build.

Vendor

Twilio

Quadrant

Future Builder

Category

CPaaS

Procurement Pathway

Developer & API-Led

12-Month Outlook

- If Twilio plays it right, they don't need to win contact centre seats. They need to become invisible and unavoidable, the dial tone of voice AI. They have the carrier relationships, the developer ecosystem, the AI-neutral positioning, and products to do it.

- The developer story is not reaching buyers, and Twilio’s developer community trust is the structural advantage that no competitor can replicate. Twilio needs to translate the developer story into a business-outcome narrative: what does developer-first architecture mean for time-to-value, flexibility, and total cost? That translation is currently absent from Twilio’s APAC market presence.

- The outlook for Twilio is to focus the message on ‘building on our infrastructure.’ Build, Don’t Deploy as APAC’s fastest-growing enterprises are building their CX, not deploying it. Airlines building super-apps. Fintechs building collections flows. BPOs building multi-client automation platforms. Twilio is the infrastructure they build on.

- If Twilio want to scale, they need to nurture and grow their partner model. This is the single biggest gap for Twilio in APAC. Twilio needs to nurture relationships with joint pipeline, co-investment, and named delivery capability.

- Twilio is trusted by 300,000+ companies for voice, messaging, and authentication before AI became the market conversation. That trust is critical to the sales and partner conversations over the coming 12 months in APAC.

Vendor
Verint

Quadrant
Enterprise Transformer

Category
Open CCaaS & CX Automation

Procurement Pathway
Contact Centre Platform-Led

AI-Native CX Automation Layer remains their Competitive Advantage

Against the 2025 Outlook

The 2025 outlook positioned Verint as one of the strongest beneficiaries of enterprise demand for AI-native workforce optimisation and customer experience automation, particularly in organisations unwilling to replace their existing contact centre platforms. That thesis has largely proven correct.

What has become clearer through 2026 is that Verint's competitive position is no longer defined by contact centre infrastructure. Instead, it is increasingly operating as an intelligence, automation and workforce optimisation layer that sits across heterogeneous environments. In a region where many organisations continue to run mixed estates spanning Avaya, Cisco, Genesys, Amazon Connect, Microsoft and proprietary platforms, that neutrality remains a significant advantage.

The market context has also shifted. The acquisition by Thoma Bravo and subsequent consolidation have heightened scrutiny around long-term platform strategy, while the rapid acceleration of agentic AI has intensified competition from vendors seeking to embed workforce optimisation, coaching, knowledge and automation directly into their own ecosystems.

Despite these changes, Verint remains one of the few vendors in APAC able to demonstrate meaningful scale across workforce management, quality, analytics, knowledge, AI bots and customer engagement automation without requiring customers to standardise on a single contact centre platform.

Vendor

Verint

Quadrant

Enterprise Transformer

Category

Open CCaaS & CX Automation

Procurement Pathway

Contact Centre Platform-Led

Key Findings

The Open Overlay Strategy Has Become More Relevant, Not Less

Most major CX vendors continue to pursue platform consolidation strategies designed to increase customer dependency on a single ecosystem.

Verint has taken the opposite approach.

Its proposition is based on augmenting existing technology investments rather than replacing them, allowing organisations to introduce workforce optimisation, AI automation, analytics and knowledge capabilities across multiple platforms simultaneously.

For many APAC organisations, particularly those operating across multiple countries, business units or acquired entities, this approach aligns more closely with operational reality than the single-vendor vision promoted by much of the market.

Workforce Management Remains a Core Strength

While much of the industry conversation focuses on generative AI and agentic automation, workforce management remains one of Verint's most defensible assets.

Across Australia, Singapore, Hong Kong and India, Verint continues to maintain one of the strongest workforce optimisation footprints in the market.

Many organisations that have changed contact centre platforms over the past decade have retained Verint or Calabrio WFM, quality management or analytics components, reinforcing the strength of the standalone proposition.

This installed base provides Verint with an important strategic advantage as enterprises evaluate broader AI and automation investments.

Agentic AI is Expanding Beyond the Contact Centre

Verint's AI strategy increasingly extends beyond traditional customer service operations.

The company has focused heavily on practical automation use cases including coaching, knowledge delivery, quality evaluation, workflow automation and customer interaction analysis.

This positions Verint differently from vendors focused primarily on conversational AI or virtual agents.

The proposition is increasingly about improving workforce productivity and operational efficiency across customer-facing functions rather than simply automating customer conversations.

Vendor
Verint

Quadrant
Enterprise Transformer

Category
Open CCaaS & CX Automation

Procurement Pathway
Contact Centre Platform-Led

APAC Execution Remains a Differentiator

Success in APAC requires more than product capability. Verint remains one of the relatively small group of vendors able to point to meaningful customer scale across Australia, New Zealand, Singapore, Hong Kong, India and selected Southeast Asian markets.

Its longevity in the region, established partner ecosystem and understanding of local operational requirements continue to provide an advantage against newer entrants attempting to expand from North America or Europe.

This regional depth often receives less attention than product innovation but remains an important reason for Verint's continued relevance.

The Competitive Pressure is Shifting

Historically Verint competed primarily against specialist WEM providers. Increasingly it is competing against platform vendors attempting to make standalone workforce optimisation and analytics products unnecessary.

Genesys, NiCE, Salesforce, ServiceNow and Microsoft are all investing heavily in native workforce optimisation, AI-powered coaching, knowledge and analytics capabilities.

The strategic question is no longer whether Verint has superior standalone functionality. In many areas it does. The question is whether customers will continue to value best-of-breed capabilities enough to justify maintaining an overlay strategy.

VERINT

Vendor

Verint

Quadrant

Enterprise Transformer

Category

Open CCaaS & CX Automation

Procurement Pathway

Contact Centre Platform-Led

12-Month Outlook

- Verint enters the next year from a position of strength, but the nature of the challenge is changing.
- The opportunity is clear. Most APAC enterprises remain multi-vendor environments, and many are years away from achieving the single-platform architecture envisioned by major CCaaS and CRM providers. As organisations accelerate AI adoption, Verint's ability to layer automation, workforce optimisation, coaching and analytics across existing technology estates provides a compelling alternative to wholesale platform replacement.
- The risk is equally clear. Every major CX platform provider is attempting to absorb more of the value chain. Workforce management, quality assurance, knowledge management, coaching and analytics are increasingly viewed as native platform capabilities rather than standalone categories.
- As a result, Verint's success over the next 12 months will depend less on proving product superiority and more on proving economic superiority. The company must demonstrate that an independent optimisation layer delivers measurably better outcomes than relying solely on native capabilities embedded within CCaaS and CRM platforms.
- The most likely outcome is that Verint continues to strengthen its position within large enterprises, regulated industries and complex multi-platform environments, while facing increasing pressure in greenfield deployments and organisations pursuing aggressive platform consolidation strategies.
- In APAC specifically, where technology fragmentation remains the norm rather than the exception, the open-overlay model continues to have a strong structural rationale. The question is no longer whether Verint belongs in the modern CX stack. The question is how much of the stack enterprises will ultimately choose to optimise independently versus consuming from a single strategic platform provider.
- The announcement at Verint Engage 2026, the first since the acquisition by Thoma Bravo and merger with Calabrio repositioned what is now the Verint Agent Factory. The Agent Factory has three intelligence capabilities built on top of it – Workforce Intelligence, Desktop Intelligence and Quality Intelligence. The opportunity is the connection between understanding how agents behave, flexing the workforce to operationalise best-practice processes, and measuring against business outcomes rather than activity.

VONAGE

Vendor

Vonage

Quadrant

Mid-Market Challenger

Category

CPaaS & Communications Platform

Procurement Pathway

Developer & API-Led

Growing CPaaS Momentum and a Deeply Integrated Salesforce Relationship

Against the 2025 Outlook

The 2025 outlook positioned Vonage as a differentiated player sitting at the intersection of CPaaS, customer engagement and Salesforce-centric contact centre deployments. That assessment largely holds.

What has become clearer through 2026 is that Vonage's strategic value lies less in competing directly with enterprise CCaaS leaders and more in enabling organisations to embed communications, identity, authentication and customer engagement capabilities into broader digital experiences.

The Ericsson ownership story has matured beyond financial backing and increasingly influences product differentiation. Network APIs, identity services and telecommunications integration are becoming more prominent components of the proposition, creating capabilities that traditional CCaaS vendors and most CPaaS competitors struggle to replicate.

At the same time, the limitations identified in the 2025 outlook remain. While Vonage continues to offer a capable contact centre platform, its market position is strongest where communications are embedded into business processes, applications and customer journeys rather than where organisations are seeking a comprehensive enterprise CX platform.

VONAGE

Vendor

Vonage

Quadrant

Mid-Market Challenger

Category

CPaaS & Communications Platform

Procurement Pathway

Developer & API-Led

Key Findings

CPaaS Remains the Centre of Gravity

Despite ongoing investment in contact centre capabilities, Vonage remains fundamentally a communications platform company.

The strongest customer stories continue to originate from programmable messaging, voice, video, authentication and customer engagement APIs rather than standalone contact centre transformation programs.

This distinction is important because it changes the buying conversation.

Organisations selecting Genesys, NICE or Salesforce are typically seeking a strategic customer service platform. Organisations selecting Vonage are often trying to embed communications directly into products, workflows or digital experiences.

Ericsson Creates a Genuine Strategic Differentiator

The acquisition by Ericsson continues to provide Vonage with a unique position in the market.

As mobile operators increasingly expose network capabilities through APIs, Vonage is becoming the primary mechanism through which enterprises can access services such as number verification, SIM swap detection, location intelligence and network quality information.

While these capabilities remain relatively niche today, they are highly relevant in sectors such as financial services, telecommunications, digital identity, e-commerce and fraud prevention.

This gives Vonage a differentiation story that extends well beyond traditional messaging and voice APIs.

VONAGE

Vendor
Vonage

Quadrant
Mid-Market Challenger

Category
CPaaS & Communications Platform

Procurement Pathway
Developer & API-Led

Salesforce Remains the Most Natural Fit

Vonage Contact Center continues to be strongest in Salesforce-centric environments.

The integration between routing, customer data, workflows and reporting remains a key differentiator and continues to resonate with organisations already invested in Service Cloud and Sales Cloud.

Unlike broader CCaaS vendors attempting to own the entire customer engagement stack, Vonage's positioning remains deliberately focused on delivering a highly integrated experience within the Salesforce ecosystem.

This clarity is a strength, but it also narrows the addressable market.

Strong Digital Engagement Credentials

Vonage remains particularly relevant for organisations pursuing digital-first customer engagement strategies.

Its ability to combine messaging, voice, video, authentication and workflow integration creates opportunities that extend beyond traditional contact centre use cases.

This is especially relevant across APAC, where mobile-first engagement models continue to dominate customer interactions across banking, retail, travel, telecommunications and digital services.

The proposition is often strongest when customer engagement is being designed into an experience rather than routed through a traditional service operation.

The CCaaS Gap Remains

While Vonage Contact Center continues to evolve, it still faces challenges competing directly with leading enterprise CCaaS platforms.

Areas such as workforce optimisation, advanced analytics, quality management, journey orchestration and agentic AI remain stronger within platforms such as NICE, Genesys and increasingly Salesforce itself.

For many enterprise buyers, Vonage succeeds because of its communications capabilities rather than because it offers the most comprehensive contact centre feature set.

VONAGE

Vendor

Vonage

Quadrant

Mid-Market Challenger

Category

CPaaS & Communications Platform

Procurement Pathway

Developer & API-Led

12-Month Outlook

- Vonage enters the next year with a clearer identity than many of its competitors. The opportunity is not to become another horizontal CCaaS provider. The opportunity is to become the platform through which enterprises orchestrate communications, identity and customer engagement across increasingly digital and AI-enabled experiences.

- The continued emergence of network APIs is likely to strengthen this position. As fraud prevention, authentication, identity verification and contextual engagement become more important, Vonage is well positioned to leverage Ericsson's telecommunications assets in ways that most software competitors cannot replicate.

- The strongest growth opportunities are likely to emerge in financial services, telecommunications, digital commerce, travel and platform-based businesses where communications are embedded directly into customer journeys rather than managed solely through contact centres.

- The challenge will come from two directions. Traditional CCaaS vendors continue to improve their digital engagement capabilities, while competitors such as Twilio are pursuing similar ambitions around programmable customer engagement.

- Success will therefore depend on Vonage's ability to move the conversation beyond communications APIs and establish itself as a strategic customer engagement platform that connects applications, networks, customers and increasingly AI-driven experiences.

- For APAC buyers, Vonage remains a compelling option where composability, embedded communications and Salesforce alignment are priorities. Organisations seeking a full-suite enterprise contact centre platform, however, will continue to find stronger capability depth among the market leaders.

Vendor

Zendesk

Quadrant

Future Builder

Category

CRM & Customer Service Platform

Procurement Pathway

CRM & Service Platform-Led

From Service Desk Workflows to an AI Native CX Contender | Key Findings

Existing Customer Base Creates a Powerful Expansion Engine

Unlike many new entrants to the contact centre market, Zendesk is not starting from zero. Zendesk already maintains one of the largest customer service software footprints in APAC, particularly across mid-market organisations, digital-native businesses, retail, technology, education and fast-growing enterprises. For many organisations, Zendesk is already the system of record for customer interactions, knowledge management and support operations.

The acquisition of Local Measure provides Zendesk with the voice and CCaaS capabilities required to expand beyond digital service channels. More importantly, it gives Zendesk a platform that can be sold directly into an existing installed base rather than relying solely on net-new customer acquisition.

This creates a significant strategic advantage. For many existing Zendesk customers, the question is no longer whether they need a contact centre platform, but whether they can extend their existing Zendesk investment to include voice, workforce engagement and AI-powered customer operations.

Zendesk's Asia Pacific strategy focuses on leveraging AWS cloud infrastructure to offer hyper-localised data residency, compliance with regional privacy frameworks, and crystal-clear regional voice routing.

zendesk

Vendor
Zendesk

Quadrant
Future Builder

Category
CRM & Customer Service Platform

Procurement Pathway
CRM & Service Platform-Led

Outcome-Based AI Pricing Challenges the Market

Zendesk is taking one of the most aggressive commercial positions in the industry through its outcome-based AI pricing model.

Rather than charging customers based on AI consumption, tokens or interactions, Zendesk charges only when AI successfully resolves a customer issue. Combined with entry-level pricing for Zendesk Contact Center, the model is designed to lower adoption barriers and align vendor success with customer outcomes.

Conceptually, this is one of the most customer-friendly pricing models currently available in the CX market. While long-term economics remain largely untested at scale, the approach directly addresses growing buyer concerns around unpredictable AI consumption costs.

Autonomous Service Workforce Signals a Broader Ambition

Zendesk's AI strategy has evolved beyond virtual agents and workflow automation.

The company is increasingly positioning around what it describes as an Autonomous Service Workforce, a model where specialised AI agents work alongside human employees to deliver customer and employee support outcomes as a unified service team.

The launch of Agent Builder expanded AI Agents, AI Agents for Employee Service and new Copilot experiences for agents, administrators, knowledge teams and analysts demonstrates an ambition that extends beyond traditional CRM and contact centre software.

Rather than treating AI as a feature embedded within workflows, Zendesk is positioning AI as a workforce layer capable of resolving issues, managing knowledge, supporting decision-making and executing service tasks across the organisation.

The vision is ambitious, but it represents one of the more coherent AI operating models currently being articulated in the CX market.

05

Vendor Assessments

zendesk

Vendor

Zendesk

Quadrant

Future Builder

Category

CRM & Customer Service Platform

Procurement Pathway

CRM & Service Platform-Led

Local Measure Accelerates Contact Centre Credibility

The acquisition of Local Measure, an AWS Partner, transformed Zendesk from a digital service platform with voice ambitions into a credible CCaaS provider.

The acquisition brought proven voice technology, experienced contact centre leadership and an established presence within the Australian market. It also provided Zendesk with a faster pathway into enterprise customer service environments than would have been possible through internal development alone.

While Zendesk remains early in its CCaaS journey compared with established leaders such as Genesys, NICE and Cisco, Local Measure significantly accelerated its ability to compete in voice-centric customer service environments.

Workforce Engagement is Becoming a Strategic Priority

Historically, workforce engagement management has not been a primary buying reason for Zendesk. That is changing. Zendesk is investing aggressively in workforce planning, quality management, coaching and performance intelligence as part of a broader strategy to create a unified service operations platform.

The launch of Quality Score, which evaluates both human and AI interactions, highlights the company's growing focus on managing blended workforces consisting of human employees and autonomous agents.

While Zendesk still trails specialist providers such as NiCE and Verint in capability depth, the pace of investment suggests workforce engagement will become a far more important part of the Zendesk story over the next several years.

zendesk

Vendor

Zendesk

Quadrant

Future Builder

Category

CRM & Customer Service Platform

Procurement Pathway

CRM & Service Platform-Led

12-Month Outlook

- Zendesk enters the next year with significant momentum and one of the clearest growth opportunities in the market. Unlike most CCaaS vendors pursuing net-new customers, Zendesk's primary opportunity is expanding within its substantial existing customer service install base. The combination of Zendesk Contact Center, outcome-based AI pricing and an increasingly capable AI portfolio creates a compelling pathway from digital service into voice, workforce engagement and automation.

- Zendesk now sells an all-in-one Zendesk Resolution Platform featuring unified agent desktops, native WFM/QA, and core telephony powered globally by Amazon Web Services (AWS) infrastructure. This puts them in a strong position to win against the CCaaS vendors in the mid-market segment and potentially the Enterprise market as they scale. They are also in the race against other CRM vendors that are building contact centre capability. If they execute this well with the right partners in the region, they could scale quickly.

- The Autonomous Service Workforce vision will be a key differentiator. Through Agent Builder, AI Agents, Employee Service capabilities and a growing portfolio of copilots, Zendesk is positioning AI as a workforce layer rather than simply another automation tool. If execution matches ambition, Zendesk could emerge as one of the strongest agentic AI challengers in the CX market.

- Workforce engagement remains the area to watch. Investments in quality management, workforce management and analytics are accelerating. The challenge over the next 12 months will be maintaining the simplicity and ease of use that made Zendesk successful while adding the operational depth required to compete more broadly in the contact centre market.

- The most likely outcome is continued growth across the mid-market and existing Zendesk customer base, with increasing enterprise relevance as the Local Measure acquisition, AI roadmap and workforce engagement capabilities mature.

Vendor
Zoom (Contact Centre)

Quadrant
Future Builder

Category
UCaaS & CCaaS Platform

Procurement Pathway
Contact Centre Platform-Led

Outstanding Momentum in Japan, Growth in ASEAN and Strong in Mid-Market Growth

Against the 2025 Outlook

The 2025 outlook positioned Zoom as one of the most credible growth stories in APAC CX, combining strong UCaaS momentum with an increasingly capable contact centre platform. That assessment has largely proven correct.

Over the past year Zoom has strengthened its position across Japan, expanded aggressively into India and ASEAN, and continued to leverage the enormous installed base of Zoom Meetings and Zoom Phone customers. The platform has evolved beyond challenger status in many mid-market and upper mid-market opportunities, with buyers increasingly evaluating Zoom Contact Center alongside established providers rather than treating it as an emerging alternative.

The biggest development has been execution rather than innovation. While competitors often focus on feature announcements, Zoom has demonstrated an ability to localise effectively, build regional partnerships and convert collaboration customers into contact centre customers.

The enterprise story remains the next frontier. Zoom has demonstrated it can win increasingly complex deployments, but the largest financial services, telecommunications and government opportunities remain heavily contested by incumbent CCaaS providers with deeper operational ecosystems and larger channel networks.

Key Findings

Japan Has Become Zoom's APAC Success Story

No market better illustrates Zoom's progress than Japan. Unlike many Western technology vendors that approach localisation primarily as a translation exercise, Zoom has invested heavily in local language support, compliance, partnerships, customer success and market presence.

The result is one of the strongest growth stories in the Japanese CX market, with adoption spanning government, retail and increasingly regulated industries.

Perhaps more importantly, Zoom has demonstrated that success in APAC requires market-specific execution rather than simply exporting North American operating models.

The Japanese momentum is now becoming a blueprint for broader regional expansion.

zoom

Vendor
Zoom (Contact Centre)

Quadrant
Future Builder

Category
UCaaS & CCaaS Platform

Procurement Pathway
Contact Centre Platform-Led

India is Emerging as a Strategic Growth Engine

Zoom's investment in India represents more than geographic expansion.

The introduction of native contact centre telephony across multiple telecom circles removes one of the major barriers to enterprise adoption and positions Zoom to participate more meaningfully in one of the world's largest contact centres and BPO markets.

India also aligns naturally with Zoom's strengths. Buyers often prioritise deployment speed, operational simplicity and commercial predictability, areas where Zoom continues to differentiate against more complex enterprise platforms.

The opportunity extends beyond domestic enterprises. India's role as a global outsourcing hub creates potential multiplier effects, with successful deployments influencing technology decisions across multinational organisations operating customer service functions throughout the region.

If Japan represents Zoom's credibility story, India may ultimately become its scale story.

The Platform Strategy is Working

The most significant competitive advantage Zoom possesses is not Contact Center itself.

It is the combination of Meetings, Phone, Contact Center and AI.

Many organisations increasingly view employee collaboration, enterprise telephony and customer engagement as interconnected decisions rather than separate procurement exercises.

Zoom's ability to bundle these capabilities into a single platform is proving particularly attractive to organisations seeking vendor consolidation, simplified administration and lower operational complexity.

Vendor Assessments

Vendor

Zoom (Contact Centre)

Quadrant

Future Builder

Category

UCaaS & CCaaS Platform

Procurement Pathway

Contact Centre Platform-Led

Simplicity Remains a Major Differentiator

One of Zoom's most underrated strengths is operational simplicity.

Across multiple markets, buyers consistently cite ease of deployment, administration and user adoption as key reasons for selection.

This stands in contrast to many enterprise-grade contact centre deployments that require extensive implementation programs, specialist resources and lengthy time-to-value cycles.

For organisations prioritising speed, agility and operational efficiency, simplicity is increasingly becoming a strategic advantage rather than merely a usability feature.

AI Packaging is Resonating with Buyers

Zoom's approach to AI continues to differ from many competitors.

Rather than aggressively monetising every AI interaction through consumption-based pricing models, Zoom has embedded substantial AI capability into its core platform offering while reserving deeper workflow automation and customisation for premium services.

This approach has resonated strongly with cost-conscious organisations seeking predictable operating models and fewer surprises as AI adoption scales.

In an environment where many buyers remain uncertain about future AI consumption costs, pricing simplicity is becoming an increasingly important differentiator.

Channel Maturity Remains the Largest Constraint

Despite significant progress, Zoom's go-to-market maturity still lags some established competitors.

The company has built strong relationships across regional and specialist partners but remains underrepresented among many of the largest systems integrators, outsourcing providers and transformation consultancies that influence major enterprise decisions.

This matters particularly in government, financial services and large-scale transformation programs where partner credibility often becomes as important as platform capability.

The technology is increasingly enterprise ready. The ecosystem is still catching up.

Vendor

Zoom (Contact Centre)

Quadrant

Future Builder

Category

UCaaS & CCaaS Platform

Procurement Pathway

Contact Centre Platform-Led

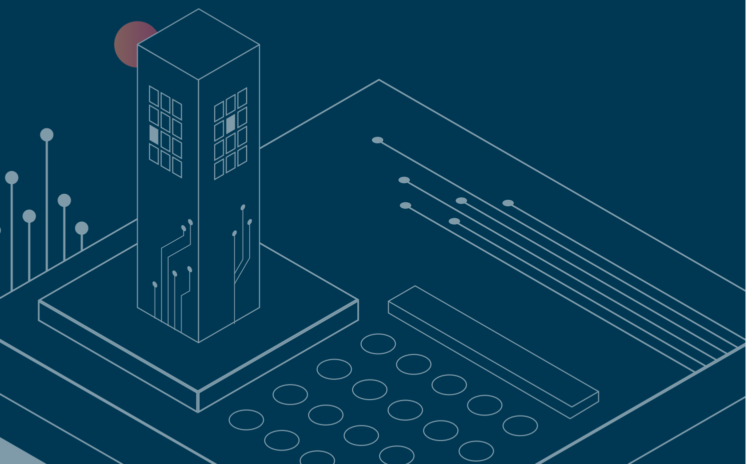
12-Month Outlook

- Zoom enters the next year as one of the most closely watched vendors in the APAC CX market. The growth opportunity remains substantial. The company continues to benefit from one of the largest installed collaboration and telephony customer bases in the world, creating a natural pathway into customer experience transformation conversations.
- The strongest growth is likely to continue across Japan, India and Southeast Asia, where organisations increasingly value deployment speed, operational simplicity and predictable AI economics. The next challenge is moving further upmarket.
- To become a genuine top-tier enterprise CCaaS provider, Zoom must demonstrate success in highly complex environments involving large-scale workforce optimisation, sophisticated compliance requirements, extensive systems integration and multi-country service operations.
- Building stronger relationships with Tier 1 systems integrators, outsourcing providers and enterprise consulting partners will be critical to that ambition.
- The AI strategy also bears watching. Zoom's inclusive pricing model continues to resonate with buyers frustrated by escalating AI consumption costs elsewhere in the market. If competitors continue to move toward token-based or consumption-heavy commercial models, Zoom's approach could become an increasingly powerful competitive weapon.
- The most likely outcome over the next 12 months is continued share growth across the mid-market and upper mid-market, alongside selective enterprise wins that further validate the platform's maturity. The question is no longer whether Zoom belongs in serious CCaaS conversations.
- The question is how quickly it can convert collaboration leadership into sustained enterprise CX leadership across APAC.

06

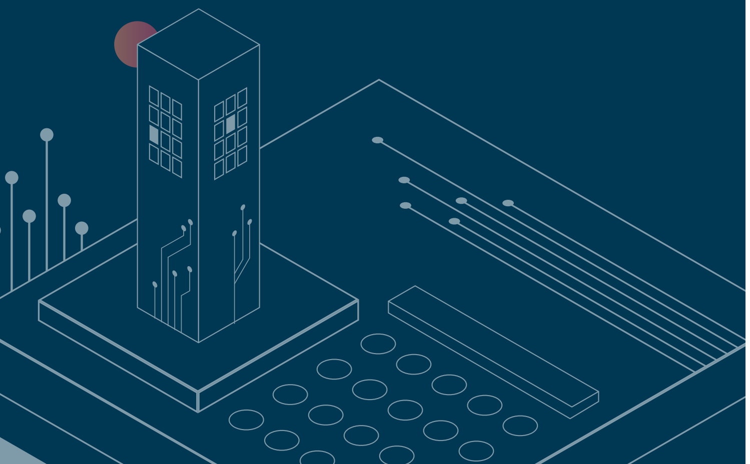
Buyer Guidance

Product Risks	Why They Matter
AI is bolt-on via acquisition — poorly integrated	Conversational AI added through acquisition with no unified data layer, no consistent API surface, and a separate UI. Integration debt will cost more than the feature is worth.
Heavy professional services dependency	If the vendor cannot tell you the cost to run the platform without their services team, the total cost of ownership is not what the contract says it is.
Opaque AI pricing	Usage-based AI pricing without consumption guardrails or simulation tools is a budget ambush. Demand a worked example at your call volumes before signing.
No published AI governance policy	In 2026, responsible AI is table stakes. Vendors without a public position on hallucination controls, model explainability and human-in-the-loop requirements should not be shortlisted.
Weak APAC presence outside ANZ	A vendor with strong Australia references but no proven delivery in your target market is an ANZ vendor trying to become an APAC vendor. Different risk profile.
Asian language claims without evidence	Mandarin, Japanese, Thai and Bahasa NLP accuracy varies enormously. Demand live demos in your target languages. Marketing claims are not a substitute.
SI partner ecosystem is one name deep	A single certified partner per market is a delivery risk. If that relationship breaks, your implementation stalls. Require demonstrated partner bench depth before committing.
No verifiable APAC customer evidence	Case studies from North America or Europe do not validate APAC capability. Require references from organisations of comparable size in your region and sector.



06

Buyer Guidance



Questions to Ask Every Vendor

1. Show me three customers who use your platform the way we intend to use it, not just customers of a similar size.

Most vendors can produce a logo. Far fewer can demonstrate a customer operating the same channels, integrations, compliance requirements, AI capabilities and service model you are planning.

2. What functionality requires additional products, licences, tokens, consumption charges or third-party solutions?

Many platforms appear comparable until commercial negotiations begin. Buyers should understand which capabilities are native, which require separate purchases and which create ongoing consumption costs.

3. If we implement exactly what you have demonstrated today, what capabilities will still require manual workarounds?

Every platform has limitations. The quality of the answer often reveals more than the limitation itself.

4. Show us how an administrator, team leader and operations manager would manage the platform day-to-day without vendor assistance.

Most demonstrations focus on the agent experience. Operational ownership sits with administrators, workforce planners, quality teams and business managers.

5. What are the three most common reasons customers fail to realise expected benefits from your platform?

Experienced vendors know where projects struggle. Weak vendors pretend failure never occurs.

6. What skills, roles and internal capabilities will we need to operate this successfully after go-live?

Technology rarely fails because of technology. It fails because organisations underestimate the operational capability required to support it.

7. Which roadmap items featured in this proposal are available today and which remain future commitments?

Buyers should clearly separate deployed capability from roadmap intent. Many sourcing decisions are made on features that do not yet exist.

8. Show us the total cost of ownership over five years, including AI consumption, storage, integrations, professional services, support and future expansion.

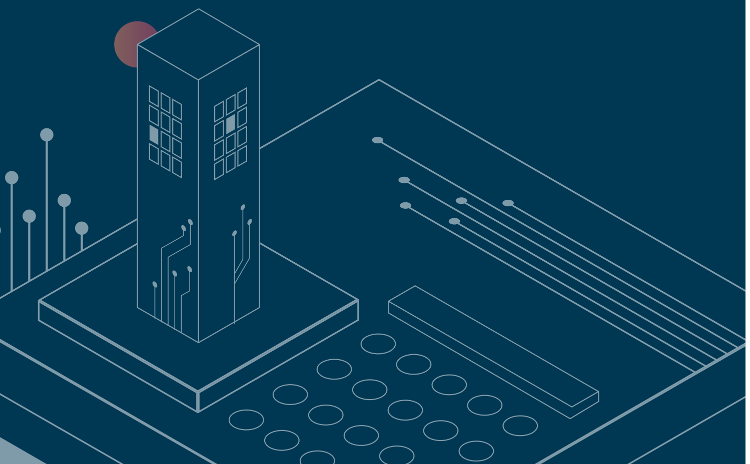
The subscription price is often one of the smallest components of long-term platform cost.

9. If we wanted to leave your platform in three years, what would the migration challenges be?

Every vendor discusses implementation. Very few discuss exit. Understanding portability of data, workflows, AI models and integrations is essential.

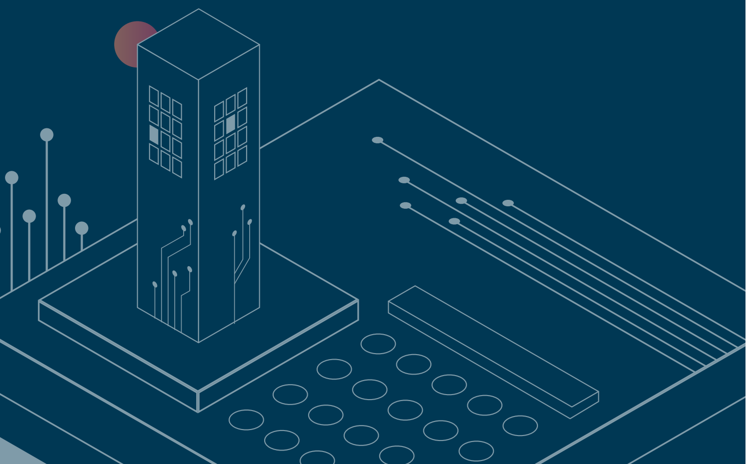
10. What operational metrics have improved most consistently across your customer base and what evidence supports those claims?

Move beyond generic ROI statements. Ask for measurable outcomes supported by real customer examples, benchmark data or case studies.



07

About the Authors



Audrey William, CrayonIQ

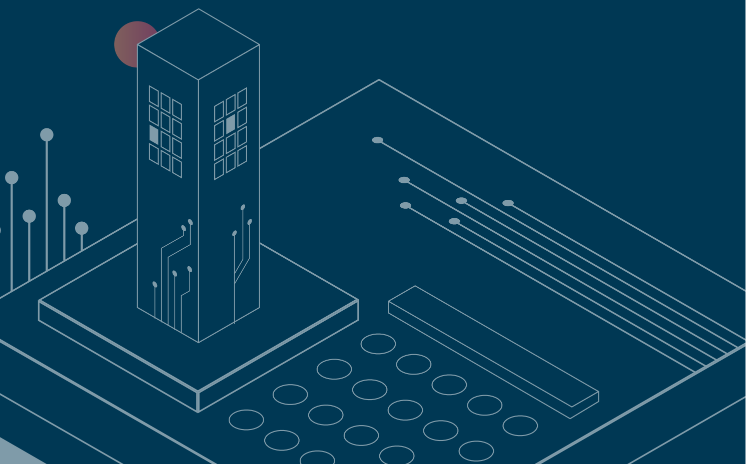
Founder & Principal Analyst. Asia Pacific's leading independent CX analyst. 25+ years tracking vendor capability across the region.

Michael Clark, CrayonIQ

Principal Advisory Strategist delivering independent market analysis, executive advisory, and strategic insights to help organisations make smarter technology and transformation decisions. Michael is also Founder and Principal Advisor at CXTT Consulting.

08

Disclaimer



Disclaimer

© 2026 CrayonIQ. All rights reserved. No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording or otherwise, without the prior written permission of CrayonIQ. This Buyers Guide is based on independent research, market analysis, publicly available information, vendor briefings and customer insights available at the time of publication. While every reasonable effort has been made to ensure the accuracy of the information presented, technology markets evolve rapidly and product capabilities, commercial models, pricing and vendor strategies may change without notice. The information contained in this publication is provided for general informational purposes only and should not be relied upon as legal, financial, procurement or investment advice. Organisations should undertake their own due diligence and evaluation before making purchasing or strategic investment decisions. Vendor inclusion, positioning, scoring and assessments reflect CrayonIQ's independent research methodology and professional judgement. They should not be interpreted as endorsements, certifications or guarantees of current or future product capability, commercial success or vendor performance. The opinions and assessments expressed represent the independent views of CrayonIQ at the time of publication and are subject to change without notice. CrayonIQ makes no representations or warranties, express or implied, regarding the completeness, accuracy or suitability of the information contained in this publication and accepts no liability for any loss or damage arising from its use.

Use of Artificial Intelligence

Consistent with our belief that AI should augment rather than replace human expertise, CrayonIQ uses AI to assist with research, editing, and publication. All market assessments, vendor evaluations, scoring, and conclusions remain the independent judgement of CrayonIQ's human analysts.