



IDC MarketScape

IDC MarketScape: Worldwide Agentic Contact Center-as-a-Service Platforms 2026 Vendor Assessment

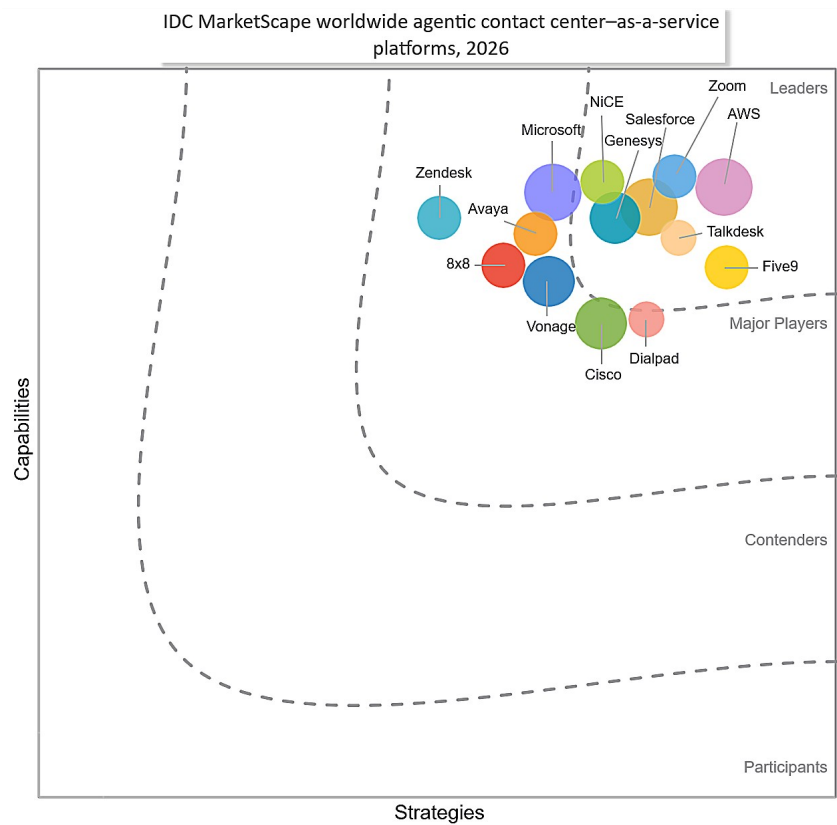
Michelle Morgan

THIS EXCERPT FEATURES NICE AS A LEADER

IDC MARKETSCAPE FIGURE

FIGURE 1

IDC MarketScape worldwide agentic contact center-as-a-service platforms vendor assessment



Source: IDC, 2026

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

ABOUT THIS EXCERPT

The content for this excerpt was taken directly from IDC MarketScape: IDC MarketScape: Worldwide Agentic Contact Center-as-a-Service Platforms 2026 Vendor Assessment (Doc # US54117326).

IDC OPINION

Contact center as a service (CCaaS) did not start as a strategic category. It started as a way to move an automated call distributor (ACD) off a datacenter rack and onto someone else's infrastructure, priced by the seat and sold on uptime. That framing held for the better part of a decade and shaped how buyers evaluated vendors, largely on reliability, channel coverage, and per-agent cost. A fair amount of RFP language still reflects that era, even though the platforms being evaluated have long since moved past it.

What has moved them past it is the speed at which new capabilities are being added to the old ACD core. Voice agents have gone from proof-of-concept (POC) demos to something closer to a standard line item, and generative AI has layered on top of the transcription and sentiment tools that were already common before it arrived. That stacking is easier to see in a vendor briefing than in a production environment, though. A road map slide and an actual deployment are two different documents, and the gap between them, like how much of this capability enterprises are actually running at scale, versus piloting, versus licensing and shelving, is where most of the interesting questions in this category currently sit.

It is also the gap that "agentic AI" is being layered into next, which is worth pausing on before taking the term at face value. At a minimum, it describes systems capable of executing multistep workflows with less human handoff than today's bots require, such as routing a case, pulling account context, and resolving it without a live agent ever touching the interaction. If that capability matures as described, it does not just add another feature to the CCaaS stack; it changes what the platform needs to orchestrate in the first place and pushes the category toward something broader than contact center software, something like a customer experience (CX) platform spanning marketing, service, and commerce workflows rather than a tool that happens to touch some of them. That trajectory is directional, not settled. Vendors are repositioning around it faster than their underlying architectures are necessarily changing. Which vendors have the orchestration depth to back that positioning, and which are further along on messaging than on shipped capability? That's the question the assessments that follow take up next.

IDC MARKETSCAPE VENDOR INCLUSION CRITERIA

To be included in this IDC MarketScape assessment, participating vendors were required to meet the following criteria:

- Must report a minimum of \$10 million combined on-premises and cloud-deployed recurring revenue
- Must have customers in production (general availability) at the time of publication
- Must support the following core features as part of their solution:
 - Omni-channel routing and interaction management
 - API-first integration layer
 - Orchestration engine and workflow execution
 - Knowledge management and data retrieval
 - Workforce management and quality oversight
- Must have a proven track record with verifiable customer success stories
- Must have sufficient capitalization to support ongoing operations and innovation

ADVICE FOR TECHNOLOGY BUYERS

For those assessing CCaaS platforms, consider the following:

- **Treat CCaaS as a service orchestration layer, not a better ACD.** The most useful reframe for a buyer is architectural. Position the platform as the hub connecting channels, routing logic, data, workflows, and downstream systems, not as an upgrade to the phone queue. That framing changes what you evaluate. Integration maturity with CRM, ticketing, the data lake, workforce engagement management, and bot frameworks becomes as important as any feature on the checklist, and arguably more predictive of whether the deployment succeeds. Buyers that skip this step tend to end up with point solutions that solve a narrow problem well and undermine journey visibility everywhere else.
- **Anchor the evaluation to use cases and measurable outcomes.** Feature tours are easy for vendors to run and hard for buyers to act on. A shorter list of priority use cases, such as intelligent routing for a sales queue, proactive outreach on digital channels, and agent assist on complex support tickets, provides the evaluation with concrete targets to test against. Translate each use case into a requirement theme (routing logic, AI assist, analytics, workforce engagement management [WEM], self-service, integration pattern) and tie it to a metric that already matters to the business: first-contact resolution, CSAT, conversion, and handle time. A structured evaluation

template that forces vendors to demonstrate specific use cases in a live POC will yield results that a generic demo never will.

- **Be deliberate about AI investment, unit economics, and governance.** Not all AI in a CCaaS platform carries the same risk or the same payoff, and treating it as a single line item obscures that. Table stakes capabilities like transcription, basic analytics, and simple bots are worth separating from strategic bets like agentic workflows or real-time optimization, because the value cases for each look different. Unit economics matter here: Per-minute, per-interaction, and per-seat AI pricing can look reasonable in isolation and add up badly against a realistic adoption curve, so it is worth modeling actual usage rather than the vendor's assumed usage. Governance deserves the same deliberateness. Basic responsible-AI guardrails, such as data use, human oversight, and compliance checkpoints, should be defined before the automation road map outpaces the organization's risk posture, not after.

VENDOR SUMMARY PROFILES

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

NiCE

After a thorough evaluation of its offerings and capabilities, IDC has positioned NiCE in the Leaders category in this 2026 IDC MarketScape for worldwide agentic contact center-as-a-service platforms.

NiCE (Nasdaq: NICE) is a publicly traded enterprise software company originally founded in 1986 in Israel as Neptune Intelligence Computer Engineering, with current headquarters in Hoboken, New Jersey, and major operations in Ra'anana, Israel. The company's Customer Engagement segment centers on NiCE CXone, an AI-powered customer experience platform launched in 2017 that unifies automation, agentic AI, analytics, and orchestration.

In 2025, NiCE acquired conversational AI vendor Cognigy for \$955 million, materially expanding its agentic AI capabilities across voice and digital channels, and secured a 40,000-seat agreement with the U.K.'s Department for Work and Pensions, along with a \$578 million deal to help transform Services Australia. NiCE reported 14% year-over-year cloud revenue growth in its February 2026 results, and the company continues to expand its workforce empowerment and interaction orchestration tools, including the newly launched native NiCE AI Agents for autonomous customer resolution.

Quick facts about NiCE include:

- Founded 1986 (as Neptune Intelligence Computer Engineering); headquartered in Hoboken, New Jersey, with major operations in Ra'anana, Israel
- Publicly traded (Nasdaq: NICE)
- **Core product:** NiCE CXone, an AI-powered CX orchestration platform
- **Recent acquisition:** Cognigy (2025, \$955 million) for agentic conversational AI
- **Compliance:** Supports GDPR, FedRAMP, and data sovereignty requirements in Australia, the United Kingdom, and the EU
- **Pricing model:** Supports all widely used pricing models, including configured users, concurrent users, consumption-based, and outcome-based pricing

Strengths

- **Feedback-driven road map process.** A structured approach to incorporating customer feedback and telemetry into the product road map supports a customer-informed innovation narrative.
- **Human-AI back-office collaboration and coaching tools.** Both are fully supported, reinforcing a well-rounded automation and workforce enablement story that spans the interaction life cycle from AI-assisted efficiency gains in non-real-time workflows to the structured development of agents that handle interactions AI doesn't fully automate. For buyers evaluating platforms holistically rather than feature by feature, this combination signals that NiCE's investment in AI extends beyond the live interaction into the broader operational and people management fabric of the contact center.
- **Knowledge governance.** Full support for versioning, approval workflows, and access control reflects a compliance-ready knowledge management approach suited to regulated or highly structured environments.

Challenges

- **Platform complexity and administrative overhead.** The platform can be admin heavy, requiring a dedicated team to design, maintain, and optimize call flows and configurations. This level of administrative investment can slow time to value and raise the total cost of ownership for organizations without existing platform specialist resources. However, recent AI-driven features (agentic analytics, AI studio, and agentic AI assist) actively reduce manual configuration and administrative burden.
- **Balancing AI-first ambition with proof.** The more NiCE positions CXone as an AI-first orchestration platform, the more it will need to substantiate that positioning with live customer references, quantified outcomes, and clearly articulated deployment patterns. Current agentic customer references are primarily standalone Cognigy deployments.

Consider NiCE when

NiCE is well suited to large enterprises and government agencies that need an AI-first, single-platform CX solution combining automation, analytics, and workforce engagement management at a very large scale, as evidenced by its multithousand-seat public sector deployments. It is a strong choice for organizations prioritizing rapid adoption of agentic AI following the Cognigy acquisition. Smaller organizations or those seeking simpler, lower-cost deployments may find the platform's breadth better suited to enterprise-scale operations than to lean or single-channel use cases.

APPENDIX

Reading an IDC MarketScape graph

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

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

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

The size of the individual vendor markers in the IDC MarketScape represents the market share of each individual vendor within the specific market segment being assessed.

IDC MarketScape methodology

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

Market definition

An agentic contact center platform is a cloud-based customer service platform that combines traditional contact center capabilities — omni-channel routing, workforce management, and analytics — with autonomous AI agents that possess the ability to understand customer intent, retrieve information across disconnected systems, make independent decisions within defined guardrails, and execute end-to-end service workflows without human intervention.

LEARN MORE

Related research

- *Market Share: Worldwide Contact Center Applications Software Shares, 2025: 12.1% Growth Signals AI-Driven Shift* (IDC #US54554826, June 2026)
- *Predict, Prevent, Resolve: Turning Customer Experience into a Self-Restoration System* (IDC #US54488426, April 2026)
- *IDC Market Glance: AI-Enabled Contact Center and Customer Service, 1Q26* (IDC #US54446726, March 2026)
- *IDC Survey Spotlight: Are Economic Pressures Slowing the Push Toward AI Agents?* (IDC #US54343526, March 2026)

Synopsis

This IDC study explores the evolution of CCaaS from basic call distribution to advanced, AI-driven orchestration platforms. It highlights the shift toward agentic AI, enabling autonomous workflows and broader customer experience integration. This document evaluates vendors based on capabilities, strategy, and market share, offering guidance for buyers on architectural framing, use case alignment, and AI governance to ensure successful deployment and measurable outcomes.

“The real disruption in contact centers isn’t AI itself,” says Michelle Morgan, research manager, AI-Enabled Sales, Customer Service and Contact Center Strategies at IDC. “It’s how agentic platforms redefine what must be orchestrated, measured, and governed across the entire customer journey. Individual AI capabilities are, at this point, table stakes. What changes is the operating model underneath them: When an agent can initiate actions, hand off across systems, and make judgment calls that used to require a human, the unit of work shifts from a single interaction to a chain of them. That shift is where most contact center leaders’ existing governance frameworks start to show their age.”

ABOUT IDC

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Global headquarters

One Beacon Street
Suite 33100
Boston, MA 02108
USA
508.872.8200
X: @IDC
blogs.idc.com
www.idc.com

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