

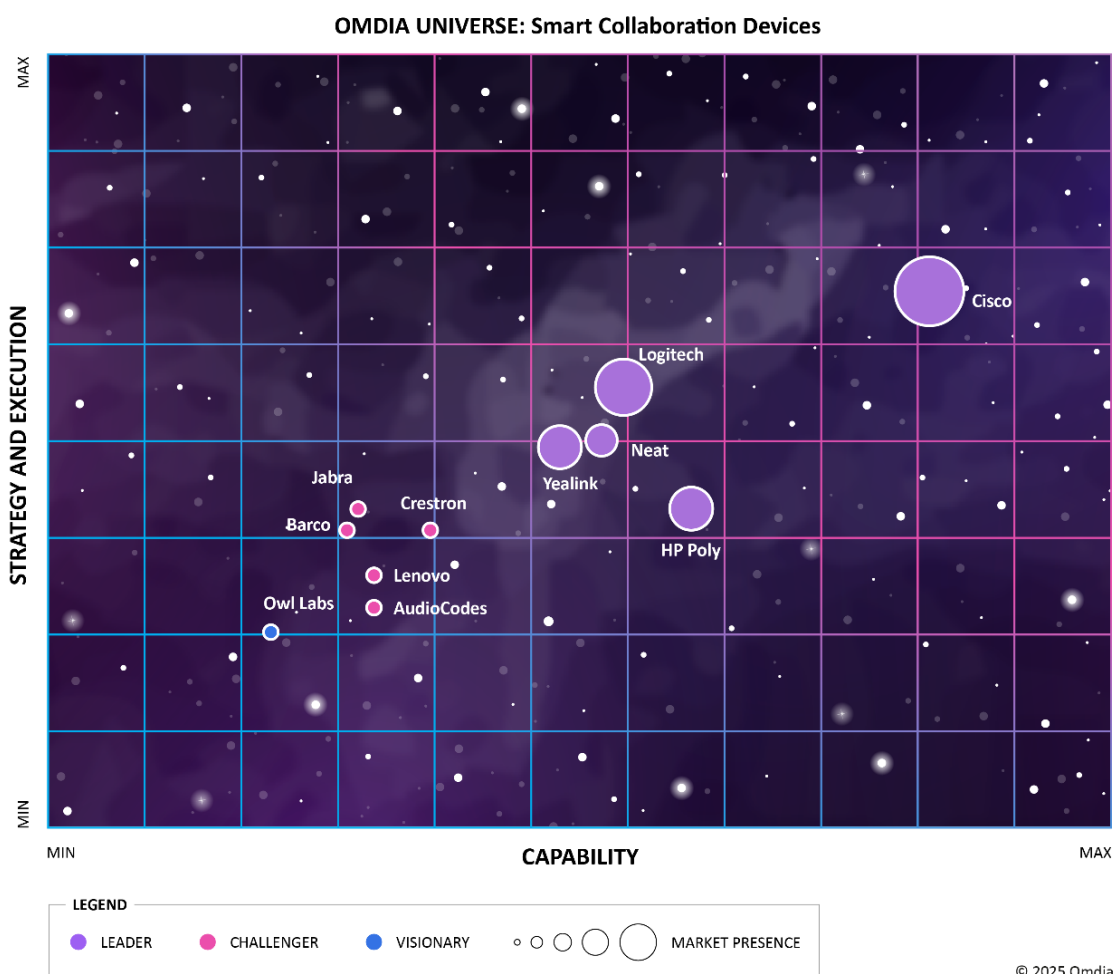
Omdia Universe: Smart Collaboration Devices, 2025

Summary

Catalyst

The *Omdia Universe: Smart Collaboration Devices* analyzes the market's top 11 video conferencing (VC) vendors, offering crucial insights for enterprises navigating the hybrid work era. As organizations prioritize advanced collaboration tools for productivity, this competitive landscape continues to evolve through constant innovation. The report provides essential guidance for enterprises developing meeting room strategies, helping them select the right vendor to enhance collaboration and maximize ROI in their VC investments.

Figure 1: The Omdia Universe: Smart Collaboration Devices



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Source: Omdia

Omdia view

The Omdia Universe grid (**Figure 1**) showcases two clusters of vendors that provide comparable offerings. This view consolidates and averages data from each vendor across 18 unique categories related to product

capability, strategy, and execution, which were further divided into 20 subcategories. Businesses need a more in-depth analysis beyond the grid view, as one vendor may perform exceptionally well in a particular category while another may excel in a different area. This underscores the importance of selecting a vendor that aligns with specific business requirements. By examining vendors and their portfolios at the subcategory level, businesses can gain a more comprehensive and detailed understanding. This is one of the reasons Omdia created this Universe report.

From a strategic perspective, the Omdia Universe grid highlights the following:

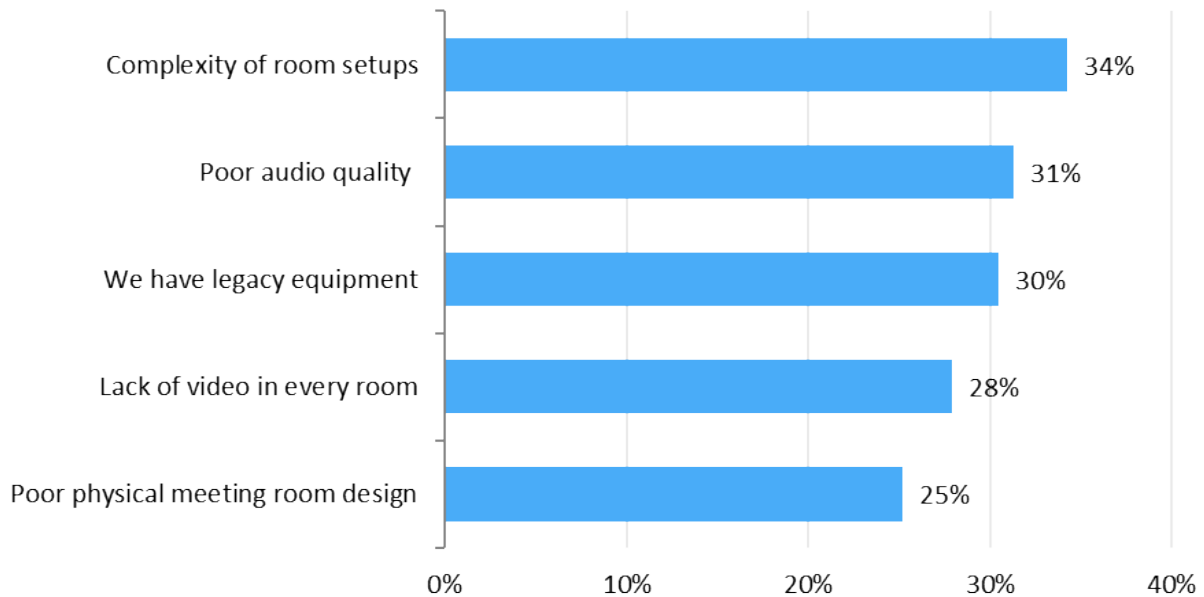
- In the top right corner, Cisco stands out in all three categories: solution capability (X-axis), market share (size of the bubble), and strategy and execution (Y-axis), establishing it as the clear market leader.
- The cluster of vendors in the top right quadrant also leads the market with their product capabilities and robust strategy and execution.
- The second cluster of vendors is innovating swiftly, enhancing their solution capabilities and go-to-market (GTM) strategies, which makes them compelling competitors.
- There is only one visionary on the grid with significant potential to move into the challenger position with the right strategy, execution, and product portfolio enhancements.

This analysis emphasizes the competitive landscape, considering current market trends, including the rising demand for seamless integration and artificial intelligence (AI)-powered features in meeting room devices. Challengers and visionaries should center on innovation and refining execution strategies to boost market share and customer satisfaction, while the leaders must maintain their momentum.

Omdia's VC devices survey, published in January 2025, identifies five main challenges enterprises face as they strive to enhance collaboration through technology.

Figure 2: Challenges in addressing collaboration needs

Q14: Which are your biggest challenges in addressing collaboration across your organization?



Notes: n=476

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Source: Omdia

Large enterprises also face challenges coordinating meeting room upgrade projects because of varied purchasing approaches. Multiple buying centers exist—CIO, communications leaders, human resources (HR), Pro AV teams, facilities managers, and IT teams, each with their own requirements. A democratic approach to evaluating options becomes paramount to ensure that differing budgets and technology preferences across departments, regions, and use cases are considered. The other challenge is managing a complex, diverse meeting room estate, driving effectiveness and ROI. Often, organizations leverage third-party expertise, such as AV installers or resellers, who advise them on the type of solution to deploy and the cost per meeting room for installation, operations, and maintenance. However, businesses do not fully understand the value proposition of the different vendor solutions available in the market. This Omdia Universe focuses on the wide video conferencing and collaboration devices market landscape and guides navigating device selection in this dynamic yet mature market.

Given that all the challenges mentioned above in the chart do not exist in silos but often overlap, businesses must identify the best solution to address them in totality. **Table 1** highlights what enterprises seek when evaluating vendors. Omdia shortlisted 11 vendors capable of addressing them after careful assessment. Omdia approached all identified vendors to provide input on this Omdia Universe. All except Yealink and Lenovo completed the questionnaire. However, Omdia has included them, using its knowledge of their products and services to ensure fair market representation (see **Figure 1**).

Table 1: Customer pain points and their expectations

Pain points	Enterprise expectations
Complexity of room setup	A vendor with a broad portfolio Automated provisioning, ease of deployment, and setup Devices with auto-configuration User-friendly interfaces to simplify installation and configuration AI-enhanced provisioning
Poor audio quality	Advanced AI-driven audio technology: Devices with AI-noise cancellation, echo reduction, and beamforming microphones and speakers
Legacy equipment	Compatibility and integration: Devices that support backward compatibility and seamless integration with existing systems Interoperability solutions Customer support
Lack of video in every space	Innovative ways to support BYOD rooms Affordable BYOD room solutions Cost-effective AI-enhanced cameras and video conferencing systems to ensure every room is equipped
Poor physical room design	Flexible and adaptable devices: Devices that can be easily adjusted or moved to accommodate various room layouts and sizes Supporting accessories Room designing software System integrator (SI)-led deployment

Source: Omdia

Analyzing the smart collaboration devices universe

Market definition

Smart collaboration devices are essentially video conferencing devices with AI functionality, catering to group and personal collaboration needs. These devices can be designed for various settings, including small and huddle spaces, mid-sized and large rooms, high-impact spaces, open spaces, and employees' desks for personal collaboration. The devices may offer many functionalities, including AI-driven facial recognition, people counting, background noise elimination, audio and video enhancements, speaker and presenter tracking, dynamic and auto framing, and echo cancellation. They can handle multiple camera angles to deliver the optimal view to the remote participant. These devices typically include:

- **1. Room kits** are assembled kits that work together as a system.
 - **a. USB cameras** are high-definition (HD) cameras that capture video.
 - **b. Microphones** are quality microphones that ensure clear audio transmission.
 - **c. Speakers** are speakerphones that deliver clear sound to participants.

- **d. Controllers** are devices or software that allow employees to manage meetings.
 - **e. Compute** is a processing platform running the collaborative meeting service room client.
- **2. All-in-one videobars** are Android-based devices that include compute, microphones, speakers, and built-in cameras.
 - **3. All-in-one collaboration boards:** These are touch-sensitive all-in-one displays with Android-based or Windows-based compute, microphones, speakers, and built-in cameras that allow users to annotate and take video meetings.
 - **4. Standards-based/H.323 endpoints:** Solutions include integrated or independent hardware for compressing and decompressing video (codecs) and cameras operating with on-premises-based infrastructure or using cloud-based services through an interoperability solution—Cloud Video Interop (CVI).
 - **5. USB cameras** are cameras that can be used to create a room system or those that can be deployed in bring your own device (BYOD) rooms.
 - **6. Wireless conferencing solutions** are solutions deployed in BYOD rooms that allow users to bring their laptops and use the room peripherals to take meetings wirelessly.

The following core and advanced categories were evaluated in this study:

- **Solution for small and mid-sized rooms:** All types of solutions were considered, including SIP/H.323 endpoints, Android, and Windows-based solutions that can be deployed in small and mid-sized rooms. All form factors—room kits, wireless conferencing solutions, all-in-one desktop-type solutions, videobars, and USB conference cameras—were evaluated. Primarily, solutions certified to work with Zoom, Microsoft, Google, RingCentral, and Cisco Webex were considered.
- **Solution for large rooms and high-impact spaces:** SIP/H.323, Android and Windows-based solutions in large rooms were considered. All form factors—room kits, collaboration boards, and videobars—were evaluated. Product certifications and vendor partnerships with ecosystem players were assessed, allowing for the creation of the right bundle for large spaces.
- **Solutions for open collaboration spaces:** Features, solutions, and technologies that enhance the value proposition of open spaces were considered, including AI-enhanced features for audio and video enhancements in open spaces and devices on wheels, such as collaboration boards and sensors.
- **Solutions for personal collaboration:** Key devices evaluated include webcams and all-in-one desktops.
- **Smart integrations:** Seamless connections with unified communications as a service (UCaaS) platforms, using AI for automation, and ensuring interoperability with various complementary hardware and software solutions. It also includes cloud integration for remote access, robust security features, and user-friendly interfaces to enhance the overall experience.
- **Complementary solutions:** Omdia assessed vendors' complementary offerings, including compute, desk booking, and room reservation panels, IP phones, collaborative meeting services,

and AI-based services. This helped Omdia understand the vendor's potential to deliver a more integrated solution that supports all collaboration needs.

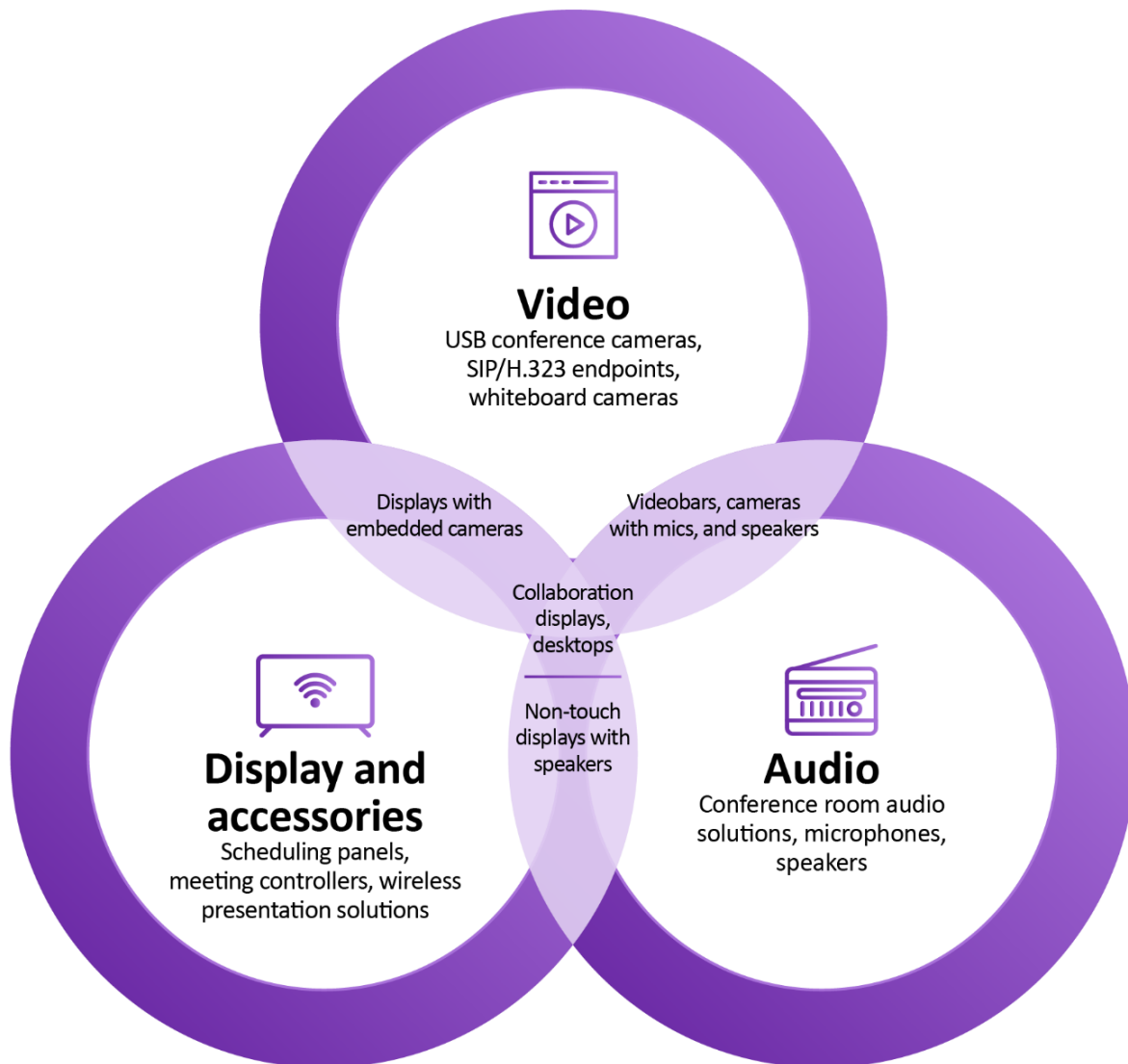
- **Monitoring and management:** These are solutions used to analyze, monitor, provision, troubleshoot, and manage meeting room devices using interactive dashboards. Cloud-based dashboards provide insights across areas, such as room usage, device status, energy consumption stats, device health, firmware updates, etc. A range of reports should be provided. Features should also include capabilities for building custom dashboards and reports.
- **Features:** This category incorporates audio and video enhancements, AI features, camera specifications, complementary solutions, API-led integrations, etc.
- **Portfolio functionality:** Omdia considered device management, device compatibility (ensuring different devices can work together seamlessly), security (implementing measures to protect devices and data), scalability, interoperability, sustainability, and complementary offerings. This comprehensive approach ensures that all devices within the portfolio are optimized for performance.
- **Security and compliance:** Security and compliance features include camera controls, device access, Wi-Fi-enabled security, and end-to-end encryption.

When comparing vendor portfolios, the focus often remains limited to features and capabilities, overlooking the larger context of vendors' revenue growth, GTM strategies, optimization, deployment, and management of solutions, as well as customer support, roadmaps, and partnerships. Acknowledging the importance of these challenges, Omdia also assessed the vendor's performance against eight key criteria:

- **Innovation:** This pertains to vendor innovations in devices for AI development and deployment, including AI features, AI chips, and cloud infrastructure.
- **Strategy and roadmap:** This refers to a vendor's innovation tailored for specific vertical needs, target audiences, and the degree of openness and collaboration with external stakeholders.
- **A vendor's GTM strategy** encompasses its tactics, such as channel-led, retail, direct sales, and associated models.
- **Vertical industry and geographic coverage** indicate the number of vertical sectors the portfolio aims to serve.
- **Partners and ecosystem:** This denotes the variety of the vendor's local and global distribution partners and systems integrators and their role in the ecosystem.
- **Customer experience:** Using an Omdia survey and online reviews, Omdia assessed a vendor's net promoter score (NPS).
- **Product quality:** Omdia evaluated products using a mix of testing, vendor-led demos, product reviews on the web, and key device components.
- **Revenue and unit shipment growth:** Omdia analyzed the vendor's revenue growth rate and unit shipments from 2021 to 2024.

Figure 3 illustrates the landscape of smart collaboration devices. Please note that this analysis did not consider non-touch and touch displays, except collaboration boards.

Figure 3: Video collaboration devices: An overview



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Source: Omdia

Market dynamics

The video conferencing devices market is a competitive market for the following reasons:

- **Multiple vendors:** Numerous companies offer video conferencing devices; Omdia tracks more than 50 vendors in this market every quarter.
- **Comparable products:** Vendors provide comparable products—including cameras, microphones, and integrated systems—facilitating the ease of brand switching for consumers. However, it is essential to note that they must also transition to different management platforms. Consequently, they often encounter a diverse array of devices, resulting in increased challenges in device management.

- **Innovation and differentiation:** Vendors continuously innovate and differentiate their products to gain a competitive edge, but the core functionalities remain comparable.
- **Consumer choice:** The presence of multiple vendors means that consumers have a wide range of options, fostering competition.
- **Pricing:** The market for video conferencing devices is diverse, with multiple vendors contributing to its supply. Because of this diversity, no vendor has enough influence to control or dictate pricing.

Given that the market is relatively mature yet highly competitive, Omdia sees the market evolving through rapid consolidation along the following themes:

- **Product consolidation:** High-quality audio and video are essential for video conferencing, with audio being particularly critical. All vendors have invested in growing their audio and video specialties, leading to modern all-in-one videobars equipped with full-range speakers, high-resolution cameras, microphone arrays, and advanced digital signal processors. Videobar sales are increasing, with Omdia forecasting a 23% CAGR by 2029.
- **Meeting room platform consolidation:** Enterprises are moving towards standardizing on a single UCaaS platform in their meeting rooms, although this is not always ideal. IT departments push for standardization to enhance processes and simplify management, yet employees often use various meeting platforms to take their external meetings with clients, suppliers, partners, etc. While external communication thrives with varied platforms, internal collaboration benefits from a cohesive approach, necessitating a balance in large organizations. Omdia reports that flexible meeting rooms are the most favored setups.
- **Vendor consolidation:** The device market has become commoditized, with roughly 50 vendors providing Android-based videobars. Some are certified for Microsoft Teams and Zoom. Given the rapid commercialization, many are restructuring or diversifying because of minimal differentiation. Vendors are also acquiring AI startups to enhance capabilities, such as HP Poly's acquisition of Humane. The new startups are also introducing AI-powered collaborative solutions.
- **Operating system (OS) consolidation:** Windows-based meeting room systems have benefits, including consistent updates and integration into existing IT policies, eliminating the need for third-party security and management tools. This allows for troubleshooting through a unified interface using systems like Intune and Azure, facilitating familiarity and flexibility in expansion through additional applications for Microsoft Teams Rooms (MTRs) and peripherals. However, Omdia sees a rapid shift to Android-based solutions because of their ease of deployment and improved security and management options. With Microsoft embracing MDEP (Microsoft Devices Ecosystem Platform), Omdia believes the Android-based solutions market will overtake Windows-based deployment in the next two years.

Based on this study, Omdia puts forward the following view of the market in 2025.

Figure 4: Vendor rankings in the Smart Collaboration Devices Universe

Vendors	Products evaluated
Leader(s)	
 Cisco	Cisco video conferencing devices
HP Poly	HP Poly video conferencing devices
Logitech	Logitech video conferencing devices
Neat	Neat video conferencing devices
Yealink	Yealink video conferencing devices
Challenger(s)	
 AudioCodes	AudioCodes meeting room solutions
Barco	Clickshare Conference System
Crestron	Crestron meeting room solutions
Jabra	Conference Cameras
Lenovo	Think Smart Series
Visionary	
 Owl Labs	Owl Labs video conferencing devices

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Source: Omdia

Market leaders

The market leaders (refer to **Figure 4** above) achieved 75% or higher scores in overall solution capability, as was preset by Omdia in advance. Omdia evaluates each capability on a scale from 1 to 5. Regarding strategy and execution, all leaders earned scores exceeding 70%. The leaders also recorded a solution breadth score of more than 79% (solution breadth is a calculated score showing the percentage of all scores recorded as '4' or '5'). The difference between the leaders and challengers is most clearly seen in **Figure 1**.

Market challengers

The market challengers all recorded an overall solutions capability score between 70% and 75% and solution breadth between 50% and 79%. Regarding strategy and execution, some challengers scored equal to the leaders.

Visionary

Owl Labs was the only prospect in this report. The vendor leads with a USB portfolio, so it has done remarkably well in being shortlisted for this Universe and emerging as a visionary.

Opportunities: AI, augmented reality (AR), virtual reality (VR), and 3D rendering

Video conferencing devices help drive productivity and are part of the digital transformation. Organizations are transforming into digital organizations, which involve technology and people change. IT departments can potentially use smart collaboration devices as a vehicle for change. They combine the technology needed to help enterprises become more digital and the technology that could help teams become more collaborative, creative, and productive. Omdia estimates that less than 25% of meeting rooms globally are equipped with video conferencing, indicating considerable potential for vendors to expand and grow.

Integrating 3D technology, AI, AR, and VR into meeting services and devices remains a key opportunity. The debate around AI in the device versus AI in the cloud will not go away, as collaborative meeting services vendors and device manufacturers embrace and monetize AI to enhance employee productivity and experience. Device vendors can reduce network bandwidth requirements by integrating advanced AI capabilities directly into devices. This local processing not only facilitates significant cost savings in bandwidth but also improves latency, security, and privacy. Controlling the device cost by embedding an expensive GPU is not easy. The winners will be the vendors offering affordable, scalable, and robust devices with a long, upgradable shelf life using the software.

Another opportunity is to use advanced AI features in meeting rooms for in-person meetings to enhance productivity and collaboration. AI-powered devices can automate the scheduling of follow-up meetings, note-taking, translation, transcribing, and acting as a facilitator in the meeting, helping with additional insights around the topic of discussion. Additionally, AI can provide insights and analytics on meeting and participant effectiveness, assisting teams in continuously improving their collaboration strategies. These advancements transform traditional meetings into dynamic, efficient, and highly interactive sessions, driving better outcomes and fostering innovation.

Threats: Shifting hybrid preferences, shrinking IT budgets, and security

While returning to the office may alter how video conferencing is used, video communication will remain a significant aspect of communication and collaboration in the changing work environment. Many employees have grown accustomed to the flexibility of remote work, finding it beneficial to maintain a work-life balance and reduce commute times. Companies may adopt a hybrid model that combines in-person and virtual interactions as they navigate this transition. This approach will require video conferencing devices in conference rooms that provide at least an “as good or better” video communications experience than an employee can experience on a laptop. Consequently, video conferencing tools will continue to play a crucial role in fostering team cohesion, conducting meetings, and ensuring productivity across geographically dispersed hybrid-work teams.

IT budgets are decreasing, and the tariff wars will drive device costs higher for end users, particularly for hardware manufactured in China. While this may require video conferencing vendors to adapt, it also provides opportunities to demonstrate the value and cost-effectiveness of their solutions. Android-based solutions are expected to be widely adopted, thanks to their ease of deployment, affordability, flexibility, and seamless experience.

Market outlook

According to Omdia’s *Enterprise Video Conferencing Devices Survey 2024*, most organizations want to scale video capabilities across all types of meeting rooms. This drive to expand and enhance user experience

contributes to the market's continued growth. Periodic room refresh initiatives also stimulate market activity. Key sectors deploying these solutions include government, finance, education, and technology companies, with extensive use by hybrid or full-time in-office employees.

The video conferencing market is relatively mature, although new solutions and technologies intermittently revive this sector. In the last two years, Omdia has seen an influx of AI-driven features, such as active speaker tracking, auto-framing, presenter tracking, background noise elimination, and zone fencing for audio and video. These drive meeting equity to ensure every participant is seen and heard clearly. The collaborative meeting services also offer additional enhancements, particularly meeting transcription and summarization, which are game changers for the collaboration market. The other request from enterprises is for devices that work without manual intervention from the meeting participants and a solution that offers meeting equity. Omdia expects that the products that provide simplification and optimization benefits will not reach a plateau in growth because of the continuous market growth expected in the coming years.

Companies like Microsoft, Cisco, and Zoom are expected to drive the trend of unifying budgets and projects within meeting rooms via their meeting services, leading to a tighter, platform-driven meeting room experience. Refresh cycles for this technology will vary depending on customer size, with enterprises typically refreshing every three years. Conversely, small to medium-sized enterprises (SMEs) may refresh every four to five years. As hybrid work becomes increasingly common, the adoption of smart collaboration devices is also expected to grow. Despite some uneven growth over the past few years, revenue in the video conferencing market increased 10% year-over-year (YoY) in 2024.

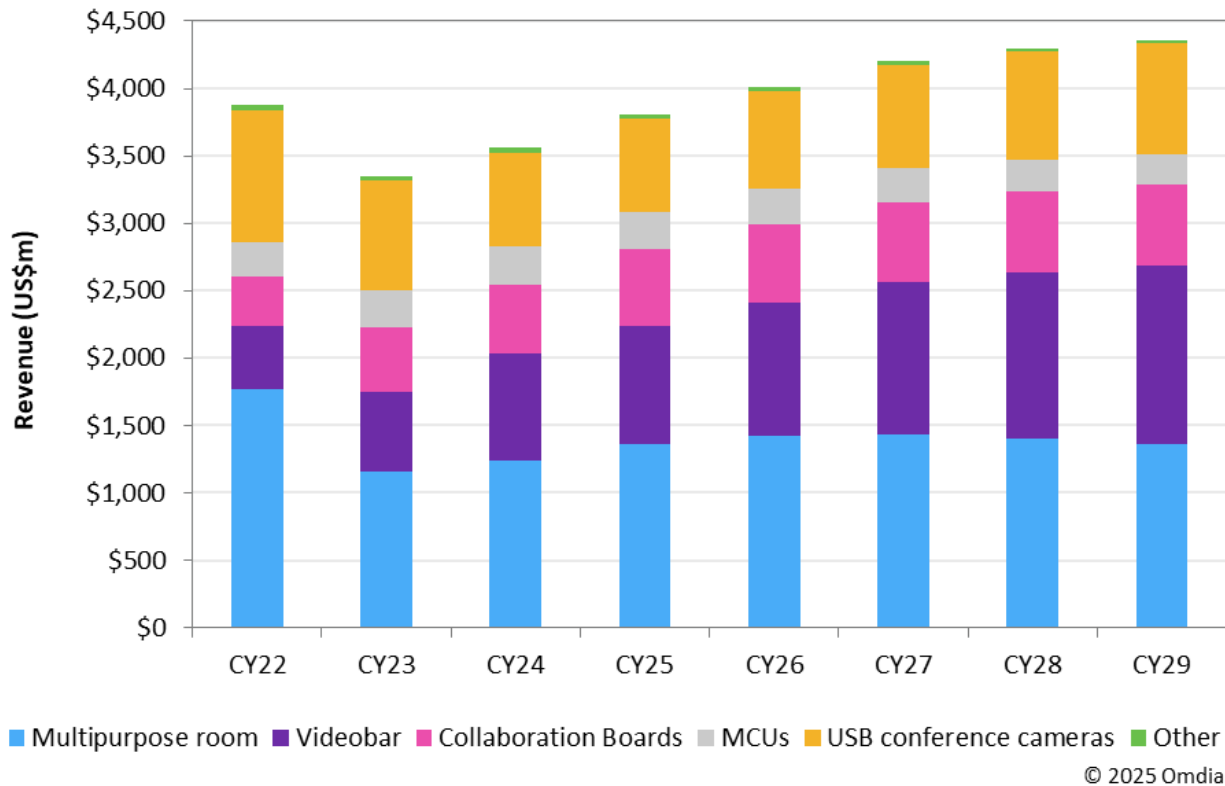
Key factors that influenced the market revenue growth in 2024 were the following:

- Regional wars and economic uncertainty
- Unclear hybrid work strategies
- Price wars, vendor promotions, and discounts
- Growth in plug-and-play videobars and collaboration boards but a decline in expensive dedicated solutions
- Increased adoption of cloud-based services and flexible working
- New video use cases in healthcare (telemedicine), education (e-learning), and government
- Infrastructure revenue lagging behind endpoints as MCU shifts to cloud-based services
- Falling desktop and USB camera revenue

Factors driving the video conferencing market from 2025 to 2029 are:

- Large-scale video deployments in small spaces led by Microsoft's MDEP initiative
- Technology refresh in large meeting rooms
- Enhancing hybrid work experiences with similar video quality and image size regardless of whether someone is in a conference room or joining from a laptop
- Evolving meeting room layouts and multifunctional rooms
- Advances in HD video, AR/VR, bandwidth, and AI for improved user experience
- Industry-specific use cases like telelearning, telemedicine, and banking

Figure 5: Video conferencing devices market size and forecast



Source: Omdia

Vendor reviews

AudioCodes (Omdia recommendation: Challenger)

AudioCodes is a well-established unified communications and collaboration (UC&C) vendor that provides video conferencing room solutions and complementary offerings, such as session border controllers (SBCs), gateways, IP phones, and AI-driven enhancements for contact centers.

AudioCodes should appear on your shortlist if:

- When a business looks for meeting room solutions as part of a comprehensive infrastructure portfolio from one vendor, including built-in security, AudioCodes offers media gateways, SBCs, meeting room devices, IP phones, and contact center solutions. This enables businesses to implement customized, integrated solutions. With extensive networking, VoIP offerings, and smooth device integration, AudioCodes is ideal for those who prefer a single vendor for all their UC&C needs.
- If you seek high-quality products from a vendor that adheres to stringent quality management standards and ensures reliable and secure meeting room solutions.

- If one is seeking AI-enabled functionalities that operate independently of one's UCaaS provider, such as meeting summaries and insights available at competitive prices through the device vendor.
- For a unified Android-based portfolio from one vendor on a single OS, including video conferencing devices for all room sizes, IP phones, and meeting room schedulers, thereby minimizing IT deployment and maintenance costs.

Overview

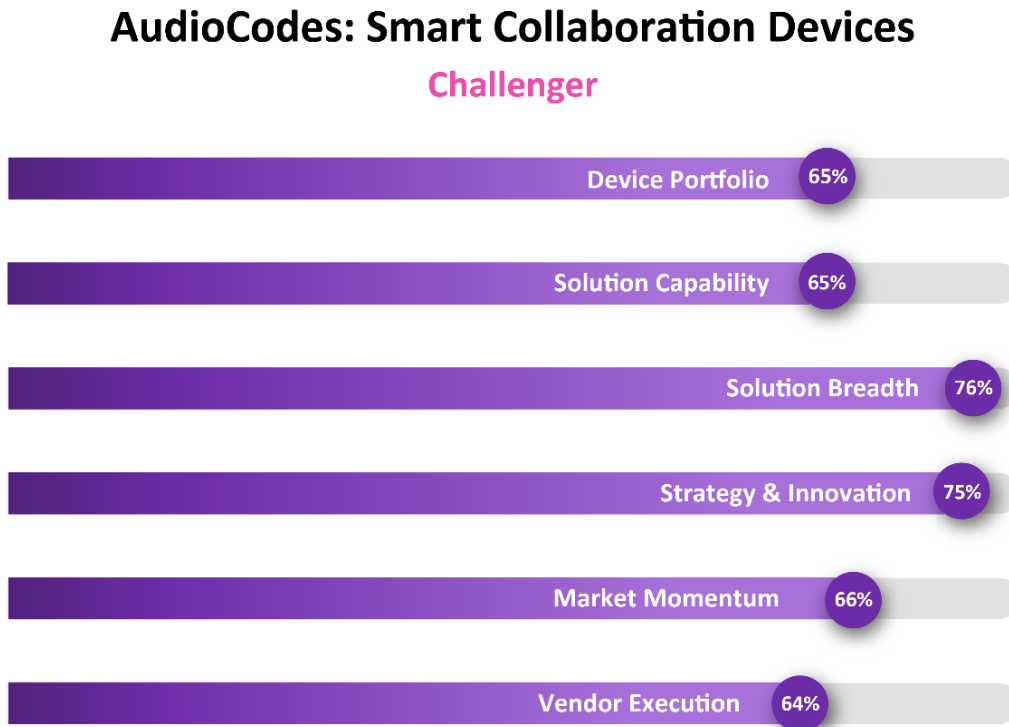
AudioCodes is classified as a challenger in the Omdia Universe on smart collaboration devices with an overall unweighted score of 67% for its capabilities. In comparison, it scored 68% for strategy and execution and achieved a solution breadth score of 76%. AudioCodes is recognized for its diversified UC&C portfolio, which helps the company stand out in a crowded devices market. **Table 1** highlights its portfolio.

Table 1: Portfolio—AudioCodes

Devices	Description
RXV200	Compute
RXV81	Android-based videobar
RX-PAD	Room controller
RX-PANEL	Room scheduler

Source: Omdia

Figure 6: Omdia Universe ratings—AudioCodes



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Source: Omdia

Strengths

AudioCodes stands out in the crowded landscape of UC&C by embracing a comprehensive approach beyond mere meeting room solutions. Recognizing that meeting rooms are a critical piece of a larger infrastructure play, the company excels in addressing the multifaceted UC&C needs of its customers. With a 75% average score in strategy & innovation, AudioCodes has demonstrated a commitment to delivering a holistic solution that includes certified Microsoft Teams Room devices and streamlined network connectivity, SBC, SIP trunking services, IP phones, and advanced AI-driven contact center functionalities. The vendor also provides an AI Summary solution. This cloud-based service can summarize meetings for participants in the room, positioning AudioCodes as the sole vendor in this market to offer a value-added service alongside its devices.

What truly sets AudioCodes apart is its ability to consolidate all the above products and services into a unified offering, effectively addressing the diverse demands of its customers. Many organizations struggle to maximize their ROI from UC&C solutions as various buying centers are scattered across facilities, HR, IT, communications teams, Pro AV teams, etc. Each center operates with its own budget, and this fragmented approach results in high costs to maintain and integrate different systems. AudioCodes views this as an opportunity to help its customers maximize returns from their UC&C stack by assisting customers to have one purchasing order for their UC&C stack. It targets organizations with 3,000–10,000 users, underscoring the value of a single vendor solution that provides enterprise-grade security, scalability, and support.

Its meeting room portfolio scored 65% in this Universe and spans room kits, videobars, USB conference cameras, accessories, and peripherals for small, medium, and large rooms. This portfolio breadth is vital for organizations looking to expand their video capabilities across various environments without the

complications of managing multiple vendors. AudioCodes also scored 80% on integration with Microsoft Teams and customer satisfaction.

Another strength of AudioCodes is its collaboration with both channel and technology partners. The company has established robust integrations with third-party vendors to fill gaps in its portfolio, ensuring quick deployment. Moreover, AudioCodes is one of the few vendors that provides future-ready devices with Android 13 compatibility, AI capabilities, and sustainability. It also scored above average in advanced analytics, monitoring, and management of meeting rooms.

AudioCodes is now embracing MDEP on all Android devices to deliver uniform and secure solutions for Microsoft Teams rooms.

Limitations

AudioCodes faces challenges and opportunities as a relatively new video conferencing device market player. The industry is fiercely competitive, led by several major vendors with substantial market shares, making it difficult for newcomers to establish their presence. A notable issue is that AudioCodes is primarily recognized as an SBC vendor. While this perception is a double-edged sword, limiting AudioCodes' visibility in the video devices space, it also provides a unique edge. AudioCodes' SBCs are extensively used for Microsoft Teams Phone connectivity to the public switched telephone network (PSTN). This enables AudioCodes to offer Microsoft-certified meeting room solutions to its customers, contingent upon successful engagement with the relevant procurement departments within their client organizations.

Barco: (Omdia recommendation: Challenger)

Barco competes in the video conferencing market with its ClickShare product line, which offers wireless presenting and conferencing solutions. Barco's solutions are designed to work with other vendor deployments and complement existing VC rooms, increasing room flexibility. Omdia recommends Barco to organizations wanting to scale video across their estate quickly.

Barco should appear on your shortlist if:

- Your priority is scaling video efficiently and consistently across your organization.
- You seek flexible meeting room solutions that minimize unnecessary costs, including room licensing costs, computing, specialized peripherals, and accessories, reducing your total cost of ownership (TCO).
- You prioritize ease of use, enabling users to join meetings effortlessly using their laptops.
- You want to simplify the deployment of BYOD in small and medium rooms that are not yet equipped with video conferencing.
- If you want a solution that allows IT teams to manage numerous BYOD rooms through Barco's management portal.

Overview

Barco has positioned itself as a formidable challenger in the Omdia Universe report. Although Barco cannot be classified as a traditional video conferencing vendor, it made a mark on this Universe on the strength of its solution's flexibility in accommodating all spaces, from BYOD to large meeting rooms, through a simple and secure wireless conferencing solution. This is an outstanding achievement, considering the vendor competes indirectly in a category dominated by established and legacy players. Barco achieved an overall

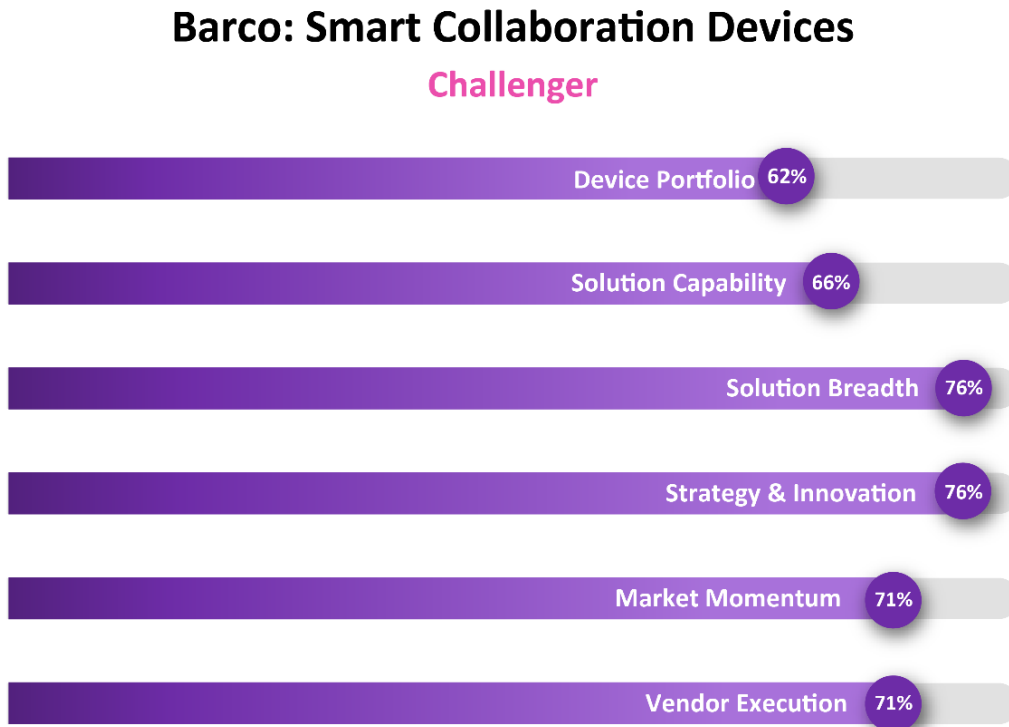
unweighted score of 66% for its capabilities, 76% for strategy and execution, and a solution breadth score of 76%. Its strategy of maintaining a highly differentiated portfolio and collaborating with alliance partners provides multiple routes to the market, facilitating faster growth than its competitors. Another key driver is its strong partnership with Microsoft, which allows it to offer ClickShare alliance program-certified solutions for running Microsoft Teams meetings in a BYOD mode. Additionally, Barco-enabled BYOD rooms can be monitored and managed via the Microsoft Pro management portal, making them IT-friendly. Barco has also committed to Microsoft's MDEP initiative. **Table 1** highlights its portfolio.

Table 1: Portfolio—Barco

Devices	Description
ClickShare Conference CX Series	This wireless video conferencing system for hybrid meetings connects the laptop to the room audio and video equipment.
ClickShare Button	Plug-in device for laptops enables quick connection to conference room equipment.
ClickShare Mobile App	The mobile app enables content sharing from smartphones or tablets, allowing users to wirelessly display content, view the room display on their device, and take snapshots.
ClickShare (Desktop) App	It enables quick wireless video conferencing and content sharing from a laptop. It also offers automatic connectivity to room displays and AV equipment, advanced sharing options, and smart meeting flows.
ClickShare Video Bar Series	These all-in-one devices with integrated wireless conferencing are designed for small meeting rooms and huddle spaces. They offer sharp views and clear audio in hybrid meetings.

Source: Omdia

Figure 7: Omdia Universe ratings—Barco



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Source: Omdia

Strengths: Innovation and collaborative partnership

Barco demonstrates the highest score in small and mid-sized meeting spaces, achieving an 88% subcategory score. A recent Omdia survey shows significant market demand from these environments, where businesses want to expand video capabilities without high costs or room modifications. The ClickShare CX-20 and CX-30 are compact, user-friendly wireless solutions ensuring quick setup, seamless connectivity, and strong security. They integrate with various audio and video systems from ClickShare Alliance Partners. The ClickShare Bar simplifies BYOD deployment in medium-sized rooms lacking video conferencing.

Barco achieved its second-highest score in collaborative meeting service platform support at 87%. ClickShare is compatible with all leading meeting platforms, including Microsoft Teams, Zoom, Google Meet, Cisco Webex, RingCentral, Tencent, and DingTalk. It remains neutral regardless of laptop brands, OS, and peripherals. It supports Apple via the ClickShare Desktop App and ClickShare button for macOS and the ClickShare Mobile App for Windows and iOS. Users can initiate hybrid meetings from their laptops using their preferred collaborative application with the meeting room's audio and video equipment in BYOD mode. Barco's Alliance Partner Program ensures ClickShare devices work with certified third-party audio and video peripherals, verified through in-house testing and alliance partner assessments with quarterly updates. More than 75 industry players participate in this program. The product line runs on a proprietary Linux-based OS with quarterly firmware updates for enhanced functionality, bug fixes, and security. The vendor plans to develop all its future solutions on MDEP. It also offers customizable display wallpapers and digital signage to match customer branding.

Finally, Barco excels in the innovation subcategory, scoring 80%. Omdia values this as Barco entered a competitive market with key challenges:

- 1) Why choose dedicated meeting room solutions over laptops?
- 2) How to ensure meeting security without a heavy investment?
- 3) How to achieve seamless interoperability in video conferencing?

Addressing these, Barco developed a wireless conferencing solution that complements its wireless presentation system, enhancing customer ROI. Users can share and conference via a dongle without connecting to the company Wi-Fi, while employees join meetings through an app. Barco continues to invest in refining its product portfolio, addressing customer pain points, and introducing solutions like the Clickshare Bar, eliminating extra peripherals and allowing cost-effective scaling. This strategy keeps it ahead of industry trends.

Barco also scored above average in product quality, design, ease of use, and scalability in this universe.

Limitations

Barco is a recent entry into the conferencing space, with a relatively limited portfolio as of 2025. Although the product cost may seem higher than similar products, Barco wins based on product quality and customer support. Omdia recognizes that Barco's roadmap looks promising. Several innovations are expected to be released, and the vendor is already committed to MDEP. Introducing a room system could be the next logical step for Barco.

Cisco (Omdia recommendation: Leader)

Cisco presents a compelling AI-driven collaboration portfolio consisting of the Webex service and hardware devices, which combine to provide a streamlined experience.

Cisco should appear on your shortlist if:

- **You want to work with a single vendor for scaling video.** Cisco provides the most comprehensive range of certified solutions for meeting rooms of different sizes, enabling fast scalability and regulated offerings.
- **If you seek exceptional video and audio quality,** Cisco is highly regarded for the quality of its video conferencing solutions based on customer reviews conducted by Omdia.
- **For those seeking an AI-first solution,** Cisco uses NVIDIA GPUs to provide powerful AI features and a solid security framework.
- **For low-touch maintenance,** the Cisco Webex Control Hub offers easy monitoring, provisioning, and in-depth analytics from your meeting room devices.
- **Interoperability is your key focus:** You want an interoperable solution that allows employees to take virtual meetings from any platform.

Overview

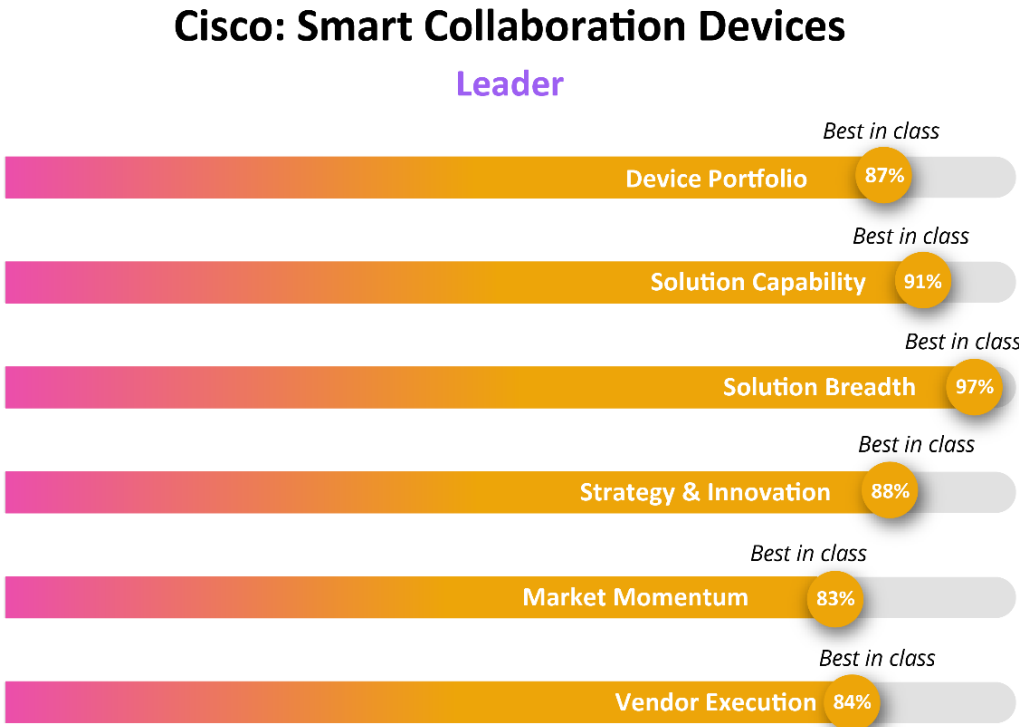
Cisco emerges as a leader in the debut Omdia Universe report on smart collaboration devices. Cisco's "Leader" status is attributed to its exceptional performance across all evaluated categories. The company achieved an impressive overall unweighted score of 90% for its capabilities, 85% for strategy and execution, and a solution breadth score of 97%. **Table 1** details its portfolio.

Table 1: Portfolio—Cisco

Devices	Description
Cisco Desk Series	Portable devices designed for individual workspaces
Cisco Board Series	Interactive touch devices for collaborative spaces
Cisco Room Kit Series	Comprehensive video conferencing solutions for various room sizes
Videobar series	All-in-one videobars for various room sizes
Cisco SIP phone	IP-based phones for high-quality voice communication
BYOD devices	Devices that support BYOD setups for flexible work environments

Source: Omdia

Figure 8: Omdia Universe ratings—Cisco



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Source: Omdia

As **Figure 8** shows, Cisco was identified as the top performer and attained the “best in class” recognition across all categories. Cisco views workplace collaboration as a key component of its overall strategy, encompassing other solutions such as networks, security, and manageability. This end-to-end offering enhances its appeal and differentiates its value proposition from every other vendor in the industry. According to Omdia’s *Enterprise Unified Communications and Voice Equipment Market Tracker – 4Q24 and*

CY24 Data and 2025–29 Forecast, Cisco led the video conferencing devices market with a 24% market share in 2024, and its revenue was up 10% YoY.

Strengths: A strategic approach and innovation with an AI-driven portfolio

Cisco's greatest strength lies in its portfolio, which is enhanced by strategic integrations with complementary technologies, solutions, and platforms. Cisco scored 97% on solution breadth in the Omdia Universe. Compared with other vendors, Cisco devices provide extensive integration capabilities, including always-on people counting, presence detection, and environmental measurements. They connect with Cisco and third-party audio equipment for enhanced features and support various productivity applications for workplace transformation, including room booking and digital signage. Tools like Workspace Designer and Control Hub are embedded within the Webex ecosystem, and the devices offer native integration with Cisco Webex and Microsoft Teams, while supporting additional platforms through enhanced SIP and WebRTC protocols.

Cisco's second strength is its solution depth, offering a range of controls, ease of deployment, management, sustainability, and customization options. Cisco scored 94% on solution depth. Many of its devices are designed for portability and are compatible with Android 13, making them future-ready. The solution equips administrative staff with advanced analytics to facilitate easy monitoring and management of meeting spaces.

Cisco's third strength is its solution features, particularly AI features, where the vendor scored a subcategory score of 90%. Cisco incorporates NVIDIA technology into its devices, facilitating the provision of scalable, high-performance, and secure AI features. The AI Assistant for Webex meetings that Cisco developed can record transcripts and deliver summaries that include actionable items. Other AI features encompass virtual backgrounds on Desk devices, immersive sharing for engaging presentations, dynamic group framing, close-ups of active speakers, and intelligent framing. Cisco also offers a cinematic and immersive environment in high-impact spaces.

Overall strategy and execution

The vendor's roadmap looks promising, enhancing and addressing gaps in its portfolio in the next 12 months. Cisco's new pricing and investment protection are also designed to ensure a lower total cost of ownership for Cisco devices, making their solutions cost-effective and easy to manage. Cisco has invested significant effort in collaborating closely with its channel partners, refining its GTM strategy, and ensuring its devices work seamlessly with Microsoft Teams. Additionally, Cisco's devices are now easy to procure globally and can be provisioned, managed, and deployed from the Cisco Control Hub.

Limitations

Omdia notes that Cisco's revamped video collaboration solutions function seamlessly with Webex and Microsoft Teams. However, Cisco's legacy reputation affects customer perceptions, leading some to believe its devices are old, expensive, high-end products with complex licensing and procurement processes. Cisco informed Omdia that its devices are readily available at competitive pricing through its channel partners. The other limitation is that Cisco currently only provides solutions for modular spaces, using macros and partner-led offerings rather than a native offering. However, the vendor confirms that this is something on its product roadmap.

Crestron (Omdia recommendation: Challenger)

Crestron meeting room solutions use AI to automate the room experience and video conferencing, enhancing user experiences in corporate boardrooms, conference rooms, and classrooms. They also offer flexible solutions for small and mid-sized spaces.

Crestron should appear on your shortlist if:

- **You need a comprehensive suite of meeting room solutions.** Crestron offers a full range of products for meeting rooms of all sizes, including compute, meeting controllers, tabletop solutions, cloud-based monitoring and management, and advanced video conferencing systems for high-impact spaces.
- **You have specific customization requirements.** Crestron is ideal for complex, large, and high-impact spaces. The vendor is recognized for its engineering excellence and extensive customization.
- **You require extensive customer service and support.** Crestron offers comprehensive global customer service and support, ensuring reassurance whenever and wherever needed.

Overview

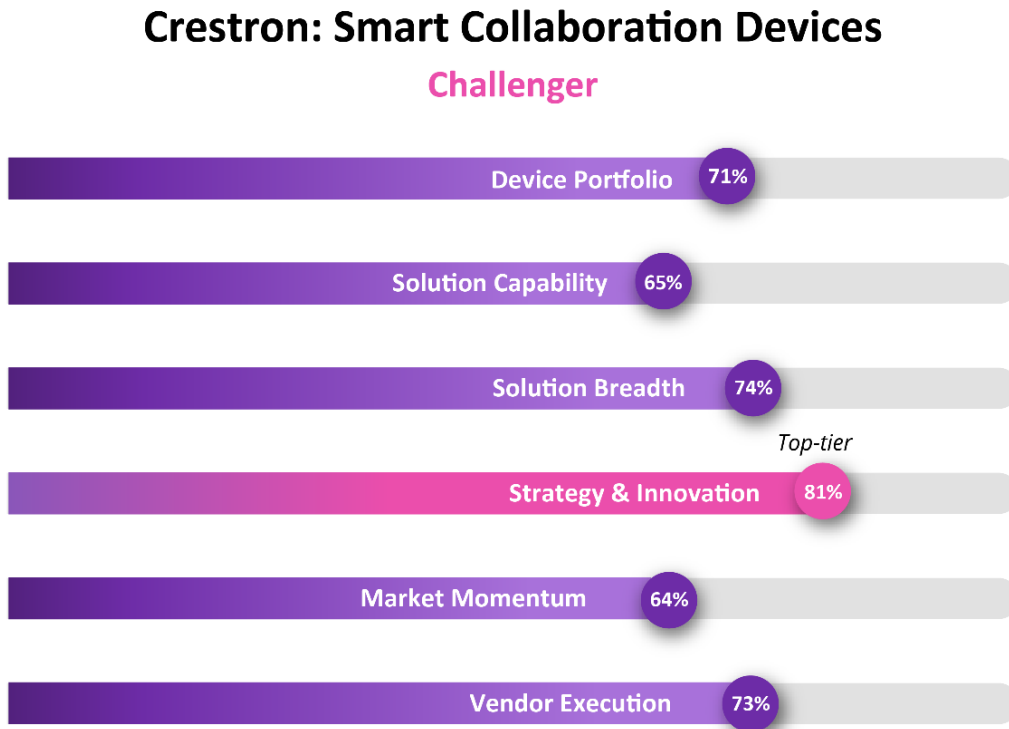
Crestron is classified as a challenger in the first Omdia Universe on smart collaboration devices. Crestron received an unweighted capability score of 69%, a strategy and execution score of 74%, and a solution breadth score of 74%. Overall, Crestron's performance is solid; it achieved the top scores in the large and high-impact spaces where Crestron systems provide enhanced features and deep integration functionalities that other vendors struggle to match. As Crestron enhances its portfolio for small and huddle spaces, it is expected to advance toward becoming a leader in future Omdia Universe reports.

Table 1: Portfolio—Crestron

Devices	Description
Crestron Flex	A comprehensive video conferencing solution for various room sizes, offering high-performance audio/video, easy access to video conferencing, wireless conferencing, and smart room control
Automate VX and the 1 Beyond Camera system	A multi-camera speaker tracking solution that enhances meeting effectiveness by providing dynamic views of the room
Videobar 70	An all-in-one Android-based collaboration bar designed for medium to large rooms
Crestron M-Series	A tabletop solution for video conferencing featuring integrated audio and video capabilities
XiO Cloud	Cloud-based monitoring and management platform for efficient system deployment, proactive monitoring, quick response to changes and issues, and data-driven optimization of meeting spaces

Source: Omdia

Figure 9: Omdia Universe ratings—Crestron



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Source: Omdia

Strengths

Crestron scored an impressive score of 81% in strategy & innovation, evolving its portfolio to capture market share in both large and mid-sized environments. Having a firm place in the high-impact meeting room segment, Crestron strategically enhanced its portfolio for small and mid-sized rooms and introduced its wireless conferencing and presentation solutions and Android-based all-in-one videobar. It also enhanced its portfolio with features like presenter tracking and dynamic composition for immersive meetings. The Crestron Flex platform offers flexibility as it integrates with cameras from partners like Jabra and Huddly. Its 1 Beyond camera lineup optimizes group framing with visual AI, while high-impact room solutions ensure deep integrations with room controls. By leveraging partnerships, Crestron is further expanding its market share. The vendor remains an open ecosystem that allows its channel partners and professionals in the field to make systems that solve end users' needs.

One of Crestron's strategic advantages over others in the market is its advanced control systems, which enhance automation and provide intuitive experiences where users manage AV, lighting, and climate from one unit. For this reason, Crestron scored an impressive 97% in the large and complex space deployment subcategory. Going forward, Creston plans to introduce new AI-led innovations, showing its commitment to its customers.

Crestron's third most significant strength is its product quality, which received a commendable score of 80%. The company is widely recognized for the superior quality of its meeting room devices. Customers appreciate the quality of integrated technology that effectively streamlines audio, video, lighting, shades, and climate control, enhancing the overall meeting experience. Omdia's *Enterprise Video Conferencing Devices Survey 2024* shows that customers prioritize the reliability and usability of meeting room products,

attributes that Crestron consistently delivers. This significantly improves productivity and collaboration in Crestron-enabled corporate boardrooms, conference rooms, and classrooms.

Limitations

Given Crestron's engineering focus, its products are often perceived as challenging to deploy. However, the company has been steadily introducing devices that work out of the box, such as the Videobar 70, soundbars, mic pods, and Crestron Flex units. Omdia believes that Crestron's most significant limitation is also its greatest strength. Solutions requiring SI deployment support enable Crestron to leverage its extensive partner ecosystem to reach the market effectively. This approach ensures clients receive tailored, high-quality installations that enhance employee experience and productivity. Further, this strategy opens opportunities in the existing accounts to cross-sell solutions for small and mid-sized spaces where the vendor continues to improve its portfolio.

HP Poly (Omdia recommendation: Leader)

HP Poly offers a comprehensive portfolio of high-quality meeting rooms and global collaboration solutions for hybrid work. Its solutions span a range of price points that appeal to a broad set of enterprises in various verticals. Its devices offer AI-enhanced video and audio and allow for centralized management.

HP Poly should appear on your shortlist if:

- **You value innovative technology that is easy to use.** Advanced audio and video solutions offering simplified setup and use.
- **Your needs are varied, and you would like a broad selection of options.** HP Poly offers a complete portfolio of group and personal collaboration tools, including headsets and video conferencing systems that consistently deliver high-quality experiences.
- **You require certified devices for compatibility with various meeting services.**
- **You appreciate global reach.** HP Poly is an ideal partner for large healthcare, technology, education, or finance corporations, offering extensive solution availability and professional services.
- **You prioritize quality.** HP Poly delivers high-performance and reliable products.

Overview

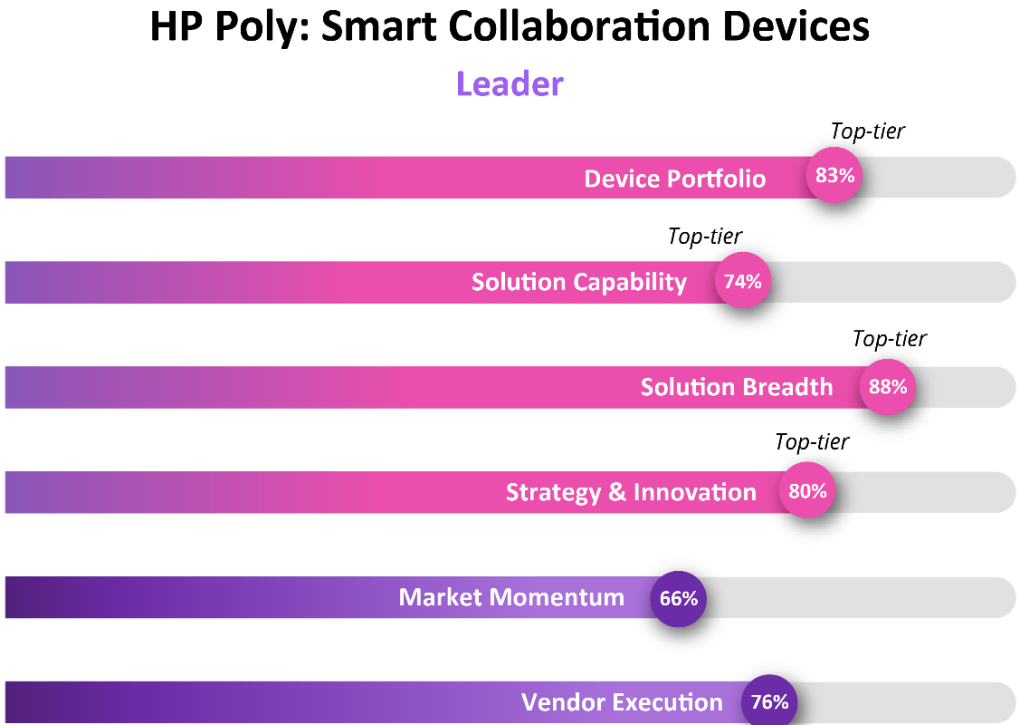
HP Poly is acknowledged as a leader within the Omdia Universe on smart collaboration devices, possessing an unweighted capability score of 80% and a matching strategy and execution score of 80%. Its solution breadth achieved a score of 88%. HP Poly demonstrates a notable advantage in portfolio breadth by offering solutions based on Windows and Android platforms, SIP/H323 endpoints, videobars, and personal collaboration tools, such as headsets and webcams. The organization stands at the forefront of innovation, attaining high scores across five of the nine subcategories. Furthermore, HP Poly exhibited the most consistent performance across other subcategories, scoring above average.

Table 1: Portfolio—HP Poly

Devices	Description
Poly Studio X Series	All-in-one videobars for various room sizes with built-in conferencing software
Poly G Series	Modular systems for large rooms, connecting to third-party components
Poly Studio P Series	Personal devices for professional-quality audio and video
Poly Trio Series	Advanced audio solutions for conference rooms
Poly Studio USB Series	Plug-and-play USB video conferencing solutions
Poly Studio Base Kit	PC-based solutions with AI-driven audio and video technologies
Poly Cameras and Accessories	Enhancements like cameras, carts, microphones, and touchscreens

Source: Omdia

Figure 10: Omdia Universe ratings—HP Poly



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Source: Omdia

Strengths

HP Poly is recognized for its extensive and comprehensive product portfolio, scoring 83% in this category. This gives HP Poly a distinctive advantage and uniquely positions it in this competitive market. Depending on customer preferences, the company offers solutions for rooms of all sizes, encompassing Windows, Android, SIP/H323, and USB-based solutions. HP Poly ranked the highest in this study for providing solutions for large and modular rooms with integration with third-party providers for audio and room controls. The vendor offers Windows and Android solutions for these rooms, with its X72 premium bar or E70 camera paired with the HP Mini IP conferencing PC on Windows or Poly G7500.

HP Poly's other most significant strength lies in its monitoring and management capabilities (a subcategory), achieving a score of 91%. The company provides Poly Lens, a cloud-based solution that delivers Poly device insights and management vital to optimizing workplace experiences. Poly Lens integrates with HP's management platform, WXP, enabling provisioning, monitoring, and management across HP's broader portfolio within enterprises. Furthermore, HP Poly's acquisition of Vyopta enhances its ability to deliver customized monitoring and management solutions to a varied customer base that uses multiple UC platforms and collaboration devices from different vendors. This consistent platform for comprehensive monitoring, management, and provisioning represents a valuable advantage for HP Poly.

HP Poly also scored above average on innovations, as the company sees itself as not following the typical developments in the industry and bringing similar products, but rather those that can provide a competitive advantage and help it differentiate itself. One example of HP Poly's strategic direction is Project Starline, for which HP Poly provides hardware solutions to Google and Zoom.

Limitations

Omdia believes that the integration and reorganization following HP's acquisition of Poly have led to temporary operations and strategy alignment disruptions, resulting in limited market growth since 2021. The other limitation is that HP Poly's portfolio excludes collaboration boards, which is the only missing piece; however, the vendor prefers to partner with other display providers instead of creating its display-based offering. Historically, HP Poly has not focused heavily on evolving its channel strategies. The vendor is now addressing these issues with an increased emphasis on channel-led sales and efforts to shift brand perception, aiming to overcome these obstacles and expand its customer base.

Jabra (Omdia recommendation: Challenger)

Since 2019, Jabra has forayed into the video conferencing market, providing a well-designed and AI-enhanced array of solutions for group and individual collaboration, further augmented by its cloud-based monitoring and management system.

Jabra should appear on your shortlist if:

- **When you want to make the most of your available spaces**, Jabra video conferencing cameras, specifically the PanaCast series, offer a 180-degree field of view and are among the best in the industry. This wide-angle view allows the camera to cover much of the room with a single camera system to ensure all participants are included.
- **If audio quality is your top priority**, Jabra is renowned for excellent audio quality solutions. It offers features like HD voice for crisp, clear calls and advanced noise cancellation technology to eliminate background noise.

- Jabra’s solutions suit BYOD rooms and small to medium spaces **if your main focus is supporting a hybrid workforce**. Its personal collaboration tools, including enterprise-grade headsets and webcams, further enhance the vendor’s overall value proposition.

Overview

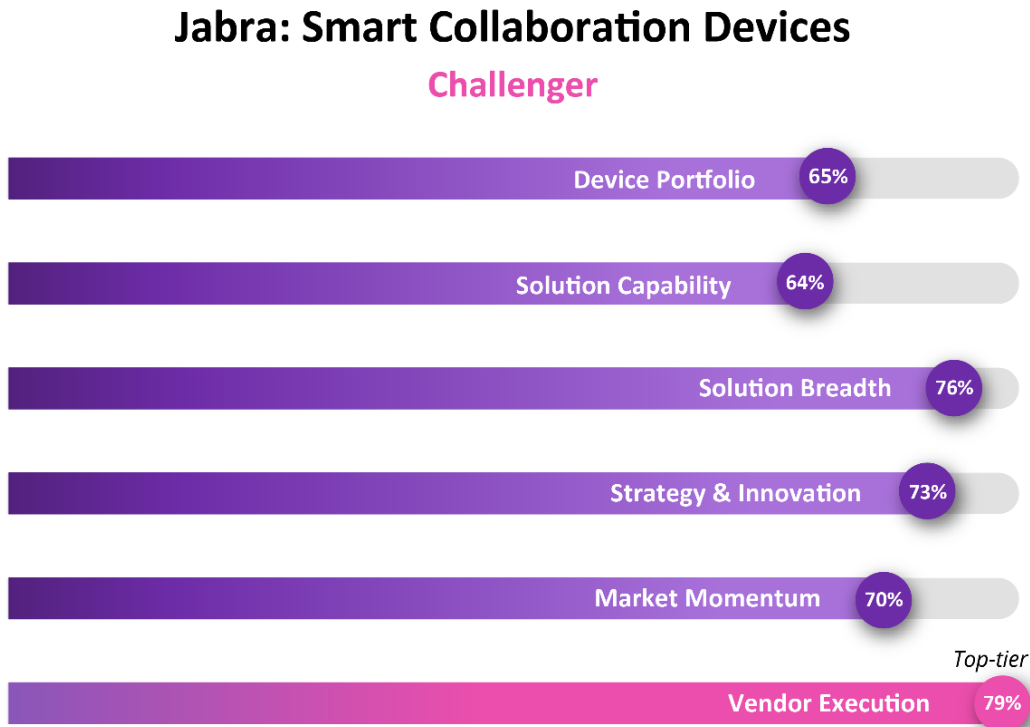
Jabra is classified as a challenger in the Omdia Universe on smart collaboration devices with an overall unweighted score of 66% for its capabilities. In comparison, it scored 73% for strategy and execution and achieved a solution breadth score of 76%. In this study, Jabra is recognized for its excellent audio and video quality and balanced portfolio of BYOD, Windows Room System, and Android-based videobars for small and mid-sized rooms. Jabra is a relatively new player in the video conferencing space, and Omdia appreciates the progress the vendors have made since it acquired Panacast in 2019. **Table 1** highlights its portfolio.

Table 1: Portfolio—Jabra

Devices	Description
PanaCast 50 VBS	An all-in-one videobar room system with AI enhancements and onboard Android compute
PanaCast 50 Room System	A Windows-based complete room system engineered for hybrid teams
PanaCast 50	An intelligent USB conference room camera
Jabra+	A cloud-based device monitoring and management solution It operates independently or alongside platforms like Microsoft Pro Management Portal and Zoom Device Manager
PanaCast 40 VBS	A newly announced Android-based videobar for small meeting rooms (not yet available)
Other complementary solutions	Headsets, webcams, accessories, and speakerphones

Source: Omdia

Figure 11: Omdia Universe ratings—Jabra



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Source: Omdia

Strengths

Jabra performs well in the small rooms and mid-sized space subcategories, scoring 92%. The company also excels in the BYOD subcategory with a score of 90%. Its solutions in these spaces appeal, thanks to its advanced audio and video technologies, intelligent AI features, and user-friendly design. As a leader in professional audio, Jabra offers adaptable HD sound for clear communication. The vendor also releases continuous software updates and firmware upgrades to ensure customer value and that new platform-led features do not require hardware changes. Jabra solutions are certified for Zoom and Microsoft, facilitating compatibility and easy integration.

Additionally, Jabra excels in the vendor execution category, earning a top score of 79%. It also excels in customer experience, partnerships, ecosystems, and product quality. Jabra scored above average in these domains, underscoring the vendor's strategic efforts to establish itself as a top-tier vendor and an ecosystem player. Its partnerships with Crestron, Lenovo, and others further enhance its position.

Its third leading score is in strategy & innovation, with 73%. The vendor demonstrates rapid innovation, as shown by its collaboration portfolio's diverse and enhanced feature sets. In addition, new products are being launched to capture market share in the expanding BYOD and small spaces segments. The recently announced solution, the PanaCast 40 VBS, stands out as the only small-space Android bar that captures the entire room with its unique 180-degree field of view and superior audio capabilities. Moreover, the system promotes meeting equity through outstanding video and audio clarity and supports quick setup, allowing for the provisioning of the device even before installation.

Limitations

Jabra's video conferencing portfolio is advancing quickly, although there are a few gaps, such as in large rooms and high-impact spaces. Jabra must also enhance market awareness regarding its products and cultivate a comprehensive channel strategy to effectively engage with prospective enterprise clients in BYOD rooms and small to mid-sized environments.

Lenovo (Omdia recommendation: Challenger)

Lenovo provides a comprehensive portfolio of Windows-based video conferencing solutions that are particularly well-suited for deployments necessitating enhanced control within Microsoft Teams and Zoom environments. The vendor offers integrated room kits, including a compute, camera, and controller, all supplied by a single vendor.

Lenovo should appear on your shortlist if:

- **You need flexible room kits.** Lenovo offers modular solutions like the ThinkSmart Core + Controller Kit, which can be mixed and matched with any USB camera, microphone, or speaker.
- **You value a strong market presence.** Lenovo's established brand name, diverse product range, innovative technology, and reliable performance make it a preferred choice for many businesses worldwide.
- **You seek comprehensive support.** Lenovo provides deployment, management, and premier support. Design and Access services are also available for project management.
- **You value Windows-based deployment.** Although there has been a significant influx of Android-based solutions, many enterprises still prefer a Windows-based offering for enhanced flexibility, security, and management.

Overview

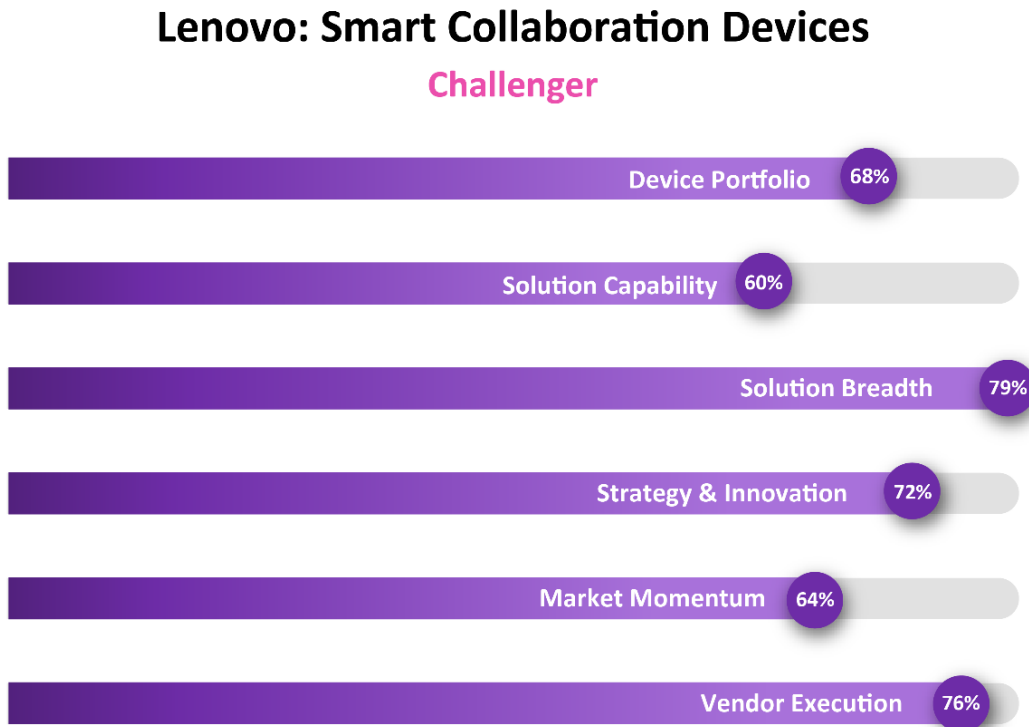
Lenovo is classified as a challenger in the first Omdia Universe on video collaboration devices, achieving 67% for capabilities, 72% for strategy and execution, and a solution breadth score of 79%. Lenovo is uniquely positioned in the market as one of the few vendors that provide complete room kits and offer standalone compute for Microsoft Teams and Zoom rooms. Consequently, many USB camera vendors, such as Logitech and Jabra, partner with Lenovo to provide complete room bundles for meeting rooms of various sizes. **Table 1** highlights its portfolio.

Table 1: Portfolio—Lenovo

Devices	Description
ThinkSmart Core	Core Intel vPro Windows-based compute
Lenovo IP Controller	A tabletop control unit that enables touch-enabled meeting controls
ThinkSmart Bar	A USB camera and soundbar for mid-to-large room deployment
Lenovo ThinkSmart View Plus	An all-in-one desktop solution with a detachable 4K camera and a premium soundbar
ThinkSmart One	A Windows-based all-in-one collaboration bar Designed for small to medium meeting rooms, the ThinkSmart One runs Windows 10 IoT Enterprise and is powered by an embedded 11th Gen Intel® Core™ processor
ThinkSmart manager	It remotely manages and protects the ThinkSmart device fleet

Source: Omdia

Figure 12: Omdia Universe ratings—Lenovo



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Source: Omdia

Strengths

Lenovo's topmost strength was in the solution breadth category, where the vendor scored above average (79%) as it brings a range of AI-enhanced offerings to meeting rooms of various sizes. Lenovo showcases a diverse portfolio, providing solutions for small, large, and high-impact spaces.

The vendor also scored 72% in strategy & innovation, ushering it into the challenger position in this universe. Lenovo is well-known for offering optimized compute for meeting rooms that can be used with USB cameras and other peripherals to create a room system. The vendor recently announced the Lenovo ThinkSmart Core Gen 2, one of the first AI-optimized computing devices built to run video conferencing room systems. Powered by the Intel® Core™ Ultra processor with an integrated NPU, the ThinkSmart Core Gen 2 is ready for AI-heavy meeting room workloads for intuitive collaboration and enhanced productivity, packed in a user-friendly unit that is quick to deploy.

Lenovo's wide range of professional services, extensive support, and remote manageability distinguish it from its competitors. Lenovo also wins because of its Windows-based room kits and all-in-one videobar expertise. Lenovo is the only vendor that brings such a device to the market; Windows-based solutions are preferred by enterprises that have standardized on Windows and want to have the enhanced manageability and security that comes with Windows-based computing. Lenovo's systems are also known for their reliability, flexibility, and security.

Lenovo achieved a score of 76% in vendor execution. This was partly due to its strategic partnerships with platform providers and other hardware vendors, which helped create product bundles and complementary solutions.

Limitations

Lenovo's dominance in the compute market has pros and cons. Many enterprises prefer a single vendor for all end user devices. Thus, Lenovo's diversification allows cross-selling to large accounts. However, its strong reputation for laptops and PCs may overshadow its video conferencing products. Its marketing for meeting room solutions might not be as aggressive, leading to less awareness of its features. Despite this, Lenovo is progressing, and its market share is projected to grow over the next two years.

Logitech (Omdia recommendation: Leader)

Logitech provides one of the broadest portfolios of affordable and certified meeting room and personal collaboration solutions, enhanced through Logitech Sync, its cloud-based monitoring and management solution.

Logitech should appear on your shortlist if:

- **You want a consistent market leadership portfolio.** Logitech has significantly strengthened its position within the business-to-business (B2B) market by developing its collaboration portfolio, swift innovation, and a robust competitive strategy.
- **You need global availability and support.** Logitech offers wide availability across geographies and a trusted 24/7 customer support system.
- **You prioritize sustainability.** Logitech excels in providing sustainable solutions, holding the number one spot in the Omdia Universe for sustainability.
- **You seek future-proof technology.** Logitech's collaboration solutions are built with advanced AI capabilities and features to ensure relevance and practicality as communication needs evolve.

Overview

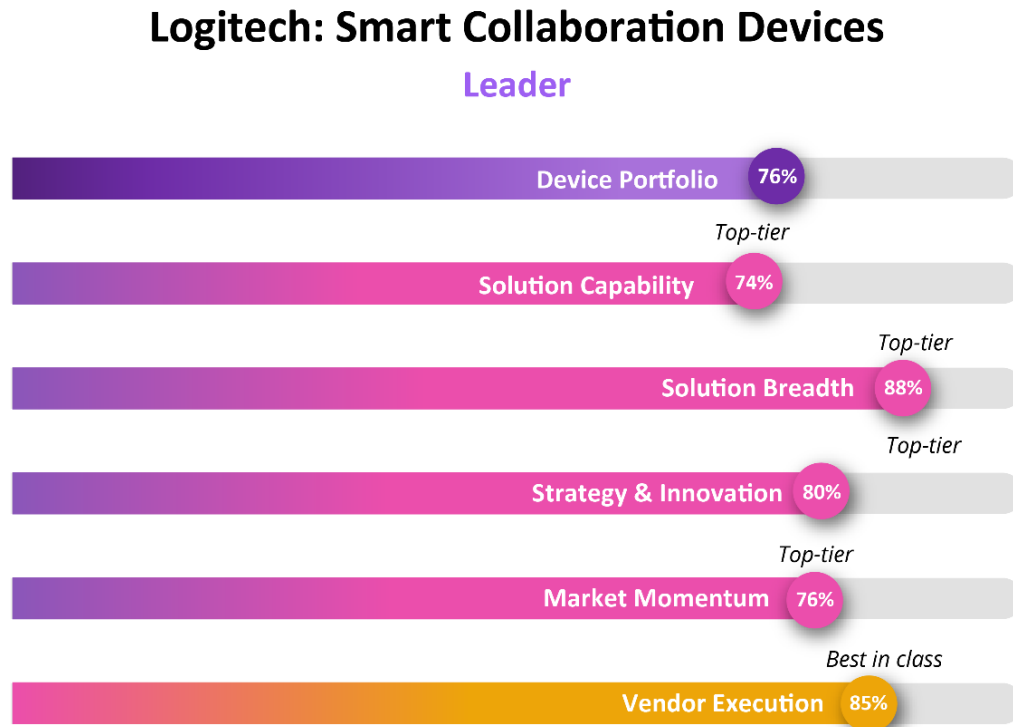
Logitech emerges as a leader in the 2025 Omdia Universe report on video conferencing devices. Logitech's "Leader" status is attributed to its high performance across all evaluated categories. The company achieved an impressive overall unweighted score of 78% for its capabilities, 80% for strategy & innovation, and a solution breadth score of 88%. Logitech has intensified its focus on the B2B division under the new leadership of Prakash Arunkundrum, President of Logitech for Business. The company is driving growth with a key focus on product innovation, sales growth, tech partnerships, and a deep focus on sustainability. According to Omdia's *Enterprise Unified Communications and Voice Equipment Market Tracker – 4Q24 and CY24 Data and 2025–29 Forecast*, Logitech is one of the prominent vendors in the video conferencing space, with a 12% market share in 2025, and its revenue was up 5% YoY. **Table 1** highlights its portfolio.

Table 1: Portfolio—Logitech

Devices	Description
Rally Series	All-in-one videobars and modular systems for various room sizes featuring advanced audio and video capabilities
MeetUp Series	A compact all-in-one conference camera for huddle and small rooms, designed for easy setup and use
Tap Series	Touch controllers for meeting rooms, supporting various conferencing platforms and efficient room management
RoomMate Series	A CollabOS (Android) appliance for supported conference cameras and room solution peripherals
Scribe, SWYTCH, Dock Series	A whiteboard camera for video conferencing rooms, a device to connect a laptop to the room system's AV equipment, and an all-in-one docking station with meeting controls, speakerphone, and USB connectivity
Sight	A tabletop companion camera with intelligent multi-participant framing
Logitech Sync and Options+	Management, monitoring, and customization apps

Source: Omdia

Figure 13: Omdia Universe ratings—Logitech



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Source: Omdia

Strengths: A broad portfolio focused on delivering customer satisfaction

Logitech demonstrates strong portfolio breadth with a score of 76%, offering solutions from small rooms to high-impact spaces that could be deployed quickly with low-touch provisioning. This is crucial for organizations seeking to scale video affordably across various spaces without the drawbacks of multi-vendor setups. Omdia's *Enterprise Video Conferencing Equipment and Service Survey*, published in 2023, revealed enterprises prefer a single vendor for all video conferencing needs. Its design-led approach and provision of point solutions for customer use cases—such as the Logi Dock, webcams, UC&C headsets, Logi Spot, and Logi Whiteboard camera (Scribe)—make Logitech a reliable choice when enterprises need flexibility and a broad range of supplementary meeting room solutions. Logitech continues to evolve with the launch of innovative devices such as Logi Sight and Logi Rally Board 65 in 2025.

Logitech also achieved an 85% rating in vendor execution, earning recognition as a best-in-class provider for its excellence in delivering customer experience and fostering a broad ecosystem partnership. Furthermore, it has delivered consistent enterprise-grade performance and reliability, enhancing its reputation as an enterprise vendor. Logitech's products are affordable and designed for immediate use, offering integration with third-party compute, audio solutions, and accessories. The company also received above-average marks for customer service and customer satisfaction.

Logitech earned an 85% rating for its sustainability efforts (a subcategory), establishing itself as one of the frontrunners in the video conferencing industry with products that help customers meet their carbon objectives.

Logitech achieved a notable 75% in the AI features and functionality subcategories, demonstrating its commitment to delivering AI tools for collaboration. Its AI technologies for audio and video enhancements, such as RightSight2 and RightSound2, have helped customers derive a better user experience. Logitech optimizes its offerings with regular software updates to meet users' evolving needs.

Limitations

Logitech has diversified its product offerings but currently lacks solutions for modular rooms. While it is well-known in the consumer market, it needs to enhance its presence within the B2B sector further. Historically, Logitech faced substantial competition because of a lack of emphasis on channel strategies. To mitigate this challenge, Logitech is now prioritizing channel-led sales initiatives.

Neat (Omdia recommendation: Leader)

Neat is a recognized video conferencing device vendor and has steadily enhanced its market position with a highly differentiated portfolio focused on user-friendliness and appealing design.

Neat should appear on your shortlist if:

- If you aim to transition from conventional meeting rooms to easy-to-use, collaborative spaces that can be tailored to meet the needs of your workforce.
- If you are looking for a vendor dedicated to product quality and customer satisfaction, Neat provides businesses with peace of mind by addressing customer issues promptly.
- You want secure multi-purpose devices that are not just meeting devices but can be used with other workplace productivity apps like Miro, klaxon, and LucidSpark, a capability that very few vendors in the industry can rival.
- You want a comprehensive range of attractive, simple, and user-friendly VC solutions. Neat offers collaboration boards, personal devices, videobars, and center-of-table cameras.

Overview

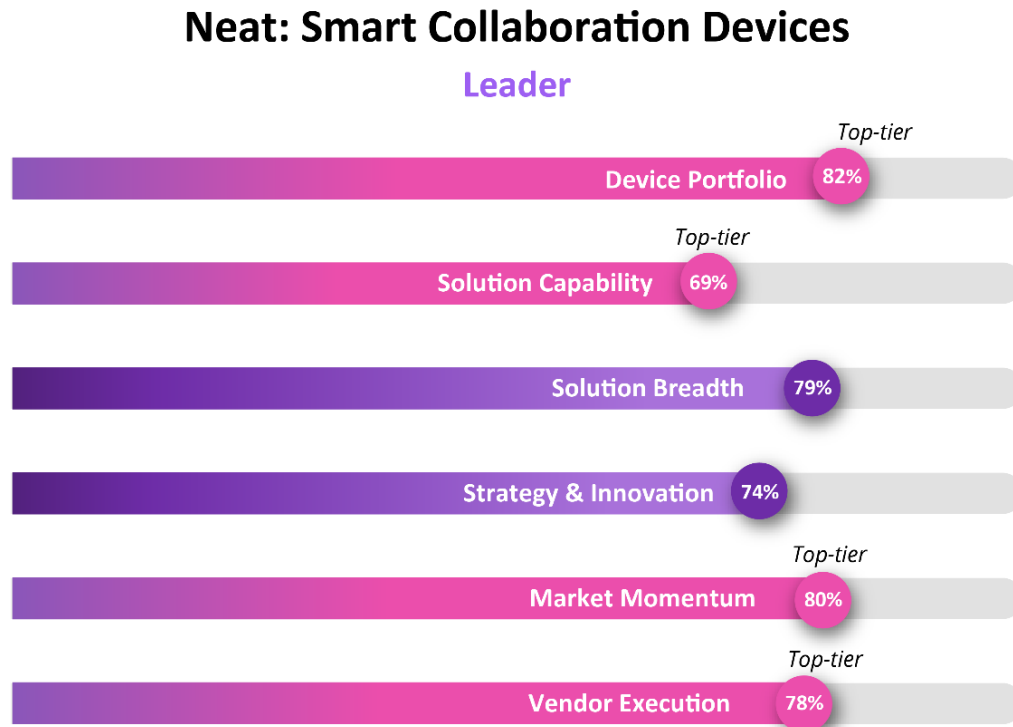
Neat is classified as a leader in this Omdia Universe with an overall unweighted score of 75% for its capabilities. In comparison, it scored 74% for strategy and execution and achieved a solution breadth score of 79%. Neat is recognized for its well-rounded portfolio, which helps the company stand out in a crowded market. Neat had approximately 8% market share in the videobar segment and 12% in the collaboration board segment in 2024. **Table 1** highlights its portfolio.

Table 1: Portfolio—Neat

Devices	Description
Neat Bar Generation 2	A videobar for small meeting spaces
Neat Bar Pro	A videobar for larger rooms
Neat Board Series	A collaboration device with a touch screen and a camera
Neat Frame	A video device for personal workspaces and visitor management
Neat Pad	A touch screen controller for meetings It could also be used outside the meeting room as a scheduler for room bookings
Neat Pulse	A service with device deployment, support, and warranty
Neat Select	Neat Select is a centrally manageable solution that enables Neat Bar and Neat Bar Gen 2 to operate as a dedicated BYOD-only device

Source: Omdia

Figure 14: Omdia Universe ratings—Neat



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Source: Omdia

Strengths

Neat achieved an impressive score of 82% for its portfolio, marking it as one of the few providers supplying devices suitable for all collaboration spaces, from huddle rooms to open areas. Devices like the Neat Board and Neat Pad merge design with streamlined cabling and touchscreen interface capabilities. The Neat Board 50 is a flexible video collaboration tool that can be easily moved for accessibility. The Neat Frame is a personal, portrait-oriented video meeting device that supports workplace management and digital signage through the Neat App Hub.

Neat's second-highest subcategory score is monitoring and management, scoring 87%. Its solution, Neat Pulse, stands out among competitors for several reasons. It offers comprehensive device monitoring, including real-time status reporting, room occupancy tracking, and air quality monitoring, ensuring optimal performance of meeting spaces. IT administrators benefit from remote management capabilities, allowing them to control, configure, and update Neat devices efficiently. Bulk actions such as updates, restarts, and log retrieval for multiple devices simultaneously save time and effort. Secure access features like single sign-on, audit trails, and role-based administrative access enhance security and control. Additionally, Neat Pulse provides premium support with priority queuing for technical assistance and rapid device replacement, ensuring minimal downtime.

Neat's third strongest subcategory is smart integrations, scoring 83%. The Neat App Hub brings essential apps directly to Neat devices and is accessible through Neat Pulse for centralized management. Neat devices also feature built-in sensors for room environmental information through Neat Sense, which measures room utilization and environmental factors. Neat partners with Shure for enhanced audio in large

and acoustically challenging spaces. Neat also collaborates with furniture manufacturers to design efficient office spaces.

Limitations

Neat solutions offer innovative features but lack options for custom kits and integration with third-party devices. While Neat customers prefer clutter-free solutions, challenging rooms or high-impact spaces may benefit from open systems that are easily customized depending on room layouts. However, Neat devices are evolving rapidly, and the company plans to add new solutions for larger spaces.

Owl Labs: (Omdia Recommendation: Visionary)

Owl Labs is an emerging provider of video conferencing solutions designed for small, medium, and large spaces. It offers innovative, plug-and-play USB solutions.

Owl Labs should appear on your shortlist if:

- You need flexible meeting room solutions that reduce unnecessary costs associated with room licensing, dedicated computing, or specialized peripherals and accessories.
- You value ease of use, allowing users to join meetings effortlessly using their laptops and personal devices.
- You appreciate a company that invests in AI technologies to stay ahead of industry trends.
- You prefer an easy setup and a highly differentiated portfolio at competitive pricing.
- If you want to scale video affordably across small and mid-sized rooms.

Overview

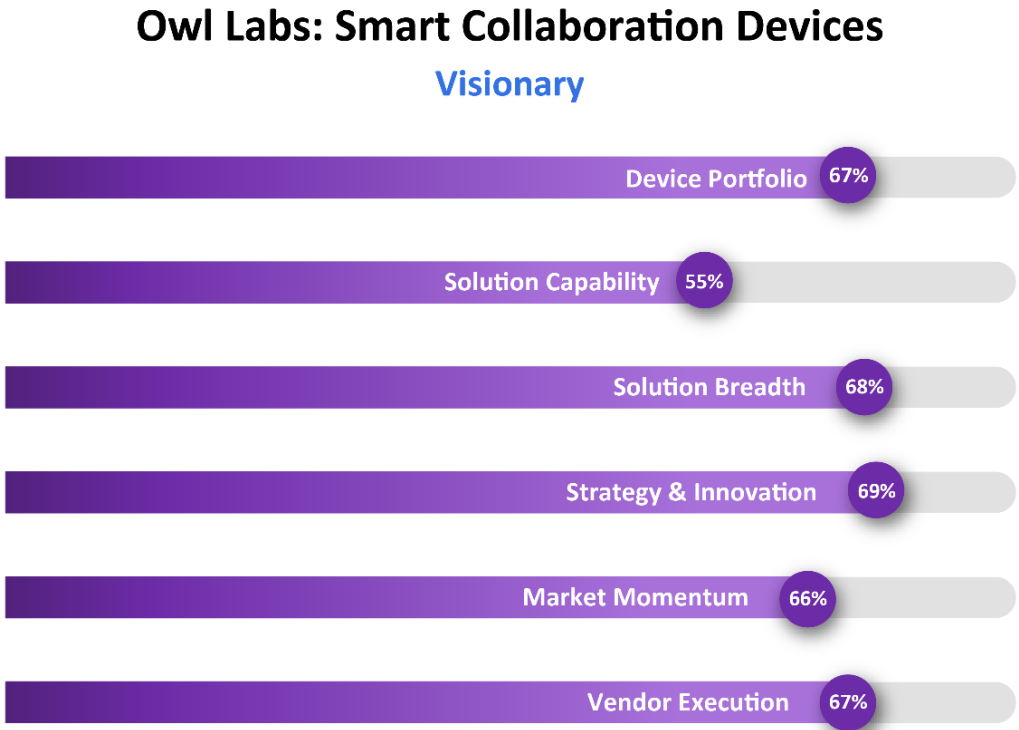
Owl Labs is recognized as a visionary in this Omdia Universe, with an overall unweighted score of 61% for its capabilities. In comparison, it received a score of 67% for strategy and execution and a solution breadth score of 68%. Owl Labs is noted for its innovative USB camera solutions, a unique offering that helps the company distinguish itself in a crowded market. Its primary product is the Meeting Owl, which features a 360-degree camera, microphone, and speaker system that automatically focuses on the active speaker, providing a more equitable meeting experience. Although many vendors strive to deliver products like the Meeting Owl, none have produced a standalone 360-degree camera solution that matches Owl Labs' features and price point; this added value gives Owl Labs a competitive edge. Although Owl Labs did not reach "Challenger" status primarily because of its portfolio depth, the company excels in sustainability, innovation, BYOD and flexible room solutions, and ease of deployment. The company effectively relies on its partners, Maxhub and Lenovo, to address any gaps in its portfolio. **Table 1** highlights its portfolio.

Table 1: Portfolio—Owl Labs

Devices	Description
Meeting Owl Series	A 360-degree video conferencing device with intelligent speaker tracking and automatic focus
Owl Bar	A front-of-room camera, microphone, and speaker device that integrates with the Meeting Owl Series
Whiteboard Owl	A device that captures and shares whiteboard content during video conferences
Expansion Mic	An additional microphone to extend audio coverage in larger meeting spaces

Source: Omdia

Figure 15: Omdia Universe ratings—Owl Labs



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Source: Omdia

Strengths: Innovation at the core

Owl Lab excels in small and mid-sized spaces, scoring 92%. Owl Labs provides a complete solution for these spaces, which can be deployed in BYOD mode or as a room kit when paired with an external compute and control panel. Businesses can use Owl Labs’ wireless system to create multi-camera setups with the 360-degree USB camera and front bar, available as pairs or standalone. The system also supports daisy chaining for additional accessories like microphones and speakers.

Owl Labs scored 80% on innovation. Over the years, the company has regularly invested in AI technologies to enhance its device portfolio by adding speaker tracking, group framing, background noise elimination, and staying ahead of industry trends. The Owl Intelligence System uses AI and machine learning to enhance camera perspectives and integrate video streams. It also understands its customers' pain points in hybrid environments, maintaining a clean, simple, and easy-to-understand portfolio. Additionally, it has introduced accessories and new devices like the Owl Bar to gain more business and help existing customers scale video collaboration across their small to larger meeting rooms at an affordable price. Owl Labs targets the corporate sector, primarily SMEs and public and education sectors, where quality and ease of use take priority. Its strategy of maintaining a highly differentiated portfolio that can be used in BYOD rooms works in its favor. The company fosters a culture of creativity and collaboration while ensuring innovation remains at the heart of its business.

Owl Labs achieved its third-highest subcategory score in device functionality, earning 76%. Owl Labs offers a multi-camera system that works independently or as an all-in-one solution. The Meeting Owl and Owl Bar provide flexible, budget-friendly mix-and-match options. They deliver 4K 30fps video via SuperSpeed cable, featuring AI-driven noise cancellation, volume equalization, auto-framing, and silent switching. Owl Labs' solutions are certified for Microsoft Teams and include TAA-compliant options for US federal government users. Their BYOD designs make them a favorite among SMEs, allowing businesses to use their preferred collaborative meeting service for conferencing and content sharing.

Omdia's strategic view

Owl Labs aims to enhance its presence in the enterprise segment by leveraging innovative technology partnerships. While many competitors depend solely on channels for their GTM strategy, Owl Labs leverages various routes, including managed service providers (MSPs), retail, its website, direct sales, and channel partnerships. Collaborating with other vendors is also its key strategic priority, particularly in addressing areas where the company lacks offerings, such as room controllers and meeting room compute solutions.

Limitations

Owl Labs operates mainly in the small and medium business (SMB) sector. However, this is not necessarily a limitation. The company is focusing on ecosystem partnerships and aiming to grow and expand through its partner network and the simplicity of its products. Owl Labs must concentrate on further enhancing its customer support and portfolio breadth. The company informed Omdia that it strategically addresses portfolio gaps by partnering with Maxhub and Lenovo while expanding customer support through a robust partner network. Although Owl Labs faces challenges with marketing resources compared to some competitors, it sees this as an opportunity, believing that its product's ease of use and adaptability can effectively promote itself. Omdia also recognizes that Owl Labs does not offer a complete meeting room solution. Still, the vendor's roadmap looks promising, with several innovations soon to be released, including MDEP-based products.

Yealink (Omdia recommendation: Leader)

Yealink offers one of the most extensive portfolios of affordable meeting room solutions certified for Microsoft, Zoom, and other platforms. Originally an SIP phone provider, Yealink swiftly entered the video conferencing market, bringing products that appeal to a wide range of verticals and use cases.

Yealink should appear on your shortlist if:

- **You seek cost-effective solutions.** Yealink's strategic manufacturing and supply chain efficiencies allow it to offer high-quality products at competitive prices.
- **You value rapid innovation.** Yealink's R&D investment and agile manufacturing processes enable it to adapt to market trends and deliver new technology quickly.
- **You want flexibility and choice.** Yealink provides a wide range of customizable options to suit various business needs, ensuring their solutions can be tailored to specific requirements.
- **You appreciate global availability.** Yealink's global network ensures wide availability and support for its products, making them accessible to customers worldwide.

Overview

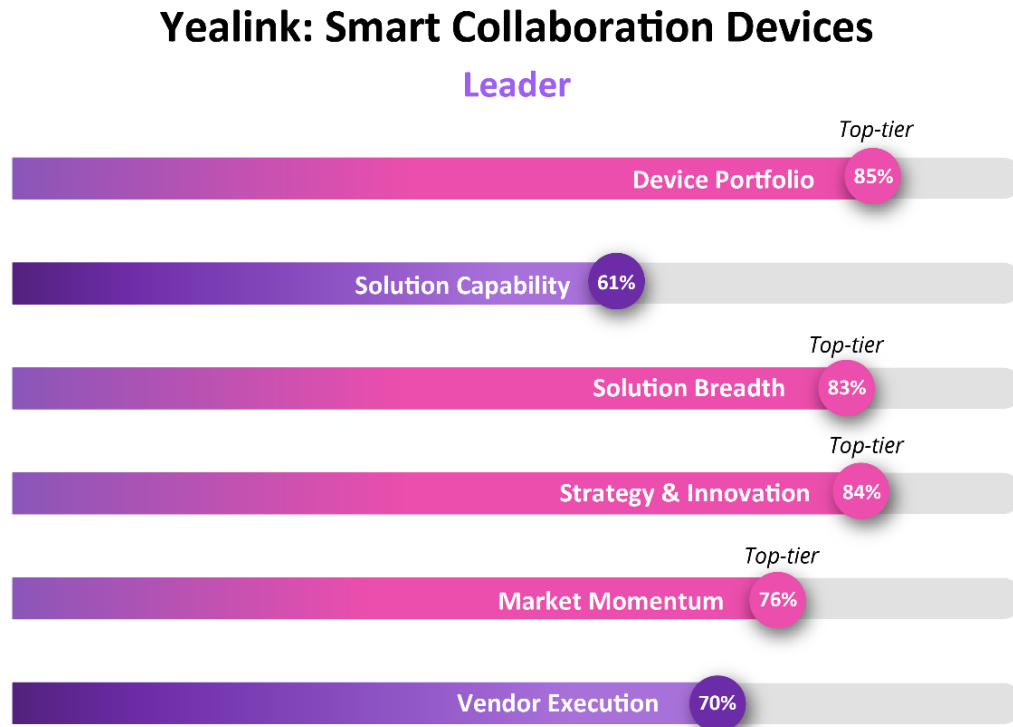
Yealink is classified as a leader in the Omdia Universe on smart collaboration devices with a total unweighted capability score of 75%, a strategy and execution score of 84%, and a solution breadth score of just above 83%. Yealink also scored above average in five other subcategories. An area where Yealink exceeds others is its GTM strategy, allowing the vendor to quickly move into new markets, grow its market share, create awareness, and work with a range of channel partners, where it scored an impressive 82%. Another area where Yealink scored similarly to other market leaders is sustainability, as the company prioritizes eco-friendly practices, uses recyclable materials, and obtains certifications such as ISO 14001 and ISO 14064. **Table 1** highlights its portfolio.

Table 1: Portfolio—Yealink

Devices	Description
Meeting Eye Series	All-in-one video conferencing systems with AI-driven features for small to large meeting rooms
Collaboration boards	Interactive displays for seamless collaboration in meeting rooms
Meeting Bar Series	Android-based videobars for small, mid, and large meeting rooms
MVC Series	Windows-based room kits for small, mid, and large meeting rooms
SIP/H.323 endpoints	Standards-based infrastructure and endpoints for on-premises deployment
Management Platform	Tools for managing and optimizing communication devices, including Yealink Device Management Platform
Accessories, peripherals, and complementary solutions	SIP and conference phones, headsets, webcams, accessories, scheduling panel, and room sensors

Source: Omdia

Figure 16: Omdia Universe ratings—Yealink



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Source: Omdia

Strengths

Yealink achieved a top category score of 85% for its portfolio. Yealink provides a comprehensive product portfolio that caters to all meeting spaces, from small/huddle rooms to large conference rooms. Its solutions include the all-in-one Android-based series for small to medium rooms, the Windows-based room kits for larger spaces, and interactive collaboration displays for open spaces. Additionally, Yealink's offerings feature intelligent USB cameras, headsets, and management platforms, ensuring seamless integration and high-quality performance across diverse environments. Omdia likes that its devices are certified to work with all major platforms, from Microsoft Teams, Zoom, Google Meet, and RingCentral. They can be easily repurposed to meet the organization's needs.

Yealink achieved an impressive 84% in strategy & innovation. Omdia commends Yealink for its innovation and agility, enabling the company to introduce new solutions to support its partners and customers swiftly. In collaboration with Microsoft, Yealink has successfully launched various affordable solutions to meet the demand for Microsoft Teams rooms, often being the first to provide solutions that support new features on the Microsoft Teams platform. The vendor collaborates closely with Microsoft, Zoom, and other platform providers to ensure that devices are compatible with collaborative meeting platforms and related software updates.

Yealink has seen good market momentum and scored 76% in this category. Its solutions are globally available and deployed in many verticals, including healthcare, education, and the financial industries. In Omdia's *Enterprise Unified Communications and Voice Equipment Market Tracker – 4Q24 and CY24 Data and 2025–29 Forecast*, Yealink's market share grew from 3% in 2021 to 9% in 2024, thanks to strong growth in an industry with many vendors and excessive competition.

Limitations

Yealink's weakest subcategory is customer experience, although it scored higher than many other vendors in this category. While this is its lowest-performing subcategory, Yealink has committed to enhancing its customer services with a premium service offering. This tailored, proactive, personalized, and high-touch support package helps customers manage the Yealink solution globally. Despite offering competitive features, Yealink is sometimes perceived as less premium than other brands. Omdia believes that with a growing market presence, Yealink will soon dispel some of the brand-related misconceptions.

Appendix

Methodology

Omdia Universe

Omdia's rigorous methodology for the Universe product involves the following steps:

- Omdia analysts perform an in-depth review of the market using Omdia's market forecasting data and Omdia's enterprise insights survey data.
- Omdia creates a matrix of capabilities, attributes, and features that it considers to be important now and in the next 12–18 months for the market.
- Vendors are interviewed and provide in-depth briefings on the current solutions and future plans.
- Analysts supplement these briefings with other information obtained from industry events and user conferences.
- The Universe is peer-reviewed by other Omdia analysts before being proofread by a team of dedicated editors.

Inclusion criteria

Omdia has diligently developed selection criteria for video conferencing devices and equipment in the Omdia Universe. The research will include only vendors that meet seven or more of the criteria below.

- **1. A comprehensive portfolio:** The vendor should offer a broad portfolio that allows its solution to be deployed in various spaces, including small, medium, large, and high-impact meeting rooms. Vendors should offer solutions based on Android and Windows-based OS directly or via partnership with compute providers.
- **2. AI and automation capabilities:** The vendor should offer some AI-powered features to enhance the user experience in the room.
- **3. Analytics and insights/reporting:** The vendor must offer a cloud-based monitoring and management platform that allows IT personnel to monitor and manage solutions remotely. Advanced analytics tools gather, capture, analyze, visualize, and report customer data to derive

insights and track metrics. These insights help admins understand usage, preferences, and engagement patterns to ensure uptake and usage.

- **4. Configurability and customization:** The devices should offer some levels of customization, allowing business users to adapt the devices to specific business use cases.
- **5. Sensors:** There needs to be support for capabilities to analyze meeting room data (number of meeting participants, environmental/room telemetry, etc.) via embedded sensors to support manageability, adaptability, and usability.
- **6. API/SDK integration capabilities:** There also needs to be seamless integration via APIs and connectors with other third-party solutions to facilitate room automation and data flow between the devices.
- **7. Security and compliance:** Devices meet the security and compliance requirements of different markets and regions, such as the European Union and the US.
- **8. Accessories such as mounts, cables, fixtures, etc., are needed for quick deployment.**
- **9. Adjacent and emerging technology capabilities:** Emerging technologies that enhance ease of use and boost meeting space utilization include intelligent workspace reservation software, scheduling panels that display meeting room availability and room metrics, in-room digital meeting controllers for fast one-click-to-join meetings, and room sensors that ensure optimal environmental control setups.
- **10. Support for Bring Your Own Meeting (BYOM) functionality:** Vendors may offer a full BYOM solution or additional peripherals to use the room kits and appliances in a BYOM mode.
- **11. Interoperability:** Vendors may offer interoperability solutions with their devices or partner with an interoperability provider to enable any-to-any video conferencing app connectivity.
- **12. Certification:** Support for a broad ecosystem of collaboration and productivity cloud services, applications, and platforms via certified offerings is needed. Vendor
- **13. Managed and professional services** should also be required.
- **14. A well-rounded global channel partner community** should also be required.

Further reading

[*Enterprise Unified Communications and Voice Equipment Market Tracker – 4Q24 and CY24 Data and 2025–29 Forecast*](#) (March 2025)

[*“UC&C vendors present innovative, sleek, and simplified meeting room solutions at ISE 2025”*](#) (February 2025)

[*Enterprise Video Conferencing Devices Survey 2024*](#) (January 2025)

[*“Video-equipping meeting rooms is crucial but costly for full-scale implementation”*](#) (January 2025)

[*2025 Trends to Watch: Unified Communications and Collaboration*](#) (December 2024)

[*UCaaS - Market Data and 2024-2028 Forecast - 1H24*](#) (October 2024)

[*“The MDEP Dilemma: Microsoft’s bold move or a blow to vendor diversity”*](#) (July 2024)

[*Enterprise Video Conferencing Equipment and Service Survey*](#) (November 2023)

[*Interoperability with Microsoft Teams becomes key to Cisco's strategy*](#) (November 2022)

[*Omdia Universe Collaborative Meeting Services 2022-23*](#) (June 2022)

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