FROST & SULLIVAN

BEST PRACTICES



2026 GLOBAL VIDEO COMMUNICATIONS

NEW PRODUCT INNOVATION

Google Beam | hp

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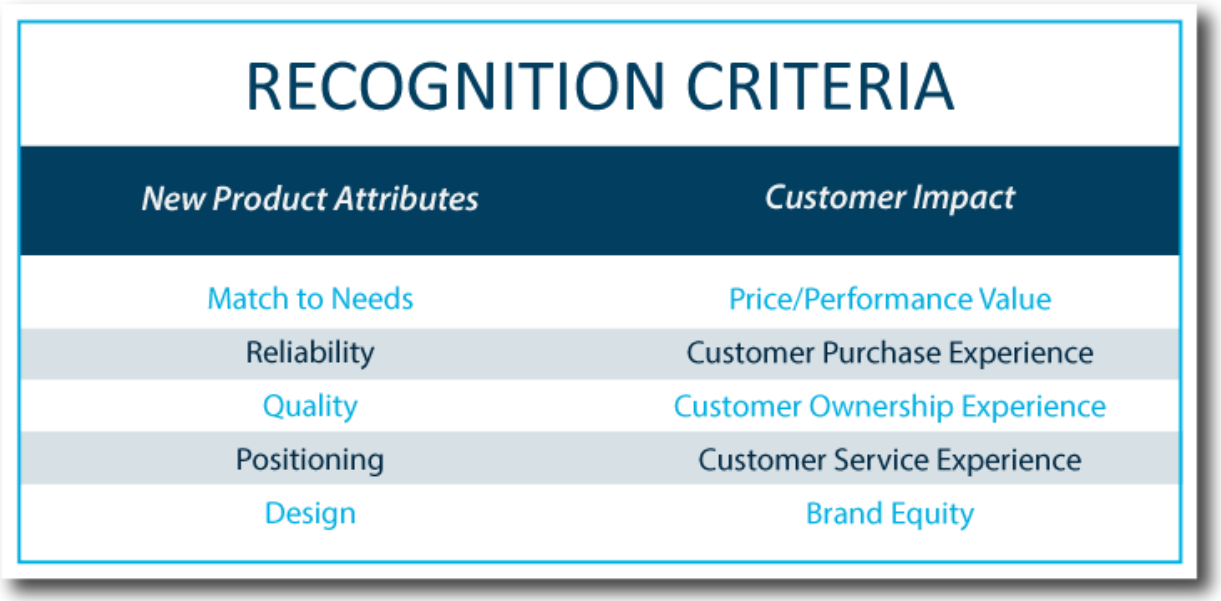
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Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Google and HP excel in many of the criteria in the video communications space.



Reengineering The Future of Communication

Video meetings have become an essential part of how we work, collaborate, and stay connected—an evolution that has accelerated dramatically in recent years. Technology vendors have rolled out a steady stream of innovations designed to help distributed participants feel more engaged: intelligent cameras, spatial audio, background effects, collaborative apps, and AI-powered enhancements that attempt to emulate the dynamics of in-person interactions. Despite these advances, today's video meetings fall far short of in-person face-to-face conversations.

> *"HP Dimension with Google Beam is the industry's clearest answer to narrowing the gap between virtual and in-person interactions. The groundbreaking collaboration between Google and HP represents a meaningful shift that engineers the end of distance by restoring the depth, nuance, and human-centric connection that traditional video communication does not deliver."*
>
> ***Roopam Jain,***
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> ***VP of Research, Frost & Sullivan***

In Frost & Sullivan's 2025 global survey of IT decision-makers and business leaders, an overwhelming 90% of respondents indicated that improving the team collaboration experience is important or critical for their organization's success.[1] Today, the video communication experience is limited to flat, 2D calls that often make it difficult to read subtle expressions, maintain natural eye contact, or feel truly present with the people on the other end. As a result, a significant gap remains between virtual collaboration and the richness of in-person meetings.

In 2021, when Google first unveiled Project Starline, it offered a glimpse into the company's most ambitious attempt yet to reinvent distributed communication. Rather than iterating existing video communication technologies, Google set out to fundamentally rethink how presence could be conveyed across distance. The multi-year research and development effort culminated in 2025 with the launch of Google Beam, a disruptive, next-generation 3D communication platform that brings the depth and realism of natural, lifelike, human interactions to distributed teams. In partnership with HP, Google has launched HP Dimension with Google Beam, a groundbreaking solution that addresses the shortcomings of conventional video communications in a bold, innovative way, one that has the potential to reshape how people meet forever. By showing video participants as they truly are, it restores a sense of realism and presence in virtual meetings. HP Dimension with Google Beam captures the full spectrum of nonverbal cues, improves retention, and reduces meeting fatigue without requiring headsets, glasses, or a complex setup.



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[1]Frost & Sullivan's Annual ITDM Communications and Collaboration Survey, Global, June 2025

A Pioneering Platform that Leads with Innovation

At the heart of HP Dimension with Google Beam is a tightly integrated stack of hardware, software, AI, and cloud orchestration. Its impactful experience is built upon five foundational factors:

- **An AI Volumetric Model:** The power of the solution begins with a new state-of-the-art video model that transforms 2D video streams into a realistic 3D experience. An array of six cameras, in the bezel of the unit, captures participants from different angles. Google Beam's AI merges the video streams to render a lifelike, 3D live feed. This model is central to Beam's ability to preserve the nuances of in-person communication.
- **Light-Field Display:** The 3D reconstruction is displayed on a custom 65-inch light-field display designed to render true-to-life depth and adjust perspective based on the participant's position. Instead of relying on wearables for a 3D experience, the display simulates dimensionality through precise head-tracking and directional light projection. In addition, the unit has adaptive lighting to normalize skin tones, highlights, and shadows. The result is a natural, immersive conversational experience that captures the full spectrum of facial expressions and body movements while maintaining genuine eye contact, so the other person feels positioned just across the table rather than flattened onto a screen.
- **Intelligent Content Awareness: HP Dimension with Google Beam** also supports context-aware visual adjustment during collaborative work. When slides, documents, or shared materials appear, the system automatically repositions the participant's 3D rendering so that both the content and the person remain visible on the display without overlapping. This adaptive layout preserves a sense of presence while keeping shared content central to the discussion.
- **Spatial Audio and Beamforming Microphones:** The natural and realistic visual experience of HP Dimension with Google Beam is combined with spatial audio technology, so voices appear to originate from the exact on-screen position of the remote speaker. HP complements this with Poly Studio A2 audio hardware—table microphones that improve pickup and echo control with AI noise reduction technology removing background noises and reverberation to ensure it sounds like you're in the same room. This capability reduces participants' cognitive load and provides a more natural flow in conversation.
- **The Google Ecosystem Advantage: HP Dimension with Google Beam** is a continuation of Google's long-term efforts to evolve how people connect, collaborate, and communicate across distance. The company has been a leading innovator in bringing to market advanced communication capabilities across platforms and devices—from Google Meet to the broader Workspace suite. This foundation enables the solution to integrate into existing workflows without requiring organizations to adopt unfamiliar tools or environments. HP Dimension with Google Beam extends this ecosystem with next-generation AI, including real-time translation, enhanced automation features, and deeper Google-AI-powered capabilities.

Flexibility is a key tenet of HP Dimension with Google Beam. Today, the solution works natively with Google Meet and Zoom, with plans to add additional meeting platforms over time. Users are not locked into a proprietary environment, and when communicating with a participant who is not using Google

Beam, the call falls back to a 2D session. This ensures continuity across a wide range of meeting scenarios without forcing either party to change tools. This flexibility allows organizations to maximize the ROI by using the full 3D experience and advanced capabilities where available, while continuing to use it for familiar meeting applications elsewhere.



Source: HP, Inc.

Assessing the Human and Business Impact

While HP Dimension with Google Beam's engineering—the volumetric capture, spatial audio, and AI-driven rendering—is notable, its real value lies in how these capabilities enable new ways of working and opportunities for more human-centric engagement. As distributed work evolves, organizations are increasingly examining its impact on collaboration, culture, and equity. Many business leaders are focusing on distributed work and return-to-office mandates to foster a collaborative, peer-to-peer culture that build relationships and provides mentorship while ensuring employee productivity. However, these initiatives are facing significant pushbacks from employees, many of whom may choose to quit instead.

HP Dimension with Google Beam has entered the market at a pivotal point not simply as a technical achievement, but as a strategic platform designed to influence the rules of engagement in the hybrid work era. As the debate between maintaining workplace culture and employee preferences continues, one thing is clear—technology can help bridge gaps in collaboration, connection, and presence.

Behavioral research conducted by Google has revealed the profound impact of Google Beam on user engagement and experience. The findings indicate that its true-to-life communication platform powered by Google AI yields significant improvements over conventional video calls—with users demonstrating a 28% increase in memory recall, displaying up to 39% more non-verbal behaviors, and maintaining a 14% increase in focus. In addition, the combination of lifelike depth, spatial audio, and improved attention reduces meeting fatigue**.** These insights suggest that the fidelity of interaction matters more than the location. When individuals can see and engage with each other more naturally, the underlying communication becomes more effective. This becomes especially relevant as companies revisit hybrid work policies and confront concerns such as proximity bias. HP Dimension with Google Beam's realistic and natural representation gives participants a stronger presence in high-stakes settings such as employee reviews, project discussions, customer conversations, or leadership forums.

> *"By reducing the perceptual disadvantages that*
> *—especially in high-stakes discussions—*
> *HP Dimension with Google Beam enhances business outcomes while reducing travel. Ultimately, these capabilities underscore a powerful message: in the future of work, meaningful connections can transcend physical location."*
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Early Adoption and Market Momentum

In the short time since its launch, HP Dimension with Google Beam has attracted considerable interest from large global organizations and has seen positive early adoption. Its customer base includes many Fortune 500 companies and diverse organizations across various industries, with many moving from pilot programs to active deployments. Customers are deploying the solution across a wide range of use cases, including job interviews and recruiting, mentoring and talent development, everyday collaboration and productivity, as well as executive conversations and connecting distributed teams that directly reduce the need to travel.

Noteworthy organizations such as Deloitte, Duolingo, Hackensack Meridian Health, Huntington Bank, NEC, Salesforce, and Schwarz Digits have joined the growing roster of early adopters that are benefiting from Beam's true-to-life capabilities in their offices. Early users report that HP Dimension with Google Beam is helping their businesses redefine connection and significantly reduce executive travel. Similarly, other customers have noted its impact on building client trust through authentic, life-sized interactions.

Google has also launched a pilot program with the United Service Organizations (USO) to bring HP Dimension with Google Beam to military centers across the United States and abroad. The initiative aims to strengthen connections between military personnel and their loved ones through lifelike video calls, creating a sense of being in the same physical space despite the distance.

Brand Equity

HP Dimension with Google Beam benefits from Google and HP's long-established reputation for solving complex communication challenges. Over the past two decades, Google has consistently delivered solutions that redefine entire categories—from Search and Android to Google Maps, Google Cloud, and

Google Workspace. HP is a global technology leader committed to designing solutions that help IT leaders shape the future of work. By delivering intelligent, secure, and scalable technologies, HP empowers organizations to create exceptional employee experiences that drive productivity, engagement, and business growth. The legacy of market-leading innovation underpins the brand identities of these two companies. Equally important, the core tenet of simplicity and usability extends to HP Dimension with Google Beam; the platform benefits from the trust customers already place in Google and HP to deliver powerful, easy-to-adopt communication solutions.

This brand equity is critical to building customer trust and adoption. In today's challenging business environment, organizations adopting new collaboration platforms face meaningful risks: interoperability, security, long-term support, and the reliability of the underlying technology. Google and HP's track record of sustained investment in foundational technologies mitigates these concerns.

Conclusion

By restoring natural eye contact, lifelike presence, clear gesture visibility, and fluid conversation, HP Dimension with Google Beam directly addresses the limitations that have long impeded effective video communication. It meaningfully narrows the gap between virtual and in-person interactions, opening new possibilities for effective distributed work. By reducing the perceptual disadvantages that can arise in distributed collaboration —especially in high-stakes discussions—HP Dimension with Google Beam enhances business outcomes while reducing travel. Ultimately, these capabilities underscore a powerful message: in the future of work, meaningful connections can transcend physical location. For this unique, disruptive, and value-added innovation, HP and Google earn Frost & Sullivan's 2026 Global New Product Innovation Recognition in the video communications market.

What You Need to Know about the New Product Innovation Recognition

Frost & Sullivan's New Product Innovation Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the New Product Innovation Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

New Product Attributes

Match to Needs: Customer needs directly influence and inspire the product portfolio's design and positioning

Reliability: Product consistently meets or exceeds customer performance expectations

Quality: Product offers best-in-class quality with a full complement of features and functionality

Positioning: Product serves a unique, unmet need that competitors cannot easily replicate

Design: Product features an innovative design that enhances both visual appeal and ease of use

Customer Impact

Price/Performance Value: Products or services offer the best ROI and superior value compared to similar market offerings

Customer Purchase Experience: Purchase experience with minimal friction and high transparency assures customers that they are buying the optimal solution to address both their needs and constraints

Customer Ownership Excellence: Products and solutions evolve continuously in sync with the customers' own growth journeys, engendering pride of ownership and enhanced customer experience

Customer Service Experience: Customer service is readily accessible and stress-free, and delivered with high quality, high availability, and fast response time

Brand Equity: Customers perceive the brand positively and exhibit high brand loyalty, which is regularly measured and confirmed through a high Net Promoter Score®

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Benefits & Impact

Receiving a Best Practices Recognition allows recipients to take a step back and reflect on their achievements and celebrate them. Many might be at the very beginning of that journey, and for some, this comes as validation of years of hard work. We take pride in helping these trailblazers promote their recognition and showcase how Best Practices Recognition recipients are changing the world.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

This recognition results from many individuals making daily critical decisions to support your organization and contribute to its future. Frost & Sullivan enthusiastically acknowledges and celebrates their contributions.

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

Learn more.

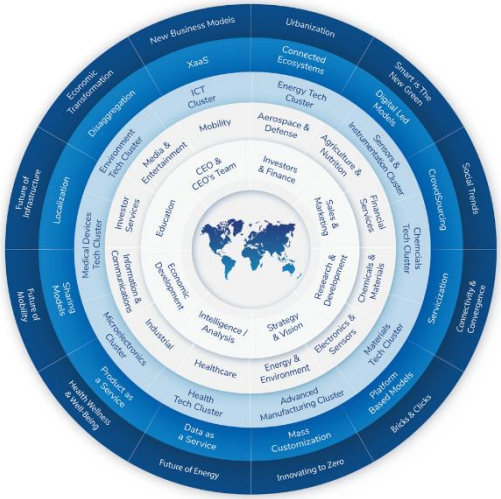


Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.



Analytical Perspectives:

- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)