Digital Workspace: Competitive Landscape Assessment

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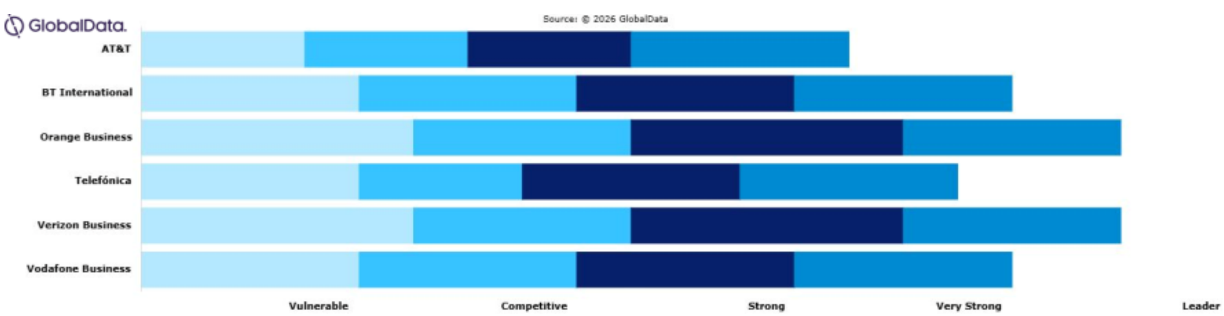
Competitive Landscape Assessment - Collaboration and Communications (Global)

Report Summary:

Despite pressure from falling usage among enterprises, IP voice is seen as a core product by most providers with the contact center market offering the biggest opportunity for growth.

Product Class Scorecard



Market Overview

Product Class	Digital Workspace
Market Definition	This report covers the market for internet protocol (IP) voice, collaboration, and customer contact solutions as provided by global service providers, primarily for large corporate and multinational corporation (MNC) customers. This report looks primarily at cloud hosted solutions, although on-premises capabilities are considered, particularly for customer contact. The report also examines how service providers supply additional support services for enterprises (e.g., user adoption).
Rated Competitors	. AT&T . BT International . Orange Business . Telefónica . Verizon Business . Vodafone Business
Additional Competitors	. Deutsche Telekom . Tata Communications
Changes Since Last Update	. **March 2026:** Orange Business is launching Live Collaboration, a sovereign suite of collaboration tools hosted on Cloud Avenue SecNum for the French public sector.

	. **July 2025:** BT announced the creation of its new BT International division which will serve the international IP voice, UC, and network services market. . **June 2025:** Vodafone Business and Airbus Public Safety and Security have partnered to launch secure business critical and collaborative communication services in Europe. The suite of solutions includes voice, instant messaging, video streaming, and location services. . **June 2025:** AT&T announced the launch of AT&T Business Voice, IP voice solution engineered to modernize traditional lines. The solution delivers consolidates analog voice and utility lines and is compatible with all types of access service.

Market Assessment

The global digital workplace market presents a number of challenges for services providers as voice revenues are under pressure and enterprises are more careful in how they spend on advanced collaboration features and move towards voice calls via collaboration platforms (e.g., Teams, Zoom, and Webex) rather than IP voice calls. Service providers are also going through a learning process in terms of AI in collaboration and customer contact solutions, trying to understand where they sit in the value chain and where they can add value.

Source: GlobalData Market Opportunity Forecast to 2029: Communications and Collaboration -For the full forecast click here.

The market for IP voice is uncertain and yet it is also seen as a key market by most service providers. Enterprises are using significantly less IP voice for internal communications, but it remains important for external calls and it is particularly prominent still in certain job roles (e.g., sales) and certain verticals (e.g., professional services, healthcare, and entertainment).

There is also persistently strong demand for voice in the contact center space despite the growing impact of AI. AI has automated many of the more repetitive tasks (e.g., balance inquiries, order status check, password reset, etc.) but for more complex, regulated sales, or high importance calls voice continues to be a hugely important medium. Voice for agentic AI is also an area being examined for potential growth opportunities by providers, but exactly how this will manifest is unclear. The likely scenario will be API-enabled voice services for agentic agents - somewhat similar to CPaaS.

Voice is a core service for providers and as most operators are going through a process of streamlining their product sets they are still investing in their IP voice capabilities. It is an area where providers can offer distinct value in terms of quality and integration with multiple platforms. IP voice services are a part of most providers' wider Network-as-a-Service (NaaS) strategies, which is delivering enhancement to the service ordering and provisioning process and allowing providers to sell IP voice though a wider number of partners (e.g., hyperscaler portals). There is a real opportunity for providers of international voice services to differentiate by their ability to integrate with and between multiple platforms (collaboration, contact center, CRM, etc.) and to navigate the regulatory challenges of delivering PSTN replacement in multiple geographies.

On the collaboration side, most providers are still reluctant to resell licenses other than on a bespoke basis for very large clients. There is a spectrum of approaches to selling UC between providers who are adopting a more light-touch managed service approach for UC and those who are taking a more integrator-lite market position (e.g., Orange).

However, there is a feeling among providers that after a post-pandemic period of collaboration solution rationalization among enterprises there is an opportunity for growth as enterprises seek to adopt multi-collaboration vendor strategies. There are multiple reasons for this trend from ranging from resiliency and regionalized buying strategies to fatigue with existing vendor partners. Microsoft remains the significantly dominant force, but providers report growth with alternative vendors, including Zoom and Ring Central, and a lingering demand for Cisco Broadworks-based voice solutions. These trends are making many providers look again at how they offer managed UC services.

Service providers are not leading innovation in AI platforms, but they are demonstrating that they can play a role in helping enterprises to adopt AI features. Most providers enable the full AI-suites of their chosen collaboration vendor partners and many have solutions around helping enterprises to utilize AI features and to ensure that the AI tools are used in a secure and compliant manner.

AI is most prominent in contact center environments and again the role for service providers is as enablers rather than AI platform providers. Enablers through integration of voice with AI features, and enablement through helping enterprises what they need to do in terms of data management. All providers continue to see contact center as an important growth opportunity. The importance of contact center can be seen by the fact that AT&T has reversed its temporary pause on selling contact center solutions and is in the process of expanding its range of contact center partners.

Market Drivers

. **AI:** AI within the collaboration environment is reaching an inflection point with the advent of agentic AI. Helping enterprises to understand and manage the range of AI features available to them across multiple platforms is increasingly important. Similarly, helping enterprises to create secure and compliant environments to deploy agentic services with associated data management capabilities.

. **User Experience:** The usability, performance, and reliability of collaboration solutions is crucial for enterprises as they seek to increase productivity and attract and retain talent.

. **Hybrid Working:** While many workers have returned to the office, working patterns are still more flexible than before the pandemic. The need to provide workers not in the office with full access to collaboration tools from multiple devices (e.g., mobile, laptop, tablet, etc.) and from any location is a key priority for enterprises. Hybrid working solutions include both core collaboration platforms and bundling with service such as SSE and device security.

. **Mobility:** While unified communications when using a laptop or desktop remains hugely important, the true efficacy of collaboration solutions is often determined by performance on mobile devices. Solutions such as Microsoft Teams Phone Mobile have accordingly gained significant sales traction.

. **APIs:** Integration of IP voice and collaboration services with contact center platforms, customer relationship management (CRM) solutions, enterprise resourcing planning (ERP) applications, IT service management (ITSM) platforms, and other business apps is now an integral part of delivering an MNC-grade collaboration solution.

Buying Criteria

. **Portfolio Depth:** While Microsoft is dominating the collaboration market, it is important for providers to offer a multi-vendor collaboration suite. Many enterprises operate more than one collaboration solution and may favor different platforms for different scenarios or use cases as well as improving resiliency.

. **AI:** We are still at early days for agentic AI as a technology, but it will be a crucial component in customer contact transformation strategies. Providers must have partnerships in place to deliver GenAI capabilities and the internal expertise to consult on and deliver GenAI as part of their collaboration and customer contact suite.

. **IP Voice:** Voice remains a fundamental component of the collaboration and customer contact landscape. Rating a provider's IP voice capabilities includes both its native IP voice solutions and its ability to offer services such as Cisco Webex Calling and Operator Connect for Microsoft Teams.

. **Hybrid Worker Solutions:** The return to the office has not been 100%, and a significant percentage of the traditionally office-based workforce is now hybrid. Collaboration solutions must enable employees to work securely and efficiently wherever they are and include strong support for mobile devices.

. **CPaaS and APIs:** The need to embed communication into apps and websites makes CPaaS an increasingly important part the customer contact solutions. CPaaS also offers CSPs a way to replace lost IP voice revenues.

. **Professional Services and Support:** GlobalData's ratings examine the in-house and partner-sourced vendor support capabilities that a provider has. In addition, the support a provider can deliver both during deployment and throughout the life of a solution to foster increased usage is significant.

. **Security and Compliance:** While security remains a separate part of most providers' portfolios, CSPs must demonstrate the ability to secure customer data. This extends to the ability to meet data compliance and sovereignty rules.

. **Customer Contact:** CSPs should offer enterprises a multi-vendor contact center portfolio supported by strong IP voice solutions. AI capabilities around chatbots, small and large language models, and agent support as well as an ability to integrate between customer contact and collaboration solutions are all also important.

Vendor Recommendations

. **AI:** Service providers should view AI as a crucial way of differentiating and answering the 'why buy from me

• ' question. Providing more automated AI solutions will appeal to a wider audience than systems integrators heavily consulting-led practices. However, CSPs should also offer guidance on how to implement AI successfully.

. **Integration and APIs:** Providers need to deliver solutions that envisage voice and collaboration as part of an enterprise's wider applications estate. Providers should be working to deliver a library of APIs that are accessible for their customers and to enhance customer portal functionality. CPaaS should also be seen as an extension of this. This approach is critical in responding to the growing challenge from over-the-top communications (OTTs).

. **Observability:** Providers should seek to deliver full visibility and control across a customer's collaboration estate. All the collaboration vendors offer management portals and reporting features, but this will not necessarily extend to the access component. Additionally, if customers have a multi-vendor estate, delivering a single management portal will be a differentiator.

Buyer Recommendations

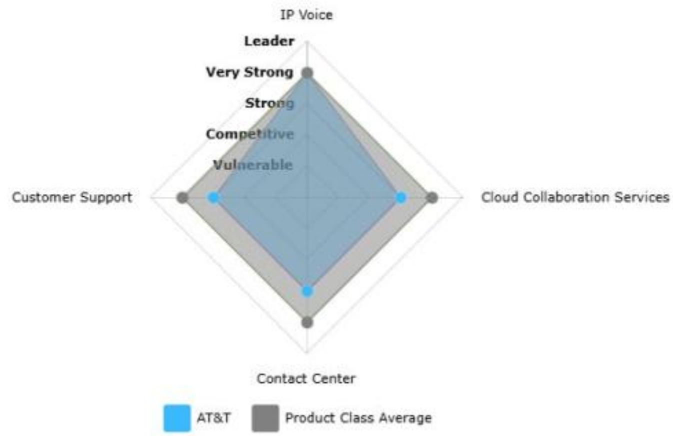
. **AI:** Enterprises should look for collaboration solution partners with a strong message on AI features. On the collaboration side, this should include best practice consulting on using platforms such as Microsoft Copilot. In the contact center, this should include using GenAI and large language models to improve automation and agent assistance.

. **User Training:** Buyers should quiz providers on the user training and adoption services they can provide. Internal user buy-in remains one of the largest barriers to the success of collaboration service deployments.

. **Analytics:** Enterprises should ask providers about the reporting and analytics services they can provide. Service performance is a key element of this, but it is not the end of the story. This reporting can also ensure that services are being used. More advanced analytics derived from collaboration solutions can also offer insight into internal working practices and interactions with customers.

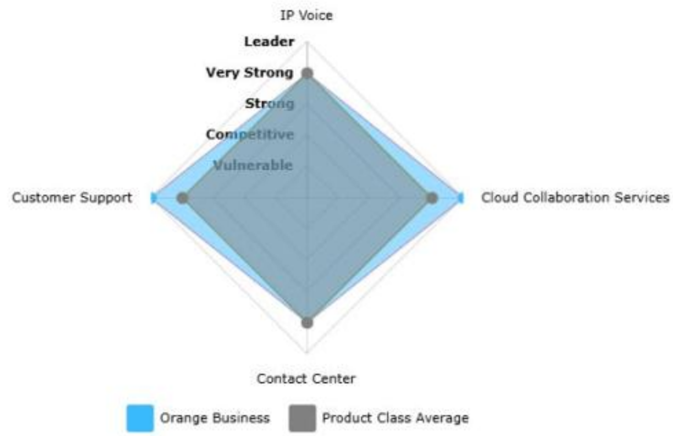
Rated Competitors

Product Name	AT&T
Current Perspective	AT&T is strong in the digital workplace market as it offers a wide range of IP voice services alongside proven unified communications and contact center solutions. Over the last two years, the provider has begun the process of refreshing its portfolio, having previously reduced its focus on UC and CCaaS services. AT&T's portfolio evolution will gradually see its recently launched AT&T Business Voice proposition replace its existing AT&T Phone for Business and AT&T Phone for Business Advanced propositions to offer a voice solution that will run over any access service (including wireless) and include specialty lines capabilities. AT&T Cloud Voice provides PSTN calling for US services and is integrated with the major UC providers (Microsoft, Cisco, Ring Central, etc.). It is AT&T's most global IP voice solution available in 130 countries with full PSTN replacement available in more than 20 countries in Europe and APAC. For medium-large enterprises, AT&T maintains its Broadworks-based Hosted Voice Services (HVS) solution which is also a mainstay of its US public sector oriented portfolio. The provider is layering in AI service within its portfolio, and it is developing an agentic AI agent solution that will help customers screen and direct calls. On the collaboration side, the RingCentral-powered Office@Hand is AT&T's leading proposition. The provider offers the full range of features, including RingCentral's AI-functionality, and reports strong growth with the service which is also supported by full FMC integration with mobile devices utilizing the AT&T network. AT&T has resumed selling managed Microsoft Teams solutions (although it only resells licenses on a bespoke basis). The provider offers both Direct Routing and Operator Connect solutions as well as Teams Phone. AT&T has put a sales hold on Cisco Webex solutions but is still supporting existing customers. The provider has revitalized its contact center capabilities. AT&T's partnership with Five9 forms its primary go-to-market solution. In addition it now offers solutions based on Genesys, Nice, and Avaya.
Buying Criteria Rating	**Cloud Collaboration Services** Strong **Contact Center** Strong **Customer Support** Strong **IP Voice** Very Strong

Product Scores	**Strong** 
Strengths	. AT&T has a compelling reputation as a provider of IP voice services, and it is very well-positioned to tap into that growth. . AT&T has a strong mobile flavor to its digital workplace portfolio with full FMC integration for its RingCentral-based Office@Hand proposition as well as offering Microsoft Teams Phone solutions. . AT&T's voice solutions are fully integrated with its network platforms, allowing it to offer highly resilient solutions with native QoS capabilities. It also offers a string anti-fraud capabilities combining both AI analytics and databases. . AT&T offers a strong set of analytics tools for its IP voice propositions.
Limitations	. AT&T remains a powerful brand but its changing focus on UC and contact center services has confused customers and given some of its competitors the opportunity either to close the gap or move ahead. . While AT&T embraces AI elsewhere in its portfolio and operations, it is less apparent within its collaboration portfolio. . AT&T hopes to be the go-to IP voice partner for unified communications and contact center vendors, but most will remain neutral as it is in their best interests to do so.
Product Name	BT International
Current Perspective	BT International (BT) is a very strong competitor in the global digital workplace market offering compelling international reach for its voice services over a one of the strongest global network-as-a-service platforms. Global SIP is the center piece of the provider's strategy under the 'Global Managed Voice' brand. The provider has as stated ambition of 'meeting its customers where they are heading' and so is moving its voice capabilities to the cloud with the aim of delivering improved resilience, digitalization, and security. The provider manages over 16 billion calls to customers' contact centers in over 70 countries every year - and over 6.5 million phone numbers in 27 countries with overall voice minutes growing 12% in the past year. BT's voice platform is being integrated with the BTI Global Fabric NaaS platform and already runs over the network. BT has also worked with a number of partners to deliver pre-built integrations including with 54 SIP partners globally, the major hyperscalers, and various CPaaS, UCaaS, and CCaaS vendors such as Genesys Cloud.

	The BT MS Teams proposition has been enhanced with the launch of Teams Phone Mobile. BT also offers Operator Connect and Direct Routing solutions for Teams on a global basis. BT reports continued strong take-up for both. BT offers hybrid and Direct Routing solutions globally that can be offered alongside a fully managed service. On the contact center side, BT is no longer actively selling new on premises contact center platforms, but continues to support existing Avaya and Cisco on prem customers while transitioning the portfolio to CCaaS. The provider has expanded its CCaaS stable to include Five9 and Anywhere365 alongside Genesys and Cisco.
Buying Criteria Rating	**Cloud Collaboration Services** Very Strong **Contact Center** Very Strong **Customer Support** Very Strong **IP Voice** Very Strong
Product Scores	**Very Strong** 
Strengths	. BT International has sold over 2.1 million voice and unified communications seats across the Americas, UK/Europe, and Asia-Pacific/Africa and has 390 installed SIP trunking customers with 620,000+ SIP trunk channels. . BT's global capabilities include full PSTN replacement in 27 countries, voice nodes in 40 countries and tier 1 inbound capabilities in 175 countries. BT also has more than 50 global SIP partners. . BT's collaboration services are accompanied by a secure network and proven security practice supported by more than 3,600 security professionals. Collaboration-specific solutions include fraud prevention and transmission security. . BT offers a high degree of resiliency for its IP voice services via fail-safe data centers around the globe to support its IP voice, unified communications, and contact center platforms. BT's voice and unified communications products are now supported by its Global Fabric platform. . BT has integrated its IP voice service with ServiceNow as part of a wider partnership with the software company aimed at supporting digital transformation projects in enterprise contact centers. . BT has built its own CPaaS capability with presence in 20 markets.

	BT has initially focused on selling voice-based CPaaS capabilities with some of the most well-known collaboration, CCaaS, and CPaaS vendors already listed among its customers. BT is also building CPaaS messaging solutions centered around SMS.
Limitations	. BT's messaging on AI in collaboration is less well-developed than competitors such as Orange, Telefonica, and Vodafone. For example, despite its partnership with Microsoft, BT has not developed a consulting practice around Microsoft Copilot. . Competitors will question BT's ongoing commitment to the global market and will be able to use regional presence to differentiate from BT outside Europe (e.g., OBS in Africa, Telefónica in Latin America, and Verizon in North America). . While BT offers a strong managed services capability and professional services support, it is also focusing on a more automated sales process with less emphasis on bespoke design. This change makes sense in many ways but may reduce BT's competitiveness for the largest enterprises.
Product Name	Orange Business
Current Perspective	Orange Business (Orange) is a market leader in the global digital workplace market for multinational corporations (MNCs) because the provider combines a compelling range of services and vendor platforms with a compelling and nuanced approach to sell collaboration services. The provider has also begun to layer in a stronger 'CX' message into both its go-to-market messaging and portfolio with a heavy emphasis on how AI can enhance collaboration and customer service. Orange is able to provide a range of AI consulting capabilities and now also includes Microsoft Copilot as part of its collaboration portfolio with a view to helping enterprises understand how to get the best of the AI tool. The company's go-to-market approach is to provide comprehensive consulting on customers' digital transformation strategy, backing this with an offer to take over their legacy systems and applications as well as shepherd the firm through the transition to a simplified global ICT infrastructure. Orange provides a range of enhanced analytics capabilities as well as the leveraging of improved internal network monitoring and application management tools (e.g., Visibility-as-a-Service), and a suite of new monitoring capabilities specifically for MS Teams to create better user experiences. Orange's workplace/workforce portfolio includes virtual desktop and unified endpoint management (UEM) capabilities. On the desktop and UEM side, Orange's partners include Microsoft, Citrix, Ivanti, and VMware. The provider manages more than 100,000 virtual desktops and more than 1.5 million UEM licenses.
Buying Criteria Rating	**Cloud Collaboration Services** Leader **Contact Center** Very Strong **Customer Support** Leader **IP Voice** Very Strong
Product Scores	**Leader**

	
Strengths	. Orange has positioned customer experience orchestration as a major tenet of its portfolio taking the learnings it has used from deploying AI within its own operations. The provider has created a compelling managed AI proposition centered around eight proven use cases and supported by strong monitoring tools. . Orange's first-class customer support is delivered by 21,316 staff in 166 countries including 7,700 in customer services and operations, with experts offering 24x7 support across five global customer service centers. . Orange has invested heavily in its service performance monitoring capabilities including dedicated performance tools for Teams including root cause analysis capabilities enhanced by AI. . Orange's UC portfolio is accompanied by a very strong security practice and a focus on sovereign hosting of customer data. Orange operates 10 data centers across Europe to support sovereign data hosting. . Orange states that it has 3,400 service desk experts, 50+ customer journey/CX consultants, and more than 700 software engineers supporting its customer contact portfolio.
Limitations	. Orange's consultation-led approach delivers results but can contribute towards Orange being less flexible on price than some of its peers. . Orange has acknowledged that OTTs represent a particular threat to its unified communication revenues. . While Orange offers strong global support, its consulting capabilities are primarily based in France.
Product Name	Telefónica
Current Perspective	Telefónica is very strong in the global digital workplace market with a very strong core IP voice capability and an expanding customer contact portfolio supported by innovative AI tools and integrated support for business tools such as CRM and workforce management applications. Telefónica's strong presence in markets such as Spain, Germany, Brazil, and the UK helps it to differentiate versus other global competitors. Telefónica's 'Intelligent Workplace' strategy seeks to deliver flexible and borderless working with an enhanced human experience. AI is a key driver for this both for supporting human workers and customer contact agents with efficiency and continuous learning tools and increasing automation of CX solutions through the use of AI agents. As part of its workplace proposition, Telefónica has added a new 'Employee Experience' category to its portfolio which will include a growing range of productivity and digital working tools designed to deliver value-added components to common workplace activities as well as employee wellbeing services. Solutions are already available based on Meta VR and Zoom Workvivo. Telefónica's Future Workplace proposition offers a co-created pathway to digital

	transformation building on Telefónica's internal professional service resources based on partnerships with Microsoft, Cisco, and Zoom. Telefónica designs its solutions to work from any device. Telefónica supports both Operator Connect and Direct Routing for Teams, and also offers its own Centrex 365 and Digital 365 IP voice solution as well as Zoom Phone and Cisco Webex Calling. Within the CCaaS world, Telefónica believes that the need for service customization and integration with multiple components (CRM, dashboards, etc.) using APIs. The provider works with multiple contact center partners with Genesys being a primary partner for large enterprises. It also offers solutions based on Zoom Contact Center as a standard product, and it has partnered with Vonage to strengthen both its API and Communications Platform-as-a-Service (CPaaS) capabilities.
Buying Criteria Rating	**Cloud Collaboration Services** Very Strong **Contact Center** Strong **Customer Support** Very Strong **IP Voice** Very Strong
Product Scores	**Very Strong** 
Strengths	. Telefónica can provide PSTN replacement in 45 countries, DDI in (92) countries, toll-free numbers in 143 countries, and universal toll-free numbers in 43 countries. Its solution can be offered with both local and geographic redundancy. . Telefónica has expanded its Employee Business Suite range to offer services based on partnerships with SAP, Salesforce, Dynatrace, and BMC Helix among others. . Telefónica has strengthened the mobile aspect of its solutions with its network-native Secure Workplace DNS filtering service and its Device-as-a-Service mobile device repair and recycling offering. . Telefónica offers a range of AI-powered analytics tools to support its collaboration solutions. It is also working with multiple partners to expand its API capabilities. . Telefónica includes professional services as part of its collaboration services; engagement ranges from vertical-specific trends through to a full diagnostic analysis of the customer's current status.

Product Name	Verizon Business
Current Perspective	Verizon is a leader in the global enterprise market for digital workplace services as it offers compelling IP voice capabilities accompanied by an expanded portfolio of collaboration partners and API capabilities. Verizon has adopted a 'mobility first' strategy for its collaboration portfolio, and its central value proposition could be boiled down to offering a portfolio of team collaboration solutions, which have mobility at their core supported by intelligent network technologies. Verizon is expanding beyond knowledge workers (the 'go-to' segment for team collaboration solutions) to include segments such as field/service workers, fleet managers, and factory employees. Verizon is also looking to address these segments not only individually, but collectively as well and feels its ability to do so is a differentiator. An example scenario involves providing the OneTalk offer to knowledge workers at corporate HQ, while equipping employees on the factory floor with push-to-talk, while supplying workers in the field with ruggedized devices. Verizon Business' consulting organization has 30+ years of contact center experience and contact center-as-a-service (CCaaS) expertise in more than 35 countries. It offers a CX advisory services portfolio of currently seven types of engagements designed to help customers achieve brand loyalty and customer retention, competitiveness, and improved CX / EX.
Buying Criteria Rating	**Cloud Collaboration Services** Leader **Contact Center** Very Strong **Customer Support** Leader **IP Voice** Very Strong
Product Scores	**Leader** 

Strengths	. Verizon is experiencing strong UC growth with its Mobile UC proposition is currently experiencing double-digit growth, as is its CCaaS portfolio; One Talk, its mobile-first phone solution, now boasts over one million lines. . Verizon supports broad global availability, with well over a million UCaaS seats and service to 100+ countries, and Webex Calling availability in the US, Canada, Europe, and APAC. . Verizon has added credence to its mobility-first messaging by being the first provider to launch, in 2023, Verizon Mobile for Microsoft Teams, a natively integrated version of Microsoft Teams Phone Mobile. . Verizon accompanies its UC offering with a compelling security wrap in a way that is clearly resonating with customers as its voice security solutions have more than doubled in revenue YoY. . Verizon offers a range of security services aimed at protecting companies from social engineering cyberattacks. . Verizon has established partnerships to create a catalog of CPaaS solutions and APIs to enable new capabilities, helping Verizon deliver customized solutions for specific business needs.
Limitations	. Verizon is building AI into its collaboration portfolio, but its messaging is not as well developed as competitors such as Orange and Vodafone. . While Verizon is able to offer both collaboration and customer contact as a managed service, its managed services capabilities are less well developed that some of its European peers.
Product Name	Vodafone Business
Current Perspective	Vodafone is a very strong competitor in the global digital workplace market, offering a strong choice of vendors and a wide range of solutions for different profiles of enterprise. The company reports strong momentum for its digital workplace portfolio with a good number of new logo wins during 2025. Vodafone has also embarked on a program to reform its internal customer experience operations using AI and is using this to inspire additions to its collaboration and customer contact solutions. The provider is already beginning to introduce Microsoft Copilot into its 365 propositions and more features from more partners including Chat GPT will follow. Vodafone is repositioning its UC and customer contact portfolio under the Advanced Communications umbrella. This is a long-term strategy that will see incremental releases over the next 24 months and beyond in product and service groups defined as Advanced Voice, Advanced Messaging, and Advanced Solutions. Vodafone is seeking to use internal APIs and partner APIs to make its portfolio highly automated and modular. Advanced Voice is the portfolio area with the most clearly defined roadmap and already available features. Vodafone is partnering with Dubber for cloud-based call recording and call transcript services. It is also working with Hiya to deliver branded calling services on a network agnostic basis starting in the UK. Longer-term solutions will include AI Voice assistant solutions. Vodafone has built a strong partnership with RingCentral which forms the basis of its Vodafone Business Unified Communications (VBUC) proposition. However, Vodafone is increasing its focus on Microsoft Teams as part of a 10-year strategic partnership with Microsoft that was announced in 2024. Vodafone supports Operator Connect and Direct Routing in multiple markets and has launched Teams Phone Mobile in the in the UK and Germany citing strong take up for both. Vodafone is actively migrating its Cisco customer base to VBUC with RingCentral and Microsoft Teams before retiring its Cisco platforms in 2026. Vodafone has consistently had a strong mobile working message within its portfolio and has expanded this with its Boundless Working suite of hybrid working consulting practice and services. Vodafone also offers capabilities such as device-as-a-service, fraud protection, and device security. RingCX has been added to its customer contact portfolio and is now available in the UK and Germany with more countries to follow.

Buying Criteria Rating	**Cloud Collaboration Services** Very Strong **Contact Center** Very Strong **Customer Support** Very Strong **IP Voice** Very Strong
Product Scores	**Very Strong** 
Strengths	. Vodafone has about 4.7 million enterprise end users (SMB and large enterprise) across its collaboration and FMC portfolio. . Vodafone's Global SIP product, now available in 50 countries, offers full compliant PSTN replacement services. SIP is supported over the same set of access services as are available for Vodafone's global WAN portfolio. When coupled with the Interactive Voice capability the solution offers smart routing for inbound voice (80 countries) and geographic redundancy options. . Vodafone offers a strong mobile flavor to its digital workplace portfolio building on its mobile network assets and heritage. Its RingCentral proposition is fully FMC integrated in multiple markets and Teams Phone Mobile is now available in the UK and Germany. . Vodafone is taking advantage of its ten-year partnership with Microsoft to deliver AI such as Voice AI and GenAI proof of concepts. This work is being expanded to partners such as Chat GPT, and Vodafone is working with partner APIs to develop solutions with cross-platform functionality. . Vodafone's partnership with ContentGuru adds differentiation to its contact center portfolio - although its availability is limited to the UK. It also works on a local country basis with other contact center specialists.
Limitations	. Vodafone's global footprint is a strength overall but the availability of different parts of its portfolio across its footprint is mixed with many solutions limited to one or two markets. . Vodafone is now layering in more AI capabilities into its current and planned future digital workplace solutions but it does not offer the richness of AI-powered CX solutions or consulting skills of rivals such as Orange or Telefonica. . Vodafone's CCaaS portfolio lacks depth compared to its major rivals. The launch of RingCX in the UK and Germany is welcome, but it does not close the gap on its own.