



Vodafone Recognized for

2021

Market Leadership

European UCaaS Industry

Excellence in Best Practices

Best Practices Criteria for World-Class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each award category before determining the final award recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. Vodafone excels in many of the criteria in the European UCaaS space.

AWARD CRITERIA	
Growth Strategy Excellence	Technology Leverage
Implementation Excellence	Price/Performance Value
Brand Strength	Customer Purchase Experience
Product Quality	Customer Ownership Experience
Product Differentiation	Customer Service Experience

Growth Strategy Excellence

Amid the disruptions of 2020 and 2021 cloud communications services strongly proved their merits. The ability

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**- Robert Arnold, Principal Analyst,
Connected Work**

to quickly provision communications functionality to users located anywhere, to keep business processes flowing and ensure responsiveness to customers, as well as centrally manage solutions were business-saving capabilities for many organizations worldwide. Already well established as a leading unified communications as a services (UCaaS) provider, Vodafone shined brightly in this environment.

In a dynamic and intensely competitive industry, Vodafone has held a leading share of the European UCaaS market for 10 consecutive years and it continues to add hundreds of

thousands of users to its installed base each year.

With more than 6 million UCaaS seats, Vodafone maintains a dominate share of an otherwise fragmented European UCaaS market. Unlike many of its competitors, Vodafone’s ability to address customers of various sizes and industries, as well as its international presence, offer the provider greater opportunities for growth in Europe and make it less prone to risk of over-reliance on specific countries and customer types.

Brand Strength

Approaching 40 years as a brand, the Vodafone name has become tightly associated with a leading technology solutions provider, creating one of the most valuable global brands in the telecom sector.

As one of the world's largest global mobile and international voice services providers, Vodafone is known and trusted by most businesses and consumers in many regions. As a fixture in the European telecommunications landscape, Vodafone is frequently customers' first choice for their mission-critical communications services.

Owing to a proven track record, financial stability, an extensive partner ecosystem and a well-rounded portfolio, today Vodafone tops the list of providers that customers choose to lead them on their digital transformation journeys. Specifically, tens of thousands of European end-user organizations seek Vodafone as a strategic partner as they evolve their solutions stack to drive efficiencies and productivity, capture emerging opportunities and create differentiation in their respective markets. Omni-channel contact center, rich video conferencing, advanced mobility, robust team collaboration, programmable communications, as well as automation and insights through artificial intelligence are some of the contemporary functionalities customers are harnessing for digital transformation supported by Vodafone's expertise and resources.

As the company entrenches itself as a digital transformation partner for end user organizations, Vodafone is well positioned to grow in step with its customers.

Technology Leverage

Vodafone has a long track record of leveraging technology from top vendors to tailor services for customers with differing needs. For example, co-innovation partnerships with Atos, Celfocus, BroadSoft, Cisco, and Microsoft have played a key role in enabling Vodafone to establish its highly successful One Net Express, Business and Enterprise offers.

With wide-ranging experience in connectivity, mobility, convergence, and the Internet of Things (IoT), Vodafone continues to evolve its portfolio and technology relationships that help it to grow its customer base and expand its reach.

Recent examples include:

- Leverage of its 4G/5G network which distinguishes Vodafone from most European competitors through compelling mobile services/devices integration with cloud PBX functionality and desktop phones via network fixed-mobile convergence (FMC).
- Compelling programmable communications offerings in partnership with market leader Twilio to help customers digitize and automate workflows.
- The launch of Microsoft Teams and Teams Direct Routing for large enterprises and multinationals across Europe that offers additional flexibility in how and where cloud-based Microsoft telephony and conferencing services are implemented.
- The launches of a collaboration overlay to One Net Business in Italy and Spain, and Webex Teams for Vodafone One Net Enterprise and One Net Small Contact Center for SMBs in four countries.
- Strategic Partnership with RingCentral, which provides Vodafone with a leading UCaaS offering in public cloud, high innovation velocity, global coverage, a digital customer experience, and application programming interfaces (APIs) to create vertical-specific solutions.
- UCC platform integrations with Microsoft 365, Google AI and G Suite, Slack, Oracle, and others.
- Infusing AI into collaboration for intelligent meetings, with voice control and scheduling, facial recognition and meeting notes, as well as omni-channel contact center with AI bots, intelligent routing and more.

Vodafone offers an extensive portfolio that can be appropriately matched to customers of varying sizes, industries and requirements. Vodafone is evolving its portfolio daily by leveraging the latest innovations from leading partners to take customer deployments to the next level.

Customer Ownership Experience

Vodafone has a customer-centered vision for the future of UCaaS. Accordingly, the provider continually takes action to ensure it is well aligned on customer challenges and goals in all facets.

- Recent times have shown that a customer's ability to pivot its operation quickly is crucial. The speed at which the provider provisions and iterates on its services is then a crucial enabler. Therefore, Vodafone is focused on a cloud-native future in which its services are provisioned for customers in a matter of hours or days, rather than months.
- Customer alignment also includes expanding the stakeholders in customer UCaaS buying centers to more regularly include line-of-business leaders, in addition to C-level executives and IT. This is allowing Vodafone to develop more specific vertical value propositions and capabilities for its solutions in addition to traditional horizontal value propositions. The approach more fully involves customers in solutions co-creation that increases the value to their organization and provides Vodafone with references to similarly co-create with other end-user organizations.
- Evolving partnerships further demonstrate Vodafone's customer-centered focus. The relationship forged with RingCentral in late 2020 enables Vodafone to deliver the mobile-first, collaboration-rich services that customers increasingly demand in all regions.
- An invigorated Vodafone concentration on the digital customer experience is reshaping the provider's customer relationships with digital automated and assisted AI-powered experiences that customers increasingly expect from leading-edge providers.
- Finally, and to ensure an end-to-end customer satisfaction, customer success management programs establish touch points across customer operations that help Vodafone to create and maintain the intimate relationships that are necessary to monitor solution alignment with customer needs, creation and adjustment of roadmaps, and assuring the full value of UCaaS investments is reaped throughout the customer's digital transformation journey.

Conclusion

Vodafone maintains its leading market share in a highly competitive European UCaaS marketplace owing to its strong brand and presence, well-rounded portfolio, well-designed packaging and clear recognition of evolving customer needs. With its strong overall performance, Vodafone earns Frost & Sullivan's 2021 European Market Leadership Award in the UCaaS industry.

What You Need to Know about the Market Leadership Recognition

Frost & Sullivan's Market Leadership Award recognizes the company that achieved the greatest market share resulting from outstanding performance, products, and services.

Best Practices Award Analysis

For the Market Leadership Award, Frost & Sullivan analysts independently evaluated the criteria listed below.

Growth Strategy Excellence: Company demonstrates an ability to consistently identify, prioritize, and pursue emerging growth opportunities

Implementation Excellence: Company processes support efficient and consistent implementation of tactics designed to support the strategy

Brand Strength: Company is respected, recognized, and remembered

Product Quality: Products or services receive high marks for performance, functionality, and reliability at every stage of the life cycle

Product Differentiation: Products or services carve out a market niche based on price, quality, or uniqueness (or some combination of the three) that other companies cannot easily replicate

Technology Leverage: Company is committed to incorporating leading-edge technologies into product offerings to enhance product performance and value

Price/Performance Value: Products or services provide the best value for the price compared to similar market offerings

Customer Purchase Experience: Quality of the purchase experience assures customers that they are buying the optimal solution for addressing their unique needs and constraints

Customer Ownership Experience: Customers are proud to own the company's product or service, and have a positive experience throughout the life of the product or service

Customer Service Experience: Customer service is accessible, fast, stress-free, and of high quality

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 Engine™

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

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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:

- **Mega Trend (MT)**
- **Business Model (BM)**
- **Technology (TE)**
- **Industries (IN)**
- **Customer (CU)**
- **Geographies (GE)**

