

VERIZON RECEIVES THE 2023 MARKET LEADERSHIP AWARD

Identified as best in class in the VoIP access and SIP trunking industry

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. Verizon excels in many of the criteria in the in the VoIP access and SIP Trunking 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

Product Differentiation

Since its initial launch, Verizon has always stood out among North American voice over Internet Protocol (VoIP) access and Session Initiation Protocol (SIP) trunking services providers, in large part due to the provider’s ability to pioneer innovative solutions and consistently push new capabilities to market to enhance customer value.

Verizon launched its VoIP access and SIP trunking services long before most of its competitors. While many of those early solutions required businesses to centralize their UC platforms to support SIP trunking, Verizon created flexible deployment options to allow for distributed environments across enterprise sites. Distributed enterprise deployments evolved into Verizon’s Burstable Enterprise Shared Trunking (BEST), which enabled customers to treat their telecommunications resources as a collective pool, sharing idle resources among all their locations, as well as consolidating voice services under a single bill. Verizon then followed up with BEST+, enabling customers to boost their total voice capacity to meet unexpected surges in overall voice traffic.

For customers that do not require the full capabilities of Verizon’s IP Trunking service, the provider also offers a VoIP Essential Feature package. VoIP Essential Feature offers many of Verizon’s most popular capabilities, including BEST and on-net calling, but scales back on some of the enterprise-class features to offer a lower overall cost to the customer. This more economical solution brings Verizon’s vast network and services within reach of the particularly cost-conscious business. Similarly, Verizon allows its IP

Trunking customers to choose between usage-based billing at per-minute rates or capacity-based pricing tied to the number of concurrent call paths, which enables predictable monthly billing. Overall, Verizon differentiates from competitors by consistently matching its solutions to exacting customer requirements. The provider understands the inherent flexibility of IP-based communications services, and over the last fifteen years, has repeatedly leveraged it to full effect to the delight of its customers.

Verizon's differentiation through innovation continues today. As many of its enterprise customers consider migrating from legacy on-premises PBX and UC platforms to cloud-based platforms, Verizon is

“Verizon’s market share success is inherently tied to its broad range of VoIP access and SIP trunking services that address the evolving enterprise communications market, as well as its ability to tailor solutions to different customer types in terms of size, budget and technology requirements.”

**- Michael Brandenburg,
Senior Industry Analyst, Connected**

prepared with value-added services such as session border controllers as a service (SBCaaS) and Verizon Calling with Microsoft Teams. In addition, the provider has professional services resources available to assist customers in determining the best communications strategy, solution design, and deployment model, and the ability to create custom-managed services to fit the customer's exact needs.

Verizon's market share success is inherently tied to its broad range of VoIP access and SIP trunking services that address the evolving enterprise communications market,

as well as its ability to tailor solutions to different customer types in terms of size, budget, and technology requirements.

Technology Leverage

Over the more than fifteen years that Verizon has offered VoIP access and SIP trunking services, the provider has also steadily evolved its platforms and technical prowess to better address market conditions and customer needs. Verizon brings a wealth of technologies to solve customer challenges, both in terms of advanced capabilities inside its VoIP platform and value-added services and solutions that complement and enhance its VoIP and IP Trunking portfolios.

To accelerate deployments and lower the investment costs of SIP trunking migrations, Verizon's network services team offers several flavors of SBCaaS. With SBCaaS, Verizon customers can leverage Ribbon SBCs deployed in Verizon's data centers, rather than on their own premises. With expert teams skilled in the Ribbon products, SBCaaS combined with IP Trunking delivers an optimized and integrated SIP trunking deployment experience for customers of any size or scale. By leveraging the full capabilities of its network and service offerings, Verizon sets itself apart from competitors in meeting the varying needs of its customers.

For enterprise customers seeking to standardize on Microsoft Teams, including Teams Phone for external PSTN calling, Verizon has introduced Verizon Calling with Microsoft Teams. Verizon Calling is a managed SBCaaS offer specifically designed to quickly integrate the provider's IP Trunking, as well as third-party SIP trunking services, into a customer's Teams Phone cloud PBX. With a straightforward, per-user/month pricing model, Verizon Calling with Microsoft Teams is a value-added service that offers advanced call routing, administrative, and analytics capabilities to existing SIP trunking services.

For less complex Microsoft Teams deployments, the provider offers Verizon VoIP for Operator Connect. Operator Connect offers customers a direct and highly automated link between Verizon and Microsoft to deliver PSTN voice services into the Microsoft Teams Phone platform. Once configured for a Verizon customer, a company's telephone numbers can be provisioned and administered directly from the Microsoft Teams admin portal, completely abstracting the challenges of number and SIP trunking

“Over the more than fifteen years that Verizon has offered VoIP access and SIP trunking services, the provider has also steadily evolved its platforms and technical prowess to better address market conditions and customer needs. Verizon brings a wealth of technologies to solve customer challenges, both in terms of advanced capabilities inside its VoIP platform and value-added services and solutions that complement and enhance its VoIP and IP Trunking portfolios.”

**- Michael Brandenburg,
Senior Industry Analyst, Connected Work**

management for IT staff.

Finally, to round out calling options within the Microsoft Teams ecosystem, Verizon has launched Verizon Mobile for Microsoft Teams. This solution enables the simplicity of single-number reach for corporate-liable mobile devices within the Microsoft Teams platform. Once activated, a Verizon Mobile user can leverage the device's native dialer to make and receive calls, call the extension of any other Teams user within the organization, as well as make and receive PSTN calls on the Teams desktop client from the same number.

Verizon is presently the only service provider in North America that can offer a mix of Direct Routing, Operator Connect, and Teams Phone Mobile to its enterprise customers.

Implementation Excellence

Verizon is one of few service providers in the North American market with a full line of wireless, wireline, and IP-based services and networks for both businesses and consumers and has consistently leveraged its abundant resources to great effect. While several Verizon competitors are unable or unwilling to link their wired and wireless networks, Verizon strives to create synergies across all its networks, treating all its services as a unified set of resources to meet specific business requirements. For example, Verizon has long offered the VoIP IP Enterprise Routing (VIPER) feature, which allows “on-net” rates by keeping voice traffic among customer organizations on Verizon's network, without touching the public switched telephone network (PSTN) meaning that customers would not incur usage cost for those calls.

While Verizon's competitors offer intra-company on-net calling, only Verizon extends this reduced rate for calls among subscribers. In another example, by working through partner programs such as Cisco Webex Cloud Connected Audio and Microsoft Direct Connect Audio Conferencing, Verizon can incorporate a customer's IP Trunking to serve as the audio dial-in function of online meetings, making those calls on-net as well. Further extending its synergies, Verizon offers Wireless Connected VoIP, whereby no usage rate is applied to SIP trunking calls made to Verizon Wireless users from US locations. Equally important, Verizon is pushing the bounds of where it can deliver its VoIP access and SIP trunking services and is able to provide a high-quality VoIP connection both on and off its global network. In addition to its traditional dedicated multi-protocol label switching (MPLS) or wired access links, Verizon offers SIP trunking services across its wireless Long-term Evolution (LTE) network, its fiber optic broadband Fios network for home and small business users, as well as over software-defined wide-area networks

(SD-WAN) and third-party broadband access. Looking forward, Verizon plans to support IP trunking across both its private and broadband 5G wireless networks, offering another connectivity option for its customers.

Each of these access options opens a wealth of opportunities and use cases. For example, Verizon offers VoIP services across its wireless LTE network with full quality of service (QoS) support. For Verizon's customers, the use cases for SIP trunking services deployed across LTE are almost endless. With support for up to a dozen SIP trunks, businesses have a new option to provide wireless backup to support mission-critical voice platforms. VoIP with Wireless LTE Access can also accelerate deployments by offering temporary or primary access to remote business locations. This innovative capability empowers businesses to create new operational models. Pop-up or seasonal sites can be quickly spun up or down with the full suite of voice services readily available. Highly mobile applications, such as construction sites or emergency response teams, can now take advantage of business-grade solutions instead of making do with the limited features of consumer mobile services and cell phones.

Support for SIP trunking over Fios or over the top of third-party broadband services enables Verizon to attract smaller customers that may want to leverage the capabilities of IP-based trunking services, but are not ready to commit to an often-costly MPLS network. By layering managed SD-WAN on top of the broadband link, customers are assured of a QoS support for their mission-critical voice communications. These use cases and synergies will only become stronger and scale better as Verizon's wireless 5G network becomes ubiquitous.

Customer Ownership Experience

With the breadth and depth of its VoIP services, as well as its capacity to deliver these services in a way that best meets unique customer requirements Verizon enables excellent customer ownership experiences. By leveraging standards-based SIP technologies, the company's platform supports flexible interoperability with other SIP-based platforms and devices. Verizon Business' IP Integrated Access (IPIA) services are marketed as analog or TDM trunking replacement alternatives. Now making up less than half of Verizon Business' VoIP deployments, IPIA offer businesses with legacy key systems or time division multiplexing (TDM) private branch exchanges (PBXs) the ability to leverage next-generation VoIP services without an expensive forklift of their telephony solutions.

Verizon also offers IP Trunking, specifically catering to businesses deploying fully IP-based communications. This service now constitutes just over half of Verizon Business' services and continues to experience very high growth rates as businesses increasingly migrate their premises-based communications solutions to IP-based platforms. Customers migrating to cloud-based communications like Microsoft Teams Phone can continue to leverage Verizon's IP trunking services, taking advantage of cost-effective pricing, high quality of service, and advanced feature sets.

Verizon offers additional capabilities to extend the value of its SIP trunking services. Those include shared trunking through BEST; bursting capabilities with BEST+; enterprise-level concurrent calls and on-net routing; and multi-site, multi-country deployment options. Customers are given access to detailed traffic reports as well as a centralized management dashboard, allowing customers to leverage a fine grain of control over their deployed services.

Brand Strength

Verizon is a well-established brand among both business decision makers and consumers. Verizon is among the leaders in the North American market for residential and business wireless services, with the Verizon brand front and center as the company evangelizes the shift to 5G networks in print, TV and digital campaigns. In addition, Verizon has a rich history and a strong track record in the wireline telecommunications services market. North American businesses as well as organizations around the world trust the Verizon brand as they associate it with high service quality and reliability and provider stability. Furthermore, the incumbent carrier still retains a significant customer base using TDM-based legacy trunking services, placing Verizon on the short list for many businesses looking to move to IP-based communications solutions. This strong position is reinforced by the myriad of successful VoIP access and SIP trunking deployments Verizon has already achieved. Businesses trust Verizon and in turn, trust that the company can deliver IP-based communications services with strong uptime and minimal disruption.

Conclusion

Verizon's continued market share success in the VoIP access and SIP trunking services market reflects the company's commitment to continuous innovation to its VoIP portfolio. Verizon remains keenly aware of key megatrends affecting customers and the broader enterprise communications market and evolves its solutions accordingly.

For its strong overall performance, Verizon is recognized with Frost & Sullivan's 2023 North American Market Leadership Award in the VoIP access and SIP trunking market.

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™.

[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:

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

