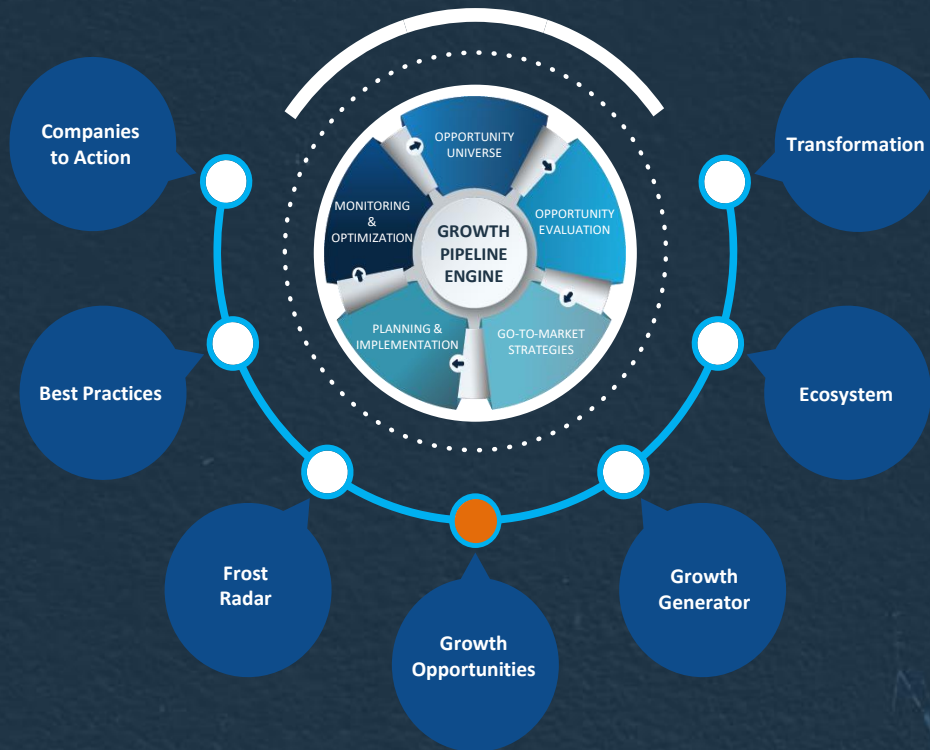


# Growth Opportunities in the Microsoft Teams Phone Ecosystem

## Service Provider Best Practices in the Evolving Business Communications Value Chain

Global Information &  
Communications Technologies  
Research Team at Frost & Sullivan



**Authored by: Elka Popova**  
**Contributors: Robert Arnold**

**KA79-64**

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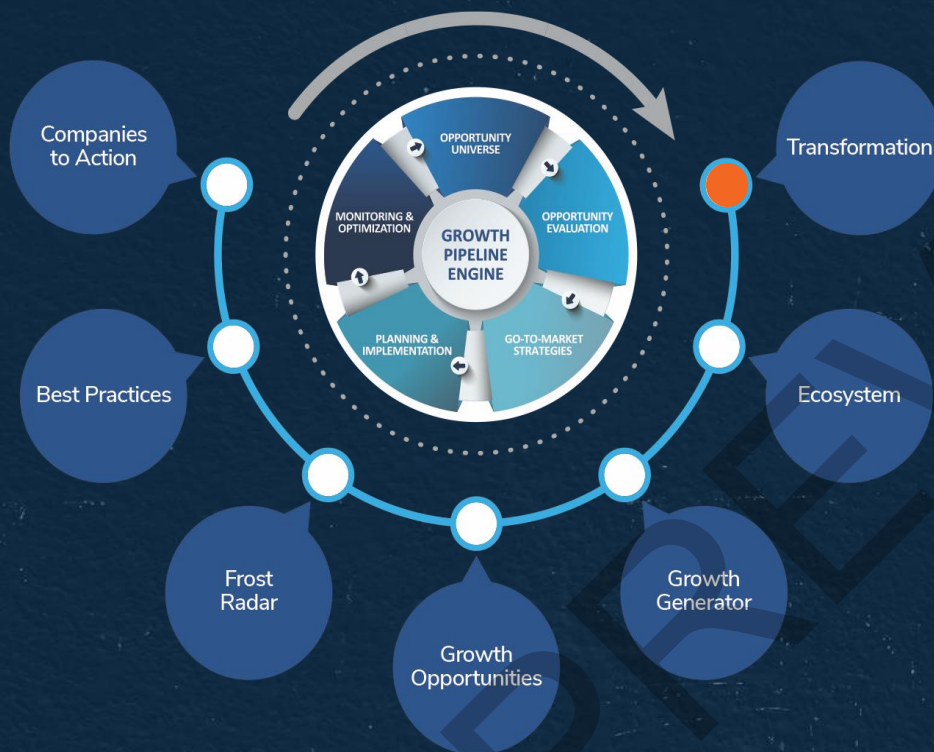
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## Research Objectives and Methodology



# Research Objectives and Methodology

Frost & Sullivan's 2024 IT decision-maker (ITDM) survey was conducted to gain insights on the following end-user organizations' priorities:

- Current communications and collaboration technology adoption rates and future adoption plans.
- Current adoption and future demand for Microsoft Teams Phone, Microsoft Teams Phone Mobile, and public switched telephone network (PSTN) enablement of Teams environments.
- Preferences among available PSTN deployment options, including Direct Routing, Operator Connect, and native mobile dialer offerings, such as Teams Phone Mobile.

The overall research objective of this study is to measure the current use and future decision-making behavior toward communications and collaboration solutions across industry verticals, customer segments, job roles and geographic regions. More specifically, this study provides an analysis of the threats and opportunities for telecommunications operators, service providers, and technology vendors emerging from the growing adoption of Teams Phone.



## Respondent Profile and Methodology

**Field work:** January-February 2024

**Respondents:** IT/telecom decision makers

**Total sample:** N=1,218 with quotas by:

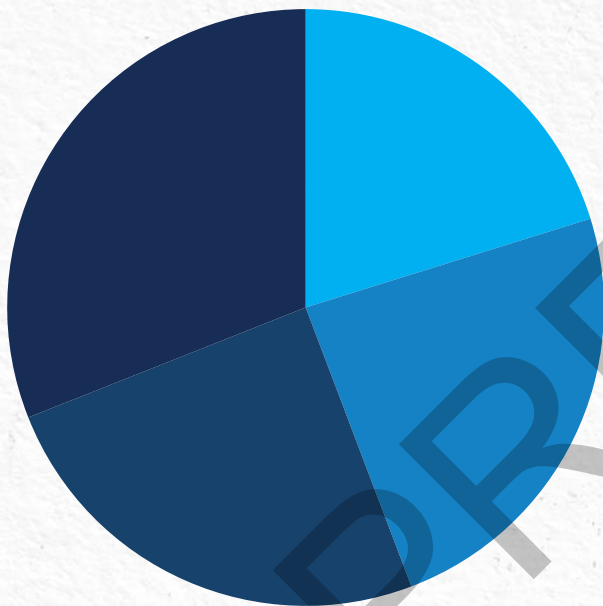
- by country
- by region
- by industry
- by company size

**Sample answering enterprise telephony questions:** N=416

**Study period:** 2024–2027

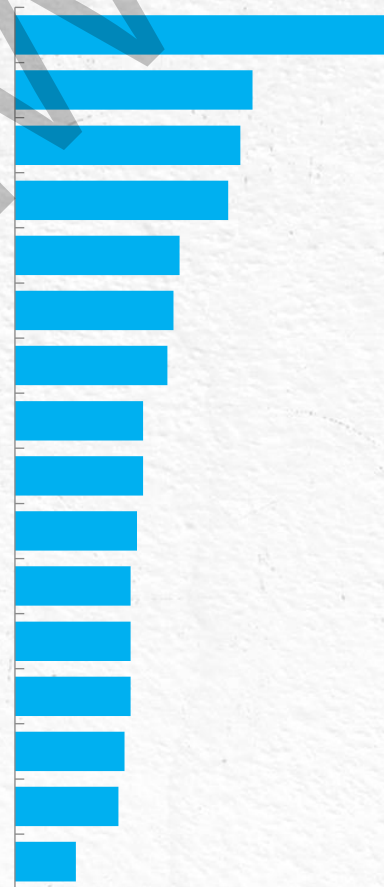
# Respondent Demographics

ITDM Survey Respondents by Region, Global, 2024



S1. Respondent demographics by region. N=416.

ITDM Survey Respondents by Country, Global, 2024

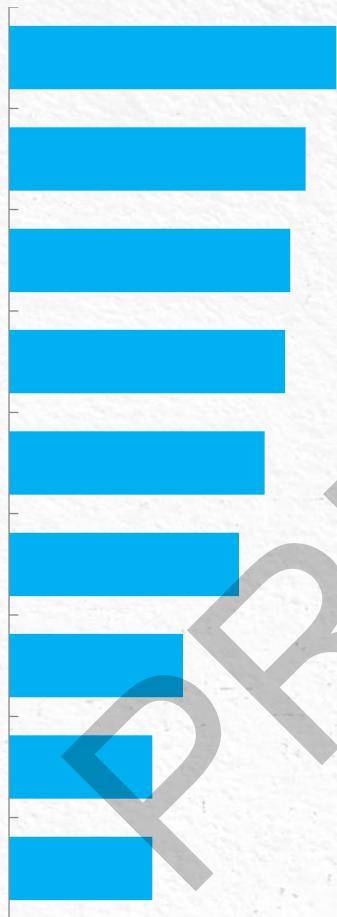


S1. In which country are you based? N=416.



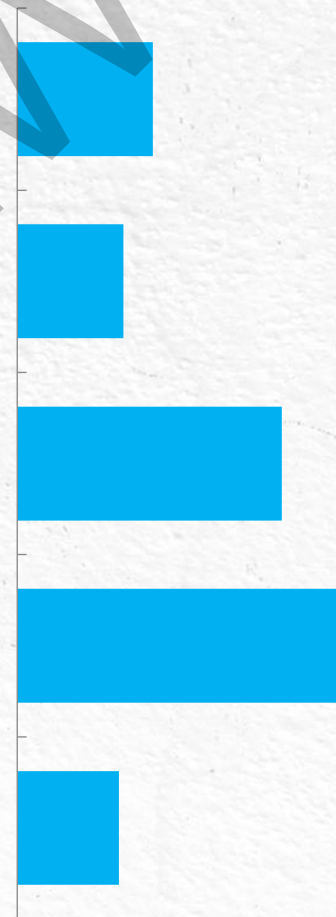
## Respondent Demographics (continued)

ITDM Survey Respondents by Industry Sector,  
Global, 2024

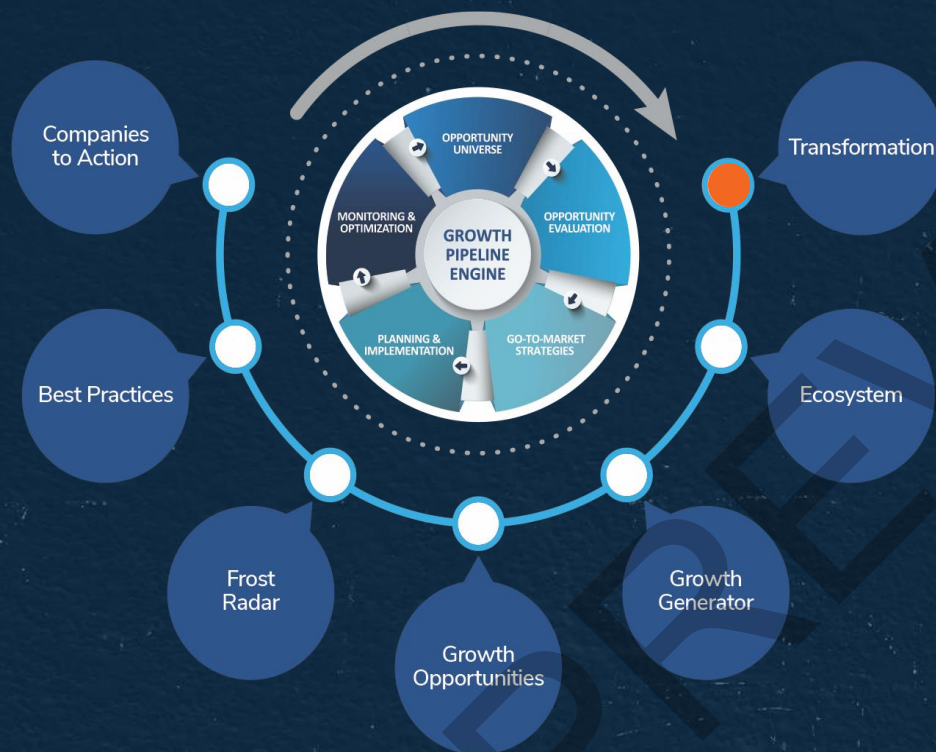


S1. Respondent demographics by industry. N=416.

ITDM Survey Respondents by Size of Organization,  
Global, 2024



S25. Respondent demographics by size of organization. N=416.



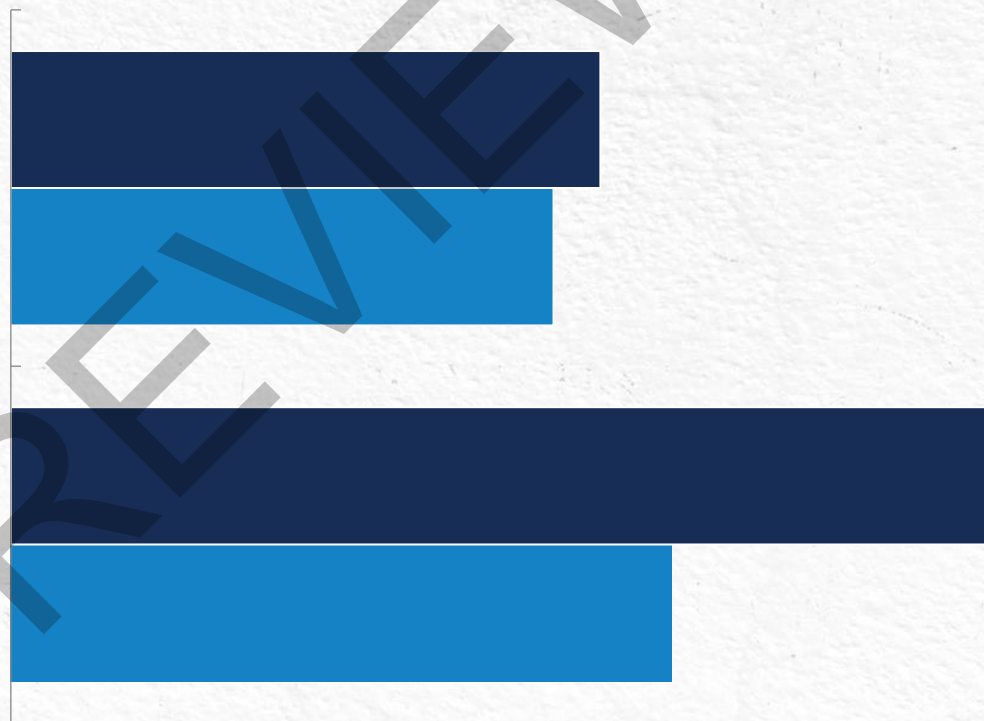
## Growing Cloud/Mobile PBX and Microsoft Teams Phone Adoption



# Cloud/Mobile PBX and Microsoft Teams Phone Adoption

By 2026, 91% of organizations will have adopted cloud or mobile PBX solutions. Whether deployed alongside premises-based telephony systems and/or third-party cloud PBXs, or as the sole cloud PBX, Microsoft Teams Phone is among the leading contenders for adoption among organizations.

## Cloud or Mobile PBX Services Adoption versus Microsoft Teams Phone Adoption, Global, 2024–2026



## Current Cloud or Mobile PBX/UCaaS Solutions/Providers

Most organizations with existing investments in cloud or mobile PBX solutions use more than one solution or provider. Those with Microsoft Teams Phone deployments are no different, suggesting that Teams Phone is often deployed to complement existing solutions, most likely in support of remote workers or to address knowledge-worker needs.

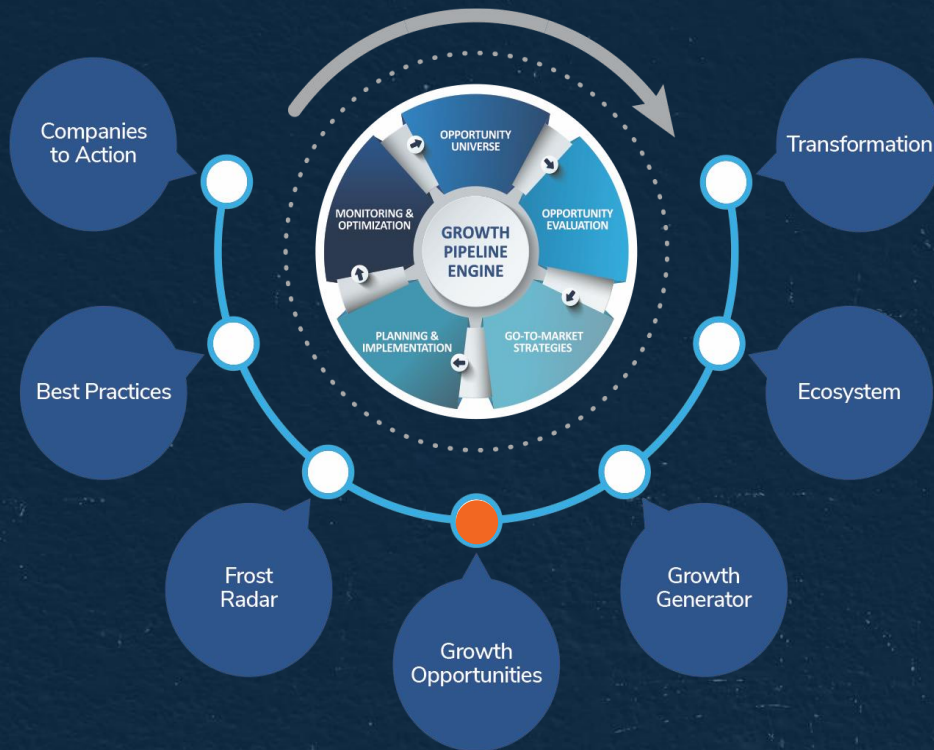
Number of Current Cloud or Mobile PBX Solutions/Providers, Global, 2024–2026



Q26. Which option regarding your cloud or mobile PBX/UCaaS solutions most closely matches your organization's current usage? N=143

Q26. Filtered by Microsoft Teams Phone Users: Which option regarding your cloud or mobile PBX/UCaaS solutions most closely matches your organization's current usage? N=130



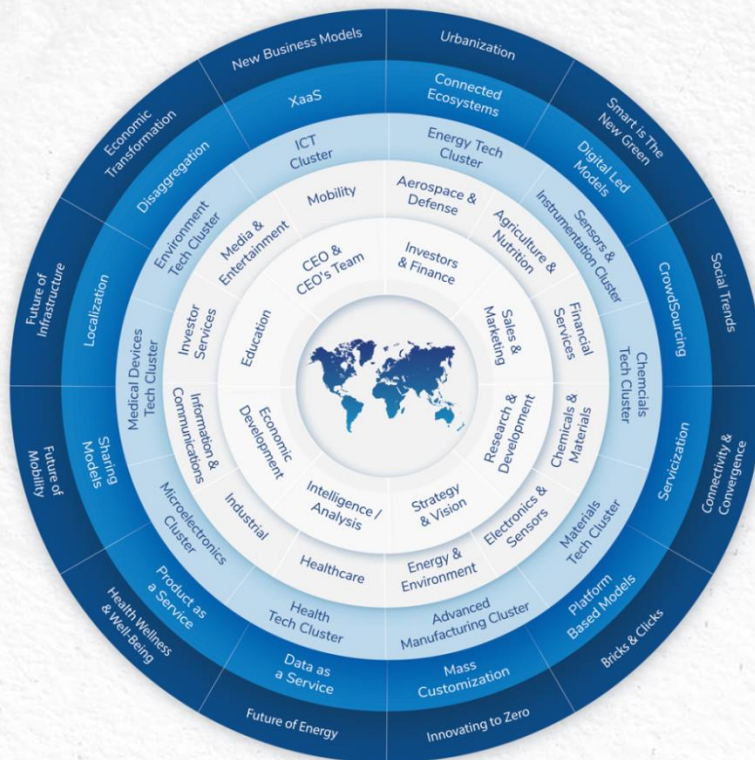


## Appendix

# Growth Opportunities Fuel the Growth Pipeline Engine™



## The Innovation Generator™



Analytical  
Perspectives



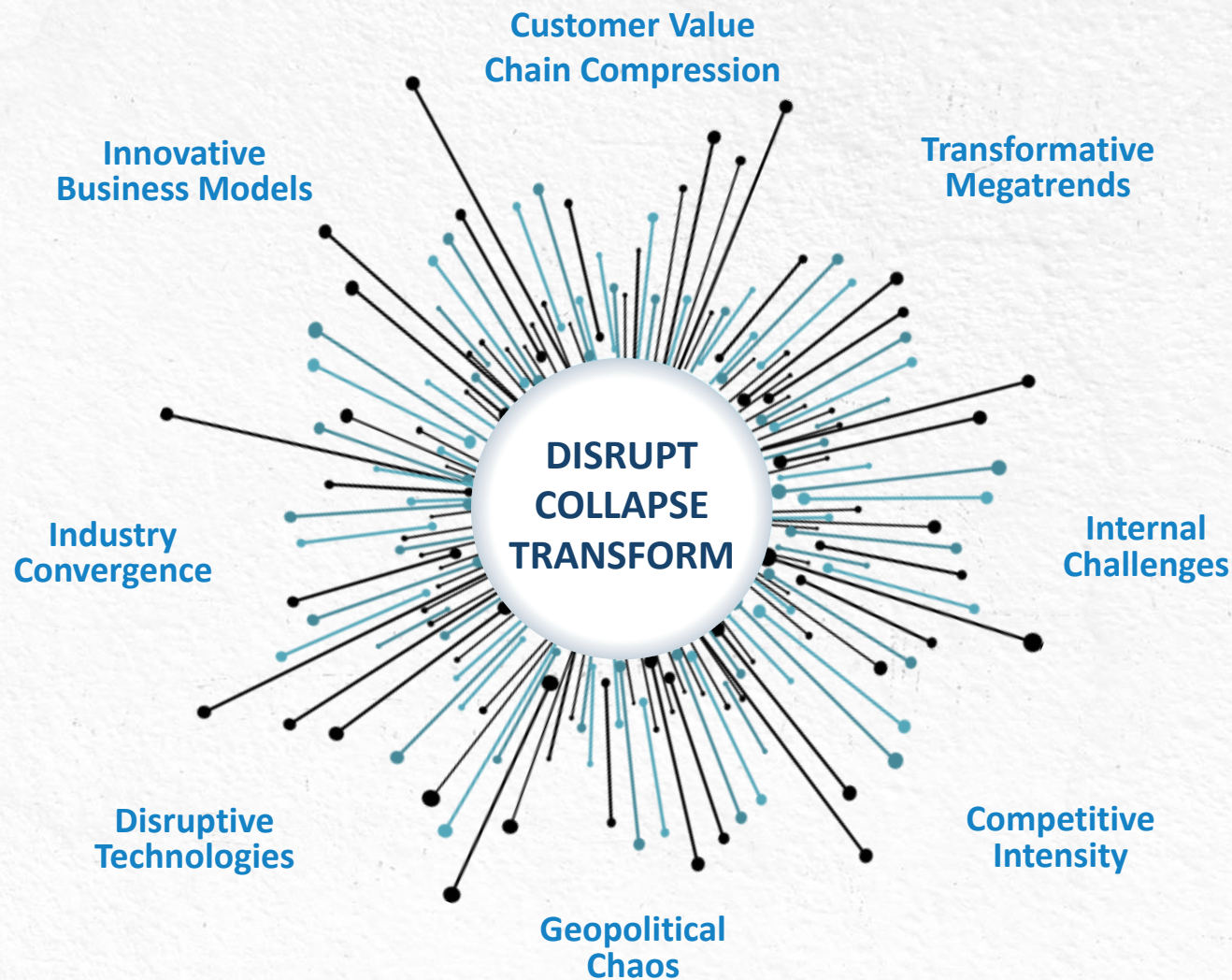
## The Growth Pipeline Engine™





# Why is it Increasingly Difficult to Grow?

The Strategic Imperative 8™: Factors Creating Pressure on Growth



# The Strategic Imperative 8™

## Innovative Business Models

A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning

## Customer Value Chain Compression

Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables reduction in friction and the number of steps in customer journeys

## Transformative Megatrends

Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives

## Internal Challenges

The internal organizational behaviors that prevent a company from making required changes

## Competitive Intensity

A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance

## Geopolitical Chaos

Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security

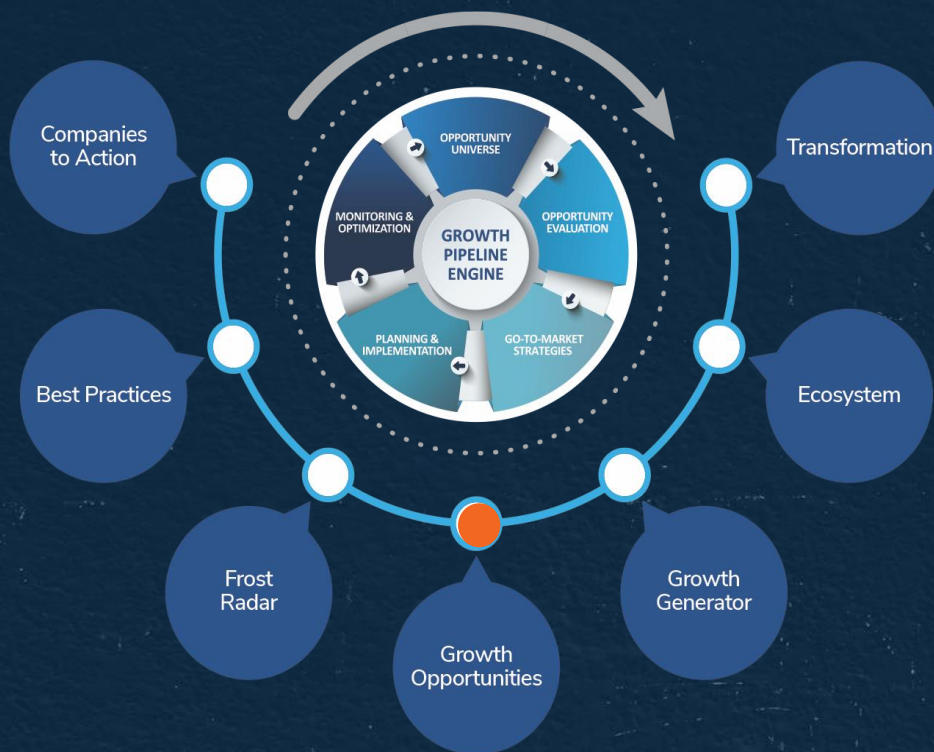
## Disruptive Technologies

New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate

## Industry Convergence

Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities





## Next Steps

How does your organization identify and prioritize Growth Opportunities?

# Benefits and Impacts of Growth Opportunities



**Which of these benefits would be most important to your Investor-Customer-Employee?**



## Next Steps



**JOIN:**  
Growth Council

**APPLY:**  
Companies to Action

**ENGAGE:**  
Growth Dialog

**PARTICIPATE:**  
Growth Council Think Tank

**Does your current system support rapid adaptation to emerging opportunities?**

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