



Mobile Network Operators Have the Edge When It Comes to Unified Communications

Mobile-native Experiences for SMBs and Enterprises

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Mavenir Mobile Business Communications and Collaboration

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Mavenir is the industry's only End-to-End, Cloud Native Network Software Provider, redefining network economics for Communication Service Providers (CSPs). Our innovative solutions pave the way to 5G with 100% software-based, end-to-end, Cloud Native network solutions. Leveraging industry-leading firsts in VoLTE, VoWiFi, Advanced Messaging (RCS), Multi-ID, vEPC and vRAN, Mavenir accelerates network transformation for more than 250+ CSP customers in over 130 countries, which serve over 50% of the world's subscribers.

We embrace disruptive, innovative technology architectures and business models that drive service agility, flexibility, and velocity. With solutions that propel NFV evolution to achieve web-scale economics, Mavenir offers solutions to CSPs for revenue generation, cost reduction, and revenue protection.

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Contents

Addressing the challenges of Mobile Network Operators..... 4

The limited UCC offer for businesses today..... 5

 Key systems or PBX with desk phones 5

 Corporate mobile phones 5

 BYOD policy 5

 UCC/UCaaS solutions 6

The problem with conventional UCC: The decline of the desk phone 7

Mobility is winning and MNOs should leverage their privileged position..... 9

Using the network to counter the OTT threat 10

Small Businesses: A market in need of consumer-like experiences 12

Large Enterprises: A market in need of mobility 13

Addressing business mobility needs with Mobile-Native UCaaS..... 14

White-Label UCaaS: Minimal risk for SMB deployments..... 16

 Advantages of deploying a third-party UCaaS solution in an MNO environment 17

How Mavenir enables the MNO with solutions for business mobility 18

 Available White-labeled from Mavenir’s cloud 19

Conclusion 20

References..... 21

Table of Figures

Figure 1 Messaging should be as ubiquitous as voice..... 7

Figure 2 Quality of service with traditional UCC solutions 8

Figure 3 Conventional UCaaS vs. Mobile-native UCaaS 15

Figure 5 Mavenir’s Mobile Business Communications and Collaboration benefits..... 18

Figure 6 Mavenir’s mobile-native user interface—a frictionless, consumer-like experience 19

Addressing the challenges of Mobile Network Operators

Mobile network operators (MNOs) continue to invest heavily to cope with the ever-expanding growth in subscriber numbers and bandwidth needs.

For MNOs worldwide, each technology turn—3G, 4G, IMS, LTE, and now 5G—has translated into massive infrastructure expenditure. Despite those investments, MNOs are under intense pressure in the saturated consumer market, seeing flat growth in net number of subscribers, forced into price wars on voice and data plans, and heavily disrupted by voice and messaging over-the-top (OTT) applications—such as WhatsApp, FaceTime, and others—that have eroded their consumer revenue.

With lagging growth opportunities in the consumer segment, MNOs seek new revenue opportunities on the business segment and, specifically, the Unified Communications and Collaboration (UCC), which has seen a solid growth (16.8% CAGR¹) and delivers higher ARPU and customer stickiness. Many, however, have gone to market with conventional third-party Unified Communications-as-a-Service (UCaaS) solutions that are built around a desk phone, use walled-garden instant messaging ecosystems, and run on best-effort OTT mobile-data applications that render a lower quality of service (QoS) when compared to native MNO network services.

In contrast, the communication needs of businesses of all sizes have significantly evolved due to workforce mobility. Today, 80% of the global workforce does not sit at a desk,² and desk workers are away 50-60% of the time.³ Those users need mobile solutions. As a result, 50% of them are already using their personal mobile phones for business purposes, and 80% are using text messaging for business interactions.⁴

Texting is now front and center, with 89% of consumers looking to interact with a business via text.⁵ When a business calls them, 58% of consumers respond to missed calls not by calling back, but by texting.⁶ Businesses need solutions that enable messaging with their customers.

These wireline-native UCaaS solutions, focused on the office worker, have not been a good fit for the communication needs of today's businesses, and particularly for the Small and Medium Business (SMB) market segment, which represents a huge potential market for the MNO, considering 99% of businesses have fewer than 500 employees.⁷

In this paper, we identify the MNOs' key advantages and their ability to disrupt the UCaaS market with mobile-native UCC solutions that leverages their existing investments in mobile infrastructure to provide mobile-first experience for *deskless* workers and opens the underserved SMB segment. As a natural extension to the consumer business, the SMB segment represents a significant and lucrative opportunity that can be exploited with solutions owned and operated entirely by the MNO.

The limited UCC offer for businesses today

In order to provide the mobility that their employees need and the accommodate the interactions their customers expect, businesses have four available options:

1. Key systems or a PBX with desk phones
2. Corporate mobile phones
3. Bring Your Own Device (BYOD) policies
4. Unified Communications and Collaboration (UCC) solutions

Key systems or PBX with desk phones

Businesses can continue using the same systems they have always used. These systems are familiar, inexpensive, and provide reliable and predictable service. However, they are stuck in the past and cannot provide the mobility that workers need, thus desk phones and some kind of mobile phone solution must be deployed independently. In addition, they do not provide the user experience SMBs need—extension dialing and feature access codes are a thing of the past—and, from the customer perspective, they do not answer the problem of being able to text message with a business line.

Corporate mobile phones

Businesses can choose to purchase mobile phones and consumer services for their employees. This option addresses mobility, messaging capability, keeps the business in control of the customer relationship, and can provide a mobile-centric user experience.

However, this option requires CAPEX, OPEX, and ongoing maintenance by the business, and this becomes particularly overwhelming for the SMB segment. Someone has to administer the accounts. SMBs need to come up with a corporate policy for features like Caller ID and name delivery. They also need a policy to determine which employees get phones and which do not. And, if they decide to avoid the complexity and go with consumer mobile services, these do not provide the advanced business features that an SMB needs in today's evolved market. Group and advanced business features are limited or nonexistent.

From the worker perspective, this introduces a second phone in their daily lives and juggling separate phones for personal and business use is inconvenient. If they leave the work phone at home, the customer relationship is left as well.

BYOD policy

Bring your own device (BYOD) movements seemed to be the solution to some of the heavy costs of communications for smaller businesses. However, should businesses rush to embrace BYOD? At first, it seems like a good idea, as it provides the mobility and messaging capabilities needed, while allowing the employee to keep their number and, more importantly, the device they are accustomed to using every day. It also saves the business from having to manage the accounts, which translates in additional savings.

However, a BYOD policy shares the problems of Caller ID and name delivery, and the lack of group and advanced business features that corporate mobile phones have, while adding additional complications. With

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BYOD, the business has no view of the interactions between the employee and the customer, so security and compliance are a major concern. What happens if an employee leaves the company? They take the number and the customer relationship with them. And there is the complicated process of how to reimburse employees for using their own device and service, which can erode the cost savings.

There is also the problem of work/life balance for the employee. There is nothing to prevent a customer from calling them, whether they are at home, the gym, or on vacation. Employees need a way to turn off the business calls without turning off their personal ones.

UCC/UCaaS solutions

Many large enterprises have deployed UCC or UCaaS solutions successfully, at significant effort and cost, but still making it a good investment when factoring the cost savings and the employee performance improvements. After all, UCC/UCaaS is the evolution of business communications:

- It can provide all of the business features enterprises and SMBs require.
- Mobility is typically provided through a mobile app, thus leveraging the advantages of BYOD or corporate mobile phones.
- It can provide one and sometimes several business identities that can be used to keep the company in control of the customer relationship, while also providing better work/life balance for the employee.

So, is UCC/UCaaS the answer? Yes and no.

The problem with conventional UCC: The decline of the desk phone

Despite the rapid adoption of cloud-based UCC services globally, business communication systems remain mired in a legacy paradigm designed around a land line-bound desk phone. The on-premises PBX—initially built on analog, then TDM, and finally IP lines—was upgraded with voicemail, instant messaging, conferencing, collaboration, and mobility features. All of these features are an afterthought to voice and often use the vendor’s proprietary technology. This is especially true for messaging, creating a walled garden in which colleagues can only collaborate with others on the same system, and not reach the customers that they need to interact with on a daily basis.

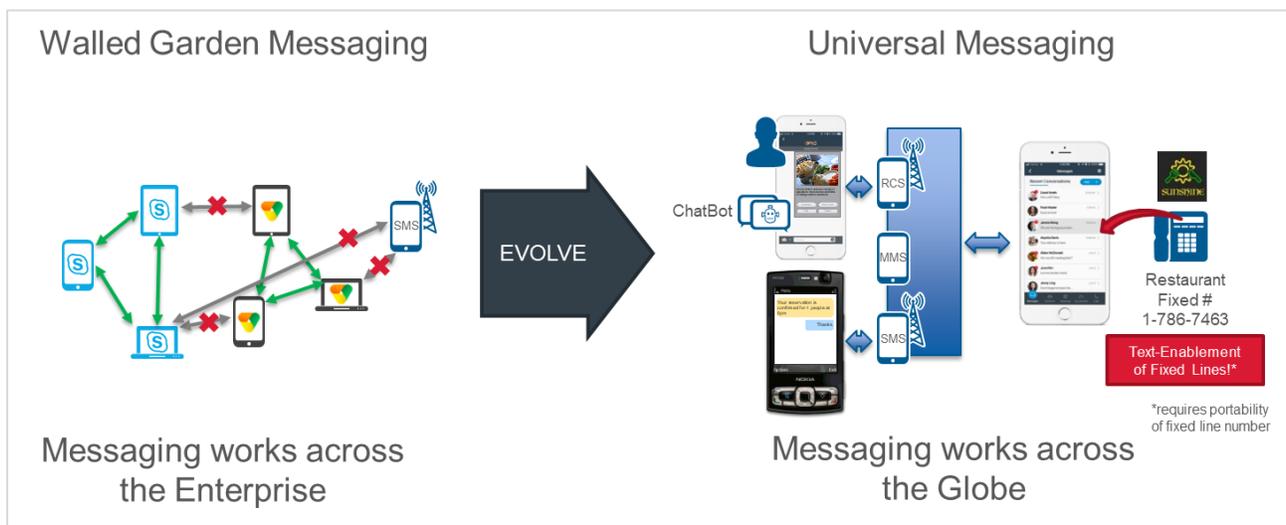


Figure 1 Messaging should be as ubiquitous as voice

When smartphones burst onto the scene and the BYOD phenomenon found its way into the workplace, even the newer conventionally-designed UCC systems became obsolete. Employees, already dependent on text messaging and sharing apps in their personal lives, began using these consumer features in their professional lives, too. The desk phone had officially been declared dead.⁸

UCC vendors, reluctant to leave the desk hardware behind, responded by adding specialty “over the top” (OTT) phone applications to their product lineups. These apps use WiFi or cellular data to bring the landline to the mobile, competing with other user applications in a best-effort wireless channel. Without carrier network integration, there is no prioritization or quality of service (QoS) enforcement. As a result, call quality is poor, hand-overs are more likely to fail, and many of the features users have come to expect on personal phones are not available for them while at work.

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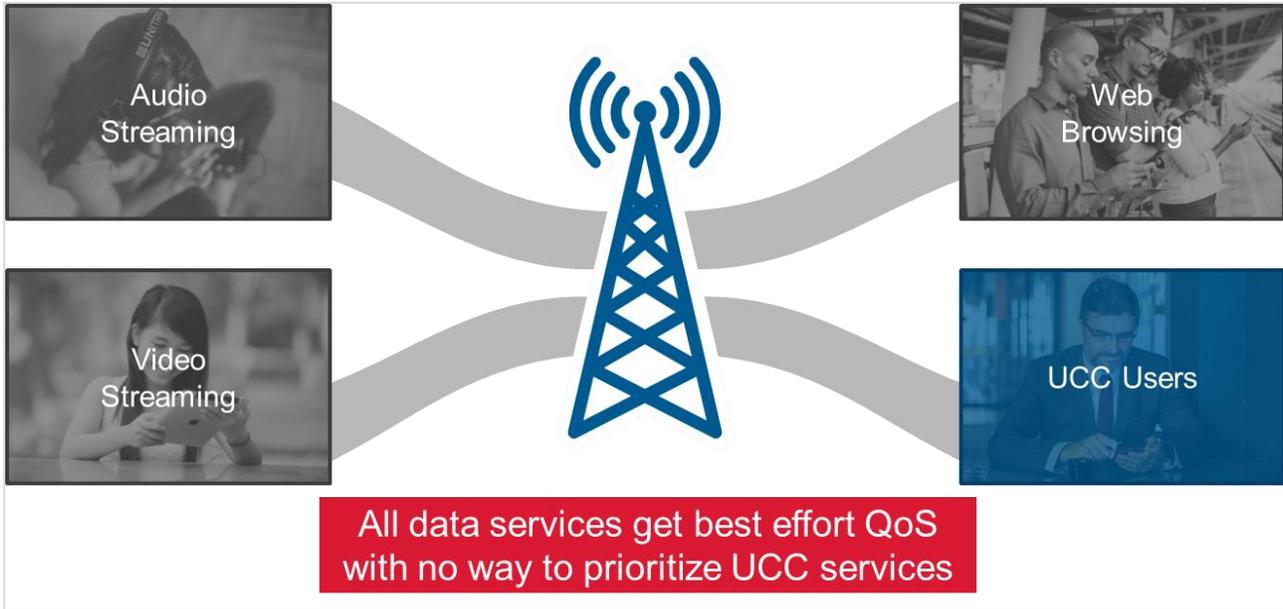


Figure 2 Quality of service with traditional UCC solutions

Technology is not the only obstacle. Enterprises also need to dedicate time and resources toward the evaluation, selection, and integration of a UCC system vendor into their processes, adding operational and financial complexities.

MNO Advantage #1: They already have the business's trust. According to Gartner, 64% of enterprises would trust a telco-based service more than a third-party OTT application.⁹ What's more, enterprises would trust an MNO to fully manage a UCC solution as a natural extension of the mobile services already provided.

Mobility is winning and MNOs should leverage their privileged position

IT departments are already severely constrained by budgets and resources. Addressing the mobile communication problem is typically not high on the priority list. That's one of the reasons why, despite the limitations of current UCC providers, 85% of IT decision makers have moved all or part of their corporate UCC services to the cloud¹⁰ due to scalability, simplified management, and cost reduction.¹¹

There are also a large number of businesses that don't have an IT department—because they are too small to afford it—but their customers and partners still expect the same responsiveness and collaboration capabilities experienced when interacting with large enterprises. For these small businesses, a cloud solution is the only option, and mobility is usually a key requirement.

While employees are already more loyal to their mobile phones than they are to corporate phone systems, IT departments see it as mission-critical to rein in BYOD usage while also improving the efficiency of an increasingly distributed workforce. For smaller businesses it is a matter of finding the right balance between BYOD and an affordable solution to let them keep control of their customers relationships.

MNO Advantage #2: They own strong relationships with both mobile users and business. MNOs, which already have corporate mobile phone contracts in place, are uniquely positioned to provide an improved end-user experience while also addressing the IT needs for cost-effective, secure UCC integrated into a single bill with a single point of contact. The line that separates personal life and work life has blurred, and MNOs are already in possession of the user's personal line with a reliable system they can trust. They can capitalize on that trust to sell a high-quality mobile-native UCC service to business users.

Using the network to counter the OTT threat

With an estimated 650 million UC seats up for grabs by 2021,¹² OTT players, seeking to bypass the mobile network operator altogether, have attacked the market. MNOs, already under siege by smaller communication service providers, have been slow to respond to the threat, even as the cloud giants have also turned their attention to the UCC market. Microsoft entered with Skype for Business and is now transitioning to collaboration with Teams. Amazon launched Chime internally for its own employees and now offers it to any business that wants to pay for it. And Google has launched CallJoy targeted specifically for small businesses.

The fact that these giants—who are looking to extend their already very lucrative core businesses—are dedicating significant resources to enter this SMB market is another strong indicator that there is much money to be made.



In order to compete with OTT players, smaller providers, and cloud providers, MNOs need to leverage their largest investment – their mobile infrastructure.

MNO Advantage #3: They own the mobile network. OTT applications are only enterprise grade. As such, they represent a lower standard of quality than end users now expect in our mobile-native, carrier-grade world. With complete control over their own networks, however, MNOs have the ability to provide applications that are highly integrated with the core network and can guarantee bitrate and latency for the mission-critical voice, video, and collaboration streams required to deliver the superior UCC user experience demanded by modern businesses.

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MNO Advantage #4: They have access to the smartphone's native dialer. Only an MNO can provide a fully-integrated, high-quality, mobile-native user experience for business users that extends the phone's native—and already familiar to the user—features to provide additional collaboration capabilities. With an estimated 86.7%¹³ of all smartphones based on Android, which allows full access to the native dialer (Apple iOS requires a separate app for the dialer), MNOs have a very distinct market advantage in this category.

No matter the smartphone operating system, MNOs are well positioned to address two of the top concerns businesses have with UCC: usability and security.¹⁴ When users have to download, install, and configure entirely new applications with which they are unfamiliar, uptake is considerably lower, and the security risk is correspondingly higher. What business users and IT departments both need—and the MNO can best provide—is a UCC solution natively integrated with the mobile phone, providing a secure experience with a minimal learning curve.

Small Businesses: A market in need of consumer-like experiences

When we look at how mobile network operators segment product offerings, the vast majority have a consumer division (often representing the bulk of the income) and a business division that typically caters to larger enterprises. It is natural that in the effort to optimize their investments, MNOs have focused business targets on activities that yield larger returns and better operational margins. The complexity of deploying conventional UCC solutions requires a considerable level of interaction and joint planning with the customer—such as an assessment of the WiFi and LAN bandwidth during the onboarding phase to determine network carrying capacity—that is cost-justifiable only with large opportunities.

In both Europe and North America, however, more than 80% of all businesses have ten or fewer employees.¹⁵ And this percentage is increasing as the world's workers shift towards small businesses, which historically provide most of the job growth.¹⁶ As a result, there are a very large number of SMBs that need mobile UCC solutions at an affordable price. Most, however, lack either the technical knowledge or the resources (or both) needed to select and install the system. For most of these businesses, a trusted MNO partner that can fully manage their communications as a natural extension of the mobile services already provided is easily the best fit.

MNO Advantage #5: They can provide a secure and private consumer-like experience, including the voice and messaging features with which users are already familiar. Combine that with rich multimedia messaging and collaboration upgrades, minimal start-up times, reduced overall application complexity and fees, and the ability to utilize employees' own devices, and MNOs have the key ingredients to a successful value proposition. And perhaps even more importantly, MNOs already have a massive consumer platform that includes advertising, marketing, and a distributed network of stores that can immediately be enabled to offer consumer-like business services to the SMB segment.

Large Enterprises: A market in need of mobility

When it comes to business communications, the large enterprise has its own unique set of requirements and challenges. It's a truism that the larger the organization, the more specialization of business functions. And consequently, there exists the need for appropriate communications solutions for each business function.

Business communications gets complicated in the large enterprise.

Large enterprises often need complete control over the business's communications methods: securing and archiving data and communication, complying to regulatory requirements, and supporting mobile and remote workers. These organizations typically rely upon PBX infrastructure to satisfy their communications requirements, both for internal and external calling. Modern PBXs support a rich and vast number of business calling features and functions, messaging, presence, VoIP-based endpoints (business IP phones) and connect to the PSTN via SIP trunks. Often the same provider that provides the organization's Internet connectivity provides SIP trunking to the PBX infrastructure.

Challenges arise with managing multiple sites, planning for disaster recovery/business continuity, coordinating the integration and maintenance of varied vendor technologies and implementations, and delivering a common communications policy and user experience. Generally, mobility support is an afterthought for these implementations.

MNO Advantage #6: They can deliver SIP trunking solutions and mobile-native support to the large enterprise, enabling centralized trunk management and routing, call capacity management, identity management, centralized dialplan management, and centralized calling policy. In addition to providing SIP trunking support, the MNO can offer UCaaS services to the enterprise to complement PBX services and support remote and mobile workforce.

Addressing business mobility needs with Mobile-Native UCaaS

To answer the need for fully-evolved, modern, and mobile work environments, a unified communication and collaboration solution delivered as a service (UCaaS) from their mobile network operator and built from the ground up around the mobile user experience is required. Such a solution should have the following characteristics:

- **Mobile centric**—mobile user experience where the smartphone is the primary device and having a desktop phone as a secondary option.
- **Frictionless, consumer-like experience**—easy to onboard as a service added to the mobile plan; intuitive to use, minimizing the learning curve.
- **Unified user experience**—a single interface for voice, video, messaging, and collaboration; no more *swivel-chairing* between mobile applications.
- **Universal messaging**—a mobile-native solution should leverage the MNO's messaging platform to provide a full multimedia messaging experience and should allow businesses to message any phone in the world; no more messaging walled gardens.
- **Outstanding quality of service**—leveraging the mobile network QoS mechanisms to ensure voice, video, and collaboration media are crystal-clear and handovers are seamless.
- **Multi-line and multi-device**—allowing the business users to have multiple phone numbers (personal, business, group, toll-free, etc.) and to connect to those phone numbers from any of their devices (smartphone, tablet, laptop).
- **Secure and clean channel**—the messaging and voice communications between the business and its consumers remain confidential and any metadata belongs to the business, instead of being sold to third parties for advertising or monetization purposes.
- **Enriched with Messaging as a Platform (MaP) capabilities**—to allow businesses to leverage the latest advancements in chatbots and A2P/B2C messaging to increase their business visibility and revenues.
- **Simple management interface**—most functionalities should be managed from the mobile itself, but a web portal can be used for more advanced options such as administering cloud PBX features, adding or deleting users, configuring auto-attendants, or managing corporate policies. Simplicity and self-administration are critical for the SMB segment, where businesses usually lack IT staff.

Currently, there are very few solutions on the market that meet all of these criteria. With research firms predicting a 16.8% CAGR for cloud-based telephony and messaging through 2025,¹⁷ however, the window of opportunity for MNOs will not be open for long.

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MNO Advantage #7: They already have most of the components required. With components such as VoLTE and VoWiFi, RCS messaging, IMS, and Policy Control and Routing Function (PCRF) for quality of service control, and massive amounts of radio spectrum, incumbent MNOs have a privileged position to capture the SMB space with a mobile-native UCaaS solution.

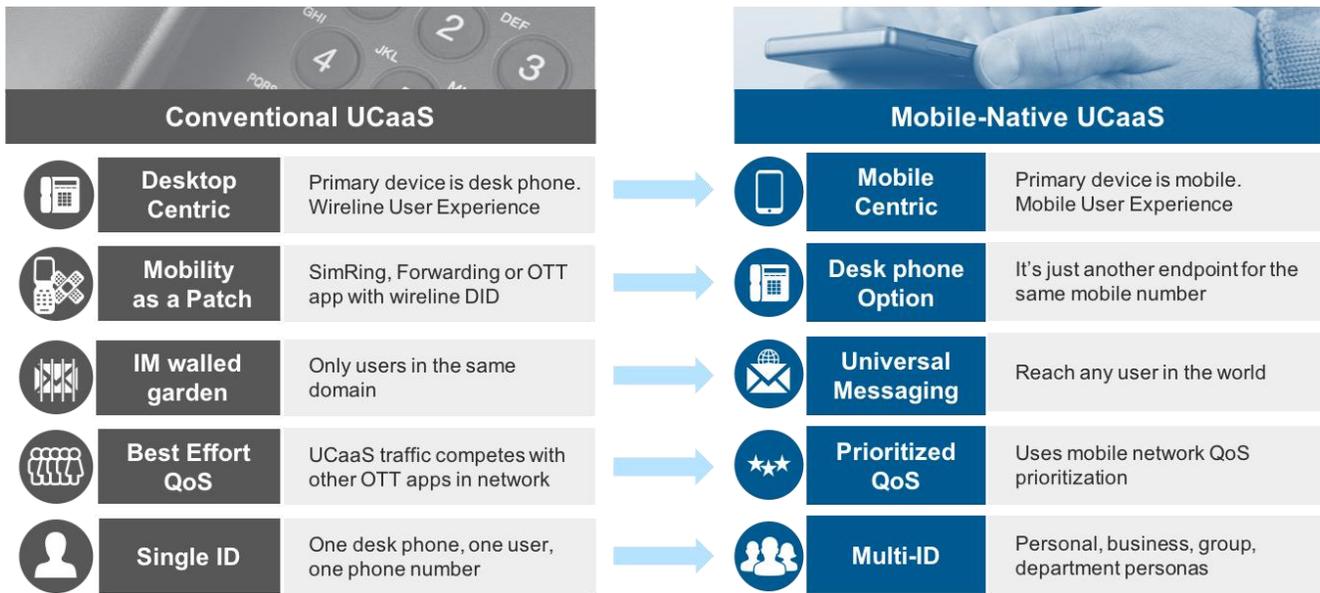


Figure 3 Conventional UCaaS vs. Mobile-native UCaaS

White-Label UCaaS: Minimal risk for SMB deployments

More agile both technologically speaking and in process terms, small businesses are typically very price-sensitive and highly reliant on employees using personal mobile phones for work purposes. Company functions vary tremendously, of course, but engagement in the service and trade industries represents a high percentage of these businesses. Maximum mobility, ease of use, and ease of management are primary considerations in these cases.

Here again MNOs, with their consumer and retail-based models, are ideally positioned to reach the SMB space with UCC solutions. In these cases, an MNO building a presence in the enterprise market would best be served by deploying a third-party, white-labeled UCaaS service from a managed cloud environment, which minimizes the upfront investment and risk and leverages the geographical availability of the UCaaS service provider.

In this scenario, the third party handles the UCC service functions behind the scenes: keeping the software components running and up to date, and continuously upgrading the platform with the latest features while also providing tier-3 support. An MNO can quickly bring this type of solution (often offered at a wholesale recurring price from the UCaaS vendor) to the market with its own brand, marketing, pricing, and value proposition at minimal risk. And it's all transparent to the end user.



Advantages of deploying a third-party UCaaS solution in an MNO environment

- CAPEX savings—there is no hardware to purchase or maintain.
- OPEX model—operator buys at wholesale and sells with a margin; expenses are reduced to marketing and the cost of sales.
- Flexibility and scalability—the model supports pay-as-you-grow, typically on a per-seat basis with a small number of feature bundles; there's no need to over-dimension or pay for unused capacity.
- Faster go-to-market—minimal network and capacity planning means faster approvals and network integrations; deployment timeframes are in weeks instead of months.
- More competitive—as new features are added by the UCaaS provider, they are quickly made available to end-user devices via application updates.
- Built-in disaster recovery and business continuity—managed UCaaS solutions are typically deployed in geographically redundant configurations that allow MNOs to continue operating the service in case of natural disasters or disruptions.

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How Mavenir enables the MNO with solutions for business mobility

Mavenir, with its carrier-grade, Mobile Business Communications and Collaboration offering, provides MNOs with solutions that allow them to extract the maximum value from their 4G network investments, while paving the way to 5G with sticky, revenue-generating mobile-native business communications.

Mavenir's solution is offered in a white-label UCaaS configuration hosted in Mavenir's cloud. Easily integrated into the mobile network environment, it is built, among other, upon Mavenir's award-winning Multi-ID and rich communication services (RCS) messaging platforms, which are already deployed in many Tier-1 operators around the world.



Figure 4 Mavenir's Mobile Business Communications and Collaboration benefits

Providing global voice, video, and messaging connectivity to any mobile number in the world and leveraging the QoS capabilities of the mobile network to prioritize its own traffic over other over-the-top applications (including Skype for Business, RingCentral, 8x8, BroadSoft, or even YouTube), Mavenir's solution provides a modern, relevant feature set from a single easy-to-use interface, including:

- Multiple identities (e.g., for separate personal and business personas or group numbers for departments)
- Universal messaging with a variety of group chat and rich media capabilities
- Screen and file sharing, as well as whiteboards
- Scheduled and ad-hoc meetings
- Comprehensive voice and video conferencing capabilities
- Powerful collaboration tools for calendaring, real-time messaging, tasks, and more
- Team options for creating topics and sharing
- Compatibility and communication continuity with cellular-WiFi handover as well as support for SIP desk phones.

Designed with a focus on enabling the deskless, first-line workers, Mavenir's Mobile Business Communications and Collaboration provides a unique value proposition for SMBs, while still being able to scale to accommodate the mobility needs of large enterprises.

It combines the advantages of a BYOD and UCC solution with none of the disadvantages. Since it is a service deployed and managed by the business, it allows it to retain control of the customer relationship. If an employee leaves, the business still owns the phone number and can easily assign it to another employee. It is also very cost-effective for the SMB segment, as no new CAPEX is required, only a simple monthly OPEX model.

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Mobile Business Communications and Collaboration also provides proper work-life balance for employees that use their own phone for the service. With features like Do Not Disturb, Call Forwarding, and Business Hours, employees can have the flexibility to be away from work without losing business continuity.



Figure 5 Mavenir's mobile-native user interface—a frictionless, consumer-like experience

Regardless of whether the Mobile Business Communications and Collaboration solution is deployed in the Mavenir-managed UCaaS cloud or as an MNO-owned UCC platform, powerful back-end management and security features are built in. Designed as a multi-tenant environment, an admin portal for each corporate instance provides a system dashboard and includes all the functionality needed for establishing roles and permissions, setting up the company, managing users and lines, and monitoring system health.

It's an approach to UCC with no walled gardens, no switching between work and personal phones, and no flipping between applications. It's all there, all mobile-native, designed for a quick and easy start-up with a gentle learning curve. Communications and collaboration with anyone, anywhere, on any device and any network, are now available with Mavenir's ground-breaking UCC offering.

And the revenue opportunities don't stop with unified communications. Mavenir's mobile-native UCaaS solution integrates with Mavenir's Messaging-as-a-Platform (MaaS) cloud to provide application-to-person (A2P) and person-to-application (P2A) revenue flows with access to brands and aggregators, chatbots, anti-spam, and other messaging tools that allow businesses to provide a better user experience to their consumers.

Finally, despite being mobile focused, Mavenir's solution can still accommodate office workers and common area devices by allowing the use of IP phones from leading brands (such as Polycom and Yealink), as well as full collaboration desktop clients for Windows and macOS.

Available White-labeled from Mavenir's cloud

UCaaS provides TCO advantages when in the initial phases of service-offering development. With better speed to market and a simplified service offering, MNOs can quickly generate new revenue streams with low risk and effort.

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Conclusion

The market is ready for mobile network operators to provide carrier-grade, mobile-native UCC services to underserved business customers demanding for employee mobility, particularly in the SMB space. MNOs have many key advantages in this market, including:

-  They already have the business's trust
-  They own strong relationships with both mobile users and businesses
-  They own the mobile network
-  They have access to the smartphone's native dialer
-  They can provide a consumer-like experience
-  They can deliver SIP trunking solutions and mobile-native support to the large enterprise.
-  They already have most of the components required (VoLTE, VoWiFi, RCS, etc.) to provide a mobile-native experiences with outstanding quality of service.

Mavenir's [Mobile Business Communications and Collaboration](#) solution provides additional advantages for MNOs that conventional, enterprise-grade UCC and UCaaS solutions simply can't match. It's an unprecedented time to disrupt the business mobility market and tap into the SMB segment, and operators are uniquely positioned to take advantage of it. Don't let the window of opportunity shut on generating new revenues, increasing customer loyalty, and reducing churn.

Empower your customers to do business anywhere with mobile-native unified communications and collaboration.

For more information visit Mavenir.com

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