

Cloud-native, AI-powered communications platforms are revolutionizing business agility, security, and collaboration — empowering organizations to modernize, innovate, and deliver exceptional employee and customer experiences in a dynamic digital era.

The Communications Services Platform as a Catalyst for Secure, Flexible, and AI-Enabled Digital Transformation

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Introduction

The communications landscape across businesses of all sizes is undergoing a major transformation as organizations accelerate their shift to cloud-native, AI-powered platforms. The need for greater agility, operational efficiency, and the ability to deliver new and improved employee and customer experiences is driving this shift. Modern communications services platforms leverage an extensive global fiber network and deep expertise in communications services, putting these solutions at the forefront of this evolution. By integrating communications capabilities into a single, secure, and scalable platform, cloud-native communications platforms are purpose-built for businesses that face changing opportunities and challenges in the digital and AI-driven world of communications.

The imperative for playful communications solution modernization

Businesses today face mounting pressures to modernize their communications infrastructure. Outdated, on-premises systems present significant challenges, including resource-intensive maintenance, escalating costs, and limited ability to support hybrid work and digital engagement. Organizations that rely on legacy voice systems often experience difficulties with migration, frequent repair issues, and rising local voice charges. The growing complexity of integrating disparate platforms and the need to address evolving security and compliance risks compound these challenges.

The rapid adoption of AI and data-rich applications amplifies the urgency to modernize. Businesses are seeking unified platforms that seamlessly combine voice, video, messaging, and contact center capabilities, enabling real-time collaboration and customer engagement. The integration of AI-powered analytics, omnichannel contact center solutions, and secure, scalable cloud infrastructure is now a baseline expectation for organizations aiming to stay competitive and responsive in a fast-changing market.

AT A GLANCE

KEY TAKEAWAYS

- Cloud-native, AI-powered platforms boost efficiency — 75% of enterprises plan adoption.
- Network ownership and managed services deliver performance, security, and flexibility.
- Security, agility, and AI connectivity are top priorities — 60% cite network security challenges.

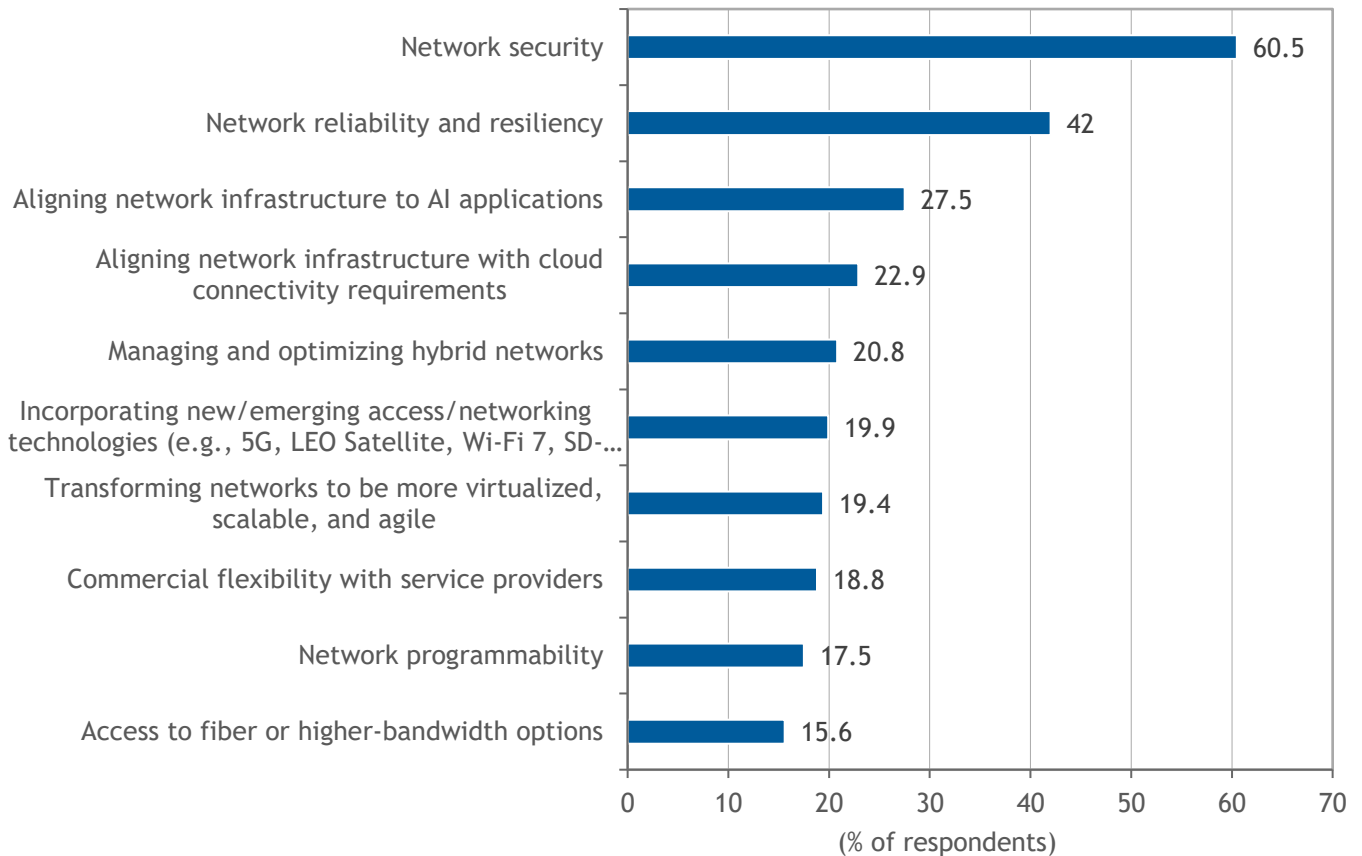
A communications services platform that a network provider owns and operates can deliver advantages in performance, security, and operational agility. IDC research indicates that as organizations modernize communications environments, the integration of AI-enhanced platforms with underlying network infrastructure delivers measurable improvements in reliability, responsiveness, and user experience. Unified platforms that combine communications and contact center capabilities simplify vendor management, reduce complexity, and foster consistent collaboration across distributed teams. The following are noted challenges among businesses today:

- » Embedding AI capabilities at the network level — such as predictive analytics, real-time transcription, and sentiment analysis — extends automation and insight across the enterprise, driving productivity gains and enhanced customer engagement.
- » Cloud-native communications services platforms integrated at the network layer bring flexibility and scalability to businesses, challenges that IT leadership continues to contend with in their organizations, all while maintaining compliance with data protection and security standards.
- » Managed services from network-based platform providers and enterprises can accelerate migration, mitigate risk, and refocus internal IT resources on innovation and business transformation.

IDC views the alignment of communications platforms with network ownership as a critical enabler of secure, intelligent, and adaptive digital engagement strategies that will define competitiveness for businesses of all sizes in the AI-driven economy. Unsurprisingly, businesses see challenges with these aspects of their communications today, as Figure 1 depicts, leading businesses to seek to modernize their communications approaches.

Figure 1

Q From a networking perspective, what are the top 3 connectivity-related challenges your organization currently faces?



Note: North American business respondents from companies with 250+ employees.

Source: IDC's *Future Enterprise Connectivity Infrastructure and Services Survey*, August 2025

Unified, cloud-native communications services platform approach: Reducing complexity and enabling agility

Network ownership enables performance control and differentiation

Owning the network provides a communications services platform with direct control over how to manage, prioritize, and secure traffic. This end-to-end visibility allows the platform to guarantee service quality, optimize latency, and offer differentiated performance levels tailored to diverse customer needs. Unlike providers that depend on third-party networks, network owners can align infrastructure performance with application demands, creating a superior and more predictable user experience across connectivity, cloud, and edge services.

Infrastructure ownership strengthens economics and strategic flexibility

Owning the underlying infrastructure allows a platform provider to capture more of the value chain while reducing long-term dependency on wholesale or leased capacity. This control improves cost efficiency, stabilizes margins, and supports

scalable, sustainable service delivery. It also offers greater flexibility to adapt network design, capacity, and technology investments to meet evolving market requirements. This can lead to faster innovation cycles and smoother integration of new capabilities, such as automation, AI, and programmable networking, all of which are must-have abilities for businesses operating in today's competitive environment.

Network control presents trust, security, and innovation opportunities

As cyberthreats become more sophisticated and regulatory requirements tighten, security and compliance are top priorities for organizations modernizing their communications infrastructure. Legacy voice systems often lack the advanced security features needed to defend against today's threats, exposing organizations to financial loss and reputational harm. Platforms designed with robust security measures and adherence to industry standards, safeguarding sensitive communications and data, can benefit the organizations that use them. The provider's control over its network infrastructure enables end-to-end security, advanced threat detection, and compliance with data sovereignty laws. This comprehensive approach ensures operational continuity, reduces downtime, and supports business growth in a rapidly evolving digital landscape.

Network ownership enhances a platform's ability to safeguard data, manage compliance, and deliver trusted services. It enables deep visibility for threat detection, secure handling of sensitive traffic, and adherence to regional data governance standards. Beyond risk management, owning the network opens pathways for innovation: exposing APIs, embedding intelligence at the edge, and collaborating with partners to co-create digital services. This combination of control, trust, and ecosystem enablement turns network ownership into a foundation for long-term differentiation and value creation.

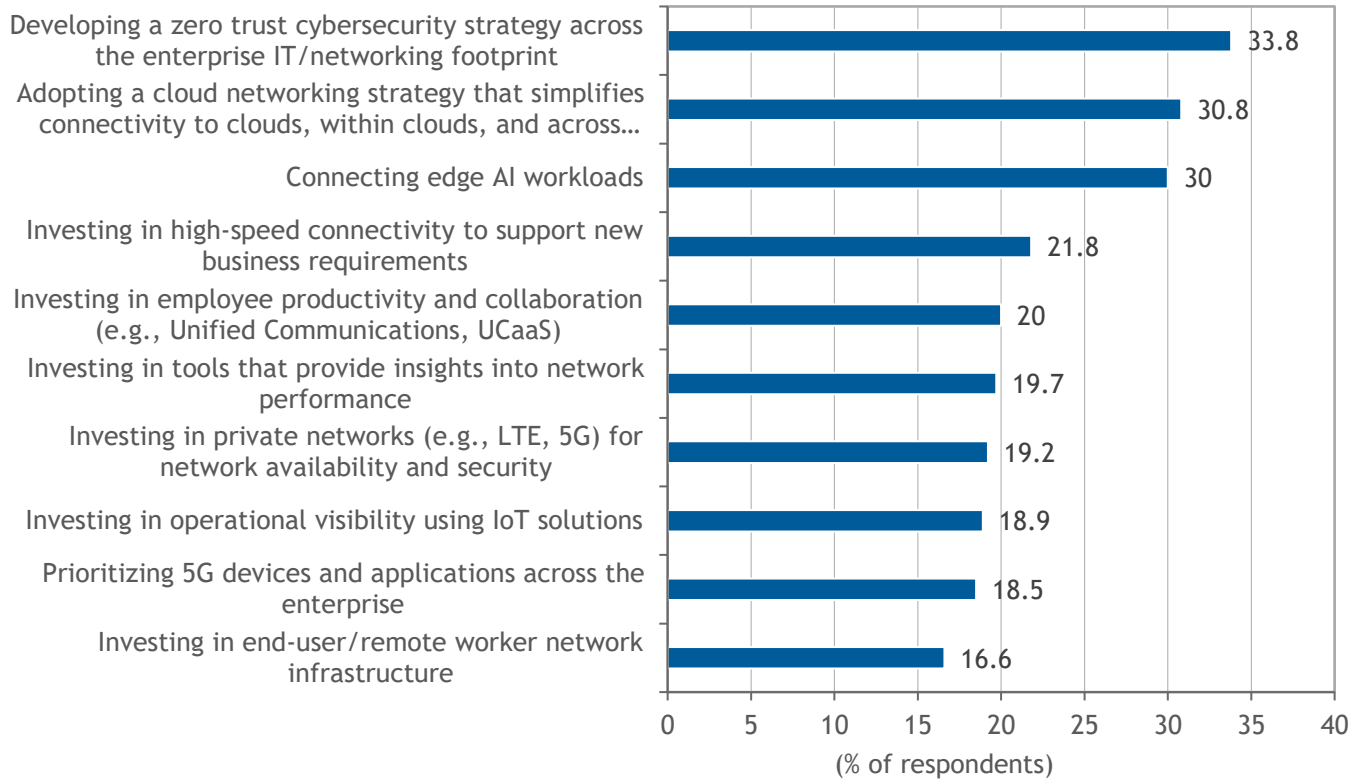
The role of AI: Transforming communications and collaboration

AI is rapidly becoming the engine of innovation in enterprise communications, delivering tangible benefits for both employees and customers. In the contact center, AI-driven features such as real-time transcription, predictive routing, and sentiment analysis are streamlining workflows, enabling agents to focus on high-value interactions and providing supervisors with actionable insights to improve service quality. The emergence of agentic AI — capable of reasoning, memory, and autonomous task orchestration — promises to further automate complex workflows, reduce manual data entry, and drive better business outcomes.

For collaboration and productivity, AI-powered tools such as smart meeting summaries, real-time transcription, and predictive analytics are enhancing user experiences and enabling more efficient decision-making. The integration of AI at the network level further optimizes operational efficiency, ensuring that organizations can fully leverage the potential of modern communications platforms. Yet, only 26% of businesses in North America (250+ employees) today would describe their communications strategy as market leading and embracing the cloud, AI, analytics, and automation to provide an optimal experience for employees, according to IDC's Future Enterprise Connectivity Infrastructure and Services Survey (August 2025).

Figure 2 lists businesses' top 3 strategic connectivity priorities to improve business outcomes over the next 12 months.

Figure 2

Businesses' top 3 strategic connectivity priorities to improve business outcomes over the next 12 months

Notes: Includes North American business respondents from companies with 250+ employees.

Source: IDC's Future Enterprise Connectivity Infrastructure and Services Survey, August 2025

Considering Lumen's connectivity services platform

Lumen delivers communications services that help organizations connect, collaborate, and share information efficiently. Lumen's solutions support seamless voice, messaging, and unified communications, enabling teams to work together across locations and devices. With a focus on reliability and security, Lumen designed its communications services to meet the needs of modern businesses and support their operational goals. Specifically, Lumen's cloud communications portfolio addresses the full spectrum of enterprise needs, supporting immediate operational requirements and long-term strategic goals. Key offerings include:

- » **Lumen Cloud Voice:** The flagship product for cloud communications, delivering reliable, scalable voice services that support hybrid work and multilocation operations
- » **Lumen Cloud SIP:** A flexible SIP trunking solution that facilitates migration from legacy systems and supports hybrid on-premises and cloud environments

- » **Lumen Contact Center (CCaaS):** AI-powered tools that enhance agent productivity, customer satisfaction, and operational efficiency through advanced analytics and automation, including available options such as integrated Genesys and Talkdesk
- » **Lumen Unified Communications and Collaboration (UCaaS):** Integrated messaging, meetings, and collaboration capabilities that enable seamless teamwork and information sharing, including available options such as integrated Microsoft, Zoom, and Cisco solutions
- » **Lumen CPaaS:** Developer-friendly APIs that allow organizations to embed communications into business workflows, driving innovation and agility

By integrating these solutions into a unified platform, Lumen enables organizations to streamline connectivity and collaboration, adapt to the demands of the AI-driven economy, and unlock new levels of operational effectiveness. Furthermore, Lumen's platform has robust security measures and adheres to industry standards, safeguarding sensitive communications and data. Lumen's control over its network infrastructure enables end-to-end security, advanced threat detection, and support for compliance with data sovereignty laws. This comprehensive approach promotes operational continuity, helps reduce downtime, and supports business growth in a rapidly evolving digital landscape.

Challenges

Because businesses are overwhelmed with the pace and breadth of communications technology innovations, Lumen will need to do a good job communicating the ease of modernizing with a solution partner such as itself, particularly by emphasizing its phased, supportive approach that it can tailor to the business's needs.

Conclusion

IDC believes that the communications services platform is a clear enabler of secure, flexible, and AI-powered digital transformation that businesses of all sizes can benefit from. As organizations accelerate modernization, network ownership that includes the convergence of cloud-native communications and embedded AI can deliver measurable improvements in operational resilience, security, and user experience. Unified platforms that integrate voice, video, messaging, and contact center capabilities are reducing complexity and empowering organizations to respond dynamically to evolving market demands. Lumen's strategic investments in programmable, secure infrastructure and managed services position it well to address these imperatives. IDC expects that vendors able to deliver on these requirements will be well placed for sustained market leadership and growth in the AI-driven economy, and if Lumen can address the challenges this paper describes, the company has a significant opportunity for success.

Unified platforms that integrate voice, video, messaging, and contact center capabilities are reducing complexity and empowering organizations to respond dynamically to evolving market demands.

About the analyst



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Denise Lund's research focuses on advanced communications services, including VoIP and unified communications as a service (UCaaS). In this position, she provides coverage of voice communications, including fixed and legacy voice (local, long distance, and PRI ISDN) and IP voice (hosted VOIP with/without UC, SIP trunking, IP phone), as well as emerging migration and usage trends occurring in the voice market.

MESSAGE FROM THE SPONSOR

Lumen delivers communications services designed for the future of work—secure, reliable, and ready for AI-driven innovation. Our solutions enable seamless voice, messaging, and unified communications, helping teams connect and collaborate across locations and devices. By integrating Lumen Cloud Communications services that support automation and intelligent workflows, Lumen empowers organizations to enhance productivity and prepare for emerging technologies.

Discover how our AI-ready communications services can help your teams connect, collaborate, and succeed anywhere.

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