

VOIP Services

AN IDC CONTINUOUS INTELLIGENCE SERVICE

Voice over IP (VOIP) is the driving force for the next generation of enterprise and consumer communications solutions. The advantages of IP-based real-time communications services are too important to ignore for any service provider competing in the user-centric multimedia communications market. IDC's *VOIP Services* research analyzes the worldwide adoption of VOIP services in the consumer, small and medium-sized business, large enterprise, and wholesale carrier sectors. Key VOIP services tracked include, but are not limited to, consumer broadband VOIP, business-hosted IP voice services, and VOIP over IP VPN for the enterprise. In addition to tracking voice, this service also analyzes applications and services delivered over IP (SOIP).

Markets Covered

- VOIP over WiFi and WiMAX services for consumers and enterprises
- Hosted IP voice services, including IP Centrex managed and outsourced IP PBXs
- Managed VOIP services integrated with enterprise VPN
- Consumer VOIP over broadband
- IP video and multimedia services
- Basic and enhanced VOIP features

Subjects Analyzed

Throughout the year, this service will address the following topics:

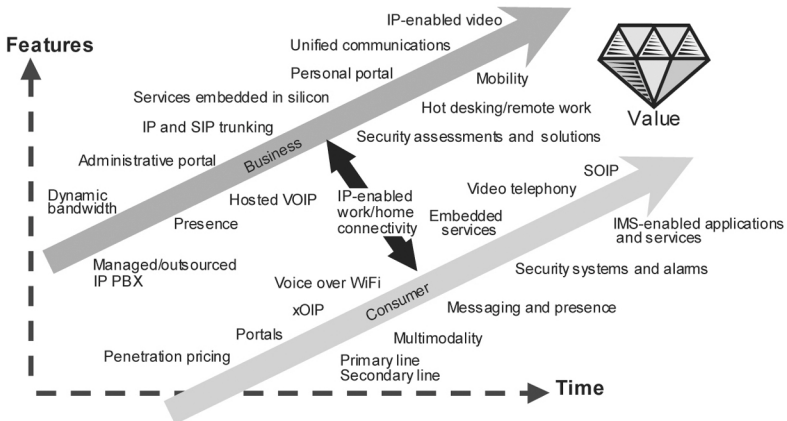
- SOIP and convergence
- Regulatory overview and compliance such as e911 and CALEA
- Peering arrangements and extranet community on-net opportunities
- IP and SIP trunking services
- Consumer applications such as presence and IP messaging
- VOIP implications of emerging access facilities such as SDSL, Ethernet, and wireless
- ENUM and direct voice peering arrangements as the evolution of the PSTN
- Service provider opportunities to host IP applications such as presence-, collaboration-, and location-based services

Key Questions Answered

Our research addresses the following issues that are critical to your success:

1. How will VOIP and SOIP affect mobility?
2. Can IP Centrex services win share from IP PBX vendors?
3. Will a bring-your-own access model dominate consumer VOIP, or will local access facility owners, RBOCs, and cable MSOs leverage their vertical integration?
4. What is the customer value of presence- and IMS-enabled applications and features?
5. Can business VOIP pricing models evolve from per seat to per port to enterprisewide aggregated channels?
6. Will desktop applications such as Microsoft Exchange take control of the VOIP user interface?
7. What is the business case for VOIP over WiFi?

VOIP Product Offerings and Features



Source: IDC

Companies Analyzed

IDC's *VOIP Services* research examines how carriers and service providers are positioning VOIP-based products as market demand begins to catch fire. This service reviews the strategies, market positioning, and future direction of carriers, including:

3Com, 8x8, Accessline, Alcatel-Lucent, Angel.com, AOL, AT&T, Avaya, Bridgeport, BroadSoft, Cablevision, CallTower, Cbeyond, Charter Communications, Cisco, Comcast, Covad, Cox Communications, Digium Asterisk, EarthLink, Fonality, fring, Global Crossing, Global IP Solutions, Google, IBM, Infonet, Intel, iotum, IP Unity, Jajah, Level 3, Lucent, M5 Communications, Marvel, Meru, Microsoft, MINO Wireless, Motorola, NEC, Net2Phone, Neustar, New Global Telecom, Nokia, Nortel, Nuvio, PacWest, Palm, Peerio, Plantronics, Polycom, Primus, Qwest, RIM, RingCentral, Salesforce.com, Siemens, SightSpeed, Skype, Sonus, Speakeasy, Sprint, SS8, Starvox, Sylantro, Talkplus, Talkster, Tekelec, Time Warner Cable, VeriSign, Verizon, Vonage, XO Communications, and Yahoo!.

Research Agenda

Throughout the year, this service will offer insight into the latest trends impacting the market. Potential studies include:

Consumer VOIP Forecast and Analysis
In this study, IDC forecasts the consumer broadband VOIP market, including both DSL and cable modem service. The document provides a forecast of subscribers by access and revenue, including monthly revenue per user.

Wholesale VOIP Forecast and Analysis
This study examines the rapidly developing market for wholesale MOUs and private-label applications offered to carriers.

Enterprise Hosted Voice Forecast and Analysis
This study analyzes and quantifies the IP Centrex market by revenue and number of end users. In addition, the forecast includes breakouts of access and long distance as well as hosted voice. Analysis includes IP-based managed services for the SME and large enterprise markets. Feature and cost trade-offs between CPE-based solutions and hosted services are also addressed.

A Complete Intelligence Solution

IDC offers a complete market intelligence solution customized to meet your business requirements. The array of products and services available to you includes:

- The opportunity to have your specific questions answered through personal interaction with industry experts who cover the topics and markets in your service
- Around-the-clock access to our market intelligence on idc.com, IDC's personalized Web experience
- A view of the market's future with 12 months of continuous intelligence about its direction and the reasons behind it, along with actionable advice for taking advantage of existing and emerging opportunities
- Special client discount pricing on purchases of research from other services
- Complimentary admission to IDC's annual Directions conference, where you'll hear our latest forecasts and network with IDC analysts and other industry professionals
- Complimentary invitations to monthly executive telebriefings, interactive forums designed to provide you with insights about research and strategies directly from IDC analysts

To find out how our flexible packaging options can meet your specific business needs, please contact your IDC sales executive.

IDC's Investment Philosophy

As a privately held company, IDC believes that our customers are our primary constituency. A large percentage of every revenue dollar is reinvested back into our products, including more analysts, more geographic coverage, and extensive primary research.

Our steady growth over the past 10 years reflects our commitment to investing in our customers.

FOR MORE INFORMATION, VISIT US AT WWW.IDC.COM.

IDC
Analyze the Future

IDC is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. More than 900 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 90 countries worldwide. For more than 43 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. You can learn more about IDC by visiting www.idc.com.

IDC Global Headquarters, 5 Speen Street, Framingham, MA 01701, P.508.872.8200 F.508.935.4015.

For a complete list of IDC's worldwide offices, visit www.idc.com/offices

IDC_P8648_0507