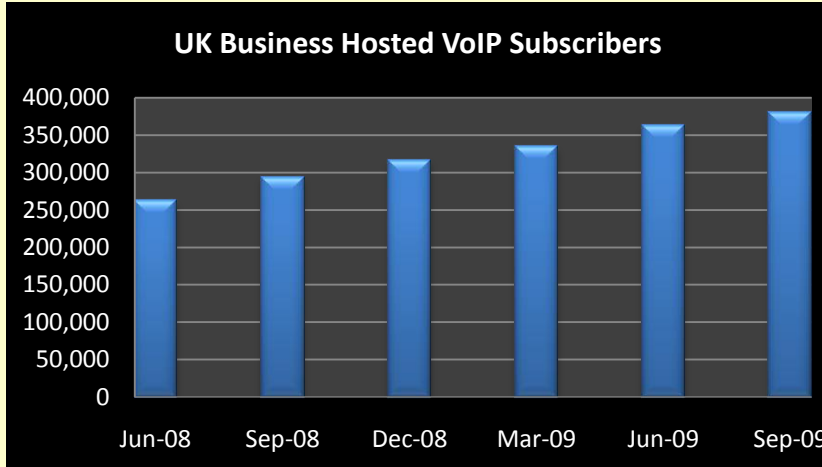




Quarterly VoIP Research

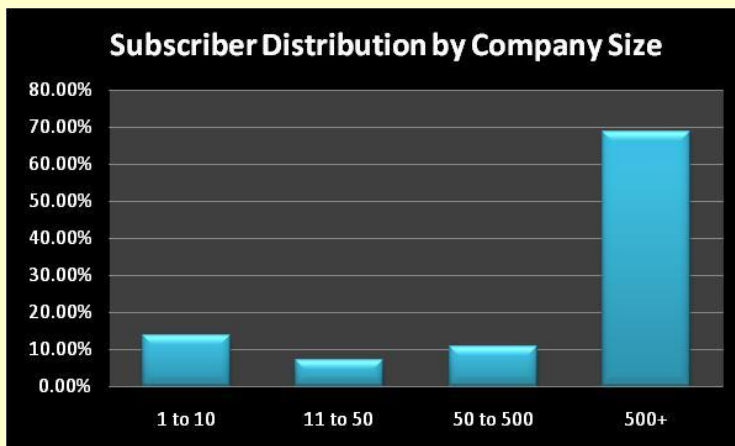


“Hosted VoIP users reaches 380402 growing 5% quarter on quarter”

This quarter we continued to see growth in the hosted market, although in fact it is a mixed story amongst providers. We are seeing the larger more focussed providers growing at a lot faster rates than the combined market, but on the other hand we are finding some of the smaller providers either showing flat growth or indeed pulling out of the market.

This consolidation of providers is destined to continue over the coming months, as we will see some of the smaller bases consumed by the larger providers.

Also this quarter we were very interested by Vodafone’s move into the hosted market, with the new Vodafone One Net offering which appears to be a FMC based solution.



Also this quarter we asked providers to let us know how their current bases of subscribers were distributed by company size. Although the above chart shows the majority of users are in the 500+ companies, this is highly skewed by a handful of very large contracts. Interestingly since we last looked at the distribution of users there has been significant success in selling to the small 1 -10 companies.

IP Trunking

This quarter we have started publishing a quarterly view of the IP trunking market, initially we were looking at this in terms of “SIP” trunks but during our discussion with providers it is clear there is some debate about which services are using SIP versus IAX, H323 etc. Therefore the figures we are publishing should probably be best seen as IP trunks rather than specifically SIP trunks, though in fact the majority of this number is likely to be SIP. We define a trunk as “the technical capability to support a single voice call, regardless of codec”.

The IP trunks figure as measured at the end of Augusts was: 70,040

We are seeing strong growth in the SIP trunking market with a number of new entrant providers. These providers are often focussing on an ISDN replacement proposition which seems to be gaining traction.

illum Update

illum has updated both its SIP trunking market report and its hosted forecast to reflect the current information. Both are for sale on our website at <http://www.illumconsulting.co.uk/research.shtml>.

Also illum continues to offer customers; market research channel and product strategy advice where needed. If you have any question about the figures or illumes activities please contact Matt Townend on the below.

Illume would like to thank the service providers for their ongoing support that enables us to provide the market with access to credible market figures.

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