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Top 10 VoIP Leaders - 2007

December 10, 2007

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Our ten VoIP leaders each won their position because of their core strength in specific categories of the IP market place. Other companies may be bigger, some better known, but the criteria we looked for were companies which in their niche had clear product strength and competitiveness. The order is random and of no relevance and as we prepared the list we found it was companies with strong vision, a sharp focus on what was needed and an ability to deliver a product or solution to meet a clear market demand that were emerging as VoIP champions.

In our opinion they deserve to succeed, but to be clear, what we sought were not necessarily companies with the best business plan, deepest pockets, or highest stock prices, but firms that had established leadership through their successful execution and operations.

The range of companies was impressive with some hard core technology providers mixed with service providers and web 2.0 innovators. In one case, the open source platform, Asterisk, leadership comes more from an attitude and approach than having the most complete feature set.

As we surveyed the VoIP landscape several trends became obvious: at the market level there is a shift in activity from service provider to enterprise. The change reflects the maturing of the consumer VoIP market and although it is too early to say VoIP has been commoditized we do seem to have reached a point where basic residential and business VoIP has arrived. The shift to the enterprise also says that businesses having embraced the basic voice part of IP technology are now ready to create real time infrastructures and expand their IP domain across the majority of their internal services.

A related trend is the transition from VoIP to unified communications. Microsoft's evangelism of UC and determination to create an ecosystem was almost certainly the green light for enterprises to start was promises to be a very exciting chapter in the IP evolution. Establishing the ROI for this next investment in business productivity is a challenge-- especially if the US economy goes into decline-- but the integrating of business process and communications technology holds out the opportunity for

companies to radically cut their execution cycles.

Clearly an elephant in the room is the looming bandwidth crunch with video threatening to ruin the party for everyone. In four years time video is predicted to consume three times today's entire internet traffic. The viability of VoIP and related services is dependent on a workable solution emerging to ensure some sort of sensible rationing of bandwidth.

At the meta level Google and its ecosystem of open source developers challenge to proprietary systems and business models is clearly shaping the IP landscape, most notably in the mobility and wireless sectors, but also around the highly innovative social network space.

And finally, back on earth, the sharp reality that VoIP systems remain quite vulnerable to hacking is a frank reminder that VoIP and IP services in general, remain a work in progress. -Tom Burton

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