The Recombinant Telephony Ecosystem: Voice Mashups and the Telco API

The idea behind Recombinant Telephony is relatively simple: splice together the basic materials of today's communication technologies with new software elements to introduce new services that support customer requirements. A fast-growing community of technology providers, application developers and service delivery specialists are helping fuel spending on software, services and "appliances" that fulfill on the Internet's promise to support a better user experience for commerce, communication and collaboration.

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Key Findings:

The concept of "Recombinant Telephony" has captured the imagination of a fast-growing community of technology providers, application developers and service delivery specialists. With the global economy poised to come out of its deep freeze, Opus Research expects to see an uptick in spending on software, services and "appliances" that fulfill on the Internet's promise to support a better user experience for commerce, communications and collaboration:

- **The economic downturn fosters disruption** – Enterprises, along with their customers and trading partners have to "do more with less" as they design future communications and computing infrastructures.

- **Amidst the disruption are the roots of a $44 billion opportunity (by 2014)** – There are several areas of opportunity for application developers and integrators that extend the power of the Internet to support communications, collaboration and commerce.

- **Solutions result from re-use and re-combination** – In this economy, frugality is the mother of invention; companies extend the life of existing information and computing assets by transforming them into "services" offered over the Web.

- **Opportunities abound for application developers** – A new generation of highly creative application developers use high-level programming languages and visual tools to build "mashups" that include voice, email, instant messaging and Web-based interaction as service delivery mechanisms across channels and modalities.

- **A new take on the ecosystem is provided** – In the new value chain, Amazon, Google, Microsoft, Salesforce and even Facebook are providers of "cloud-based resources" with potential to compete or partner with incumbent communications carriers.

- **Commoditization is the biggest challenge** – Users expect services to be both free and abundant; the result is accelerated commoditization of the service delivery network.

- **Providing higher quality user experience is key to proving value** – Revenues and profits will result from proving value to end-users, retaining them and delivering services that they will gladly pay for.

- **Unless the end users are winners, all ecosystem members will be losers** – The network is fragile right now. Significant integration must take place in order to provide the services that "delight" end-users and customers.

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