# ITSPA

**Internet Telephony Services Providers' Association**

# ITSPA Annual Report

# 2019-2020

## Presented to ITSPA Members AGM

Wednesday, 25th November 2020
Zoom

**Internet Telephony Services Providers' Association**

# Contents:

# ITSPA

**Internet Telephony Services Providers' Association**

## Chairman's Report

Welcome to the 2020 ITSPA AGM. This is our fifteenth AGM, and our first ever virtual one!

Much of ITSPA's work since the previous AGM in June 2019 has been dominated, inevitably, by the COVID-19 crisis. The impact on ITSPA members was felt almost immediately, particularly for those focused on certain sectors such as travel and hospitality.

Nevertheless, ITSPA members and indeed the whole industry can be proud of how it responded to the immediate challenges posed by the crisis and their efforts to help customers adapt to the "new normal" and maintain their operations remotely. Additionally, there have been numerous examples of the sector showing its true colours with voluntary support to organisations who are helping in the pandemic response.

ITSPA itself has managed to shift to this new environment, continuing to have meetings with key stakeholders in Ofcom and Parliament via video calls, and adjusting events such as the annual Summer Forum to a series of webinars, which saw excellent content and discussions between participants, and converting the 2020 ITSPA Awards to a virtual ceremony. An added benefit of turning events virtual has been enabling members based a long distance from London to attend more easily.

Throughout the crisis, we have continued our regular discussions with both Ofcom and Government. These discussions have not only been focused on the impact of COVID-19 itself on our members but also on the wider regulatory challenges that the sector is facing at this time.

Our **Industry Developments Group** has continued to see major lobbying wins since the previous AGM, including just a few months ago when we forced Ofcom to publish new proposals for the definition of small enterprise and not-for-profit organisations in their implementation plans for the European Electronic Communications Code. Under the previous proposals, all not-for profits and business of up to 50 employees would have received consumer-like protections and we are delighted that our hard work paid off.

A further major focus on a lobbying and regulatory front has been the shift to All IP and the **switch off of the PSTN** which is scheduled for 2025. We have continued to engage with Government, Ofcom and Parliamentarians – along side the rest of the industry – on this fundamental change. Much of our work with Parliamentarians has been to raise awareness of the shift and highlight the need for a nationwide communications plan to ensure that customers (both residential and business) are aware of the plans. Work is really ramping up in this area and there remain a number of unanswered questions which need to be resolved in order to

ensure the changes are managed appropriately and the competitive nature of the market is maintained.

Indeed, our work on number portability reform is also escalating with a revised strategy following the conclusion of Ofcom's blockchain proof of concept work. Since the project found that blockchain is not a suitable solution for number portability, it is essential that ITSPA and the entire industry continue to push for reform and ensure that the issue does not slip off Ofcom's agenda.

Our Operations Group has also had a busy period since the last AGM, with numerous initiatives, webinars and guidance documents being published. Particular highlights have included: the publication of a recommendations paper on network resilience; continued collaboration with UM Labs on the SNITCH initiative; and a webinar on STIR and Shaken.

In terms of events, despite the pandemic restrictions these have continued to go from strength to strength. The Summer Forum webinar series, which included sessions on the state of the market, IP migration, regulatory hot topics and COVID-19, was a particular success. Similarly the 2020 ITSPA Awards were very well attended and more competitive than ever.

I would like to use this opportunity to thank the ITSPA Council and the wider membership for their work over this period. Particular thanks must go to the chairs of our three working groups: Tracey Wright (Chair of the Industry Developments Group), David Cargill (Chair of the Operations Group) and Trefor Davies (Chair of the Promotions Group).

Finally, in what have been incredibly difficult circumstances due to the pandemic I think we can all be very proud of ITSPA's continued work. The nature of the recent challenges have shown just how important effective trade associations are and everyone at ITSPA looks forward to continuing to provide this support to the industry as we await the challenges that lie ahead.

Best regards,

Eli Katz, ITSPA Chair (XConnect)

**Internet Telephony Services Providers' Association**

**Industry Developments Group**

The Industry Developments Group, Chaired by Tracey Wright (Magrathea), has led much of ITSPA's work in response to COVID-19 and has also focussed on a number of regulatory issues, consultations and policy developments. A full list of consultation responses drafted by the group can be found towards the end of this document. Major highlights have included:

### COVID-19

As the pandemic broke out, the Industry Developments Group led efforts both to update and brief members on developments and represent members' concerns and priorities to Government and Ofcom. A COVID-19 information hub was set up on the website and regular member calls held to update on Government support initiatives and industry-specific developments.

### IP Migration

The Group has led ITSPA's extensive work on this issue as the switch off of the PSTN in 2025 approaches. Much of the work has focused on the need for a nationwide centrally-funded communications campaign to communicate the changes to customers (both of a residential and business nature). Currently, Ofcom continues to state that it is for individual companies to communicate the changes to their customers themselves. This position is being repeated by Government and ITSPA continues to communicate that this suggestion is completely inappropriate. From initial meetings with Parliamentarians, including the Shadow Digital Minister, it has become clear that these concerns really resonate and support from MPs and Peers is being gained.

ITSPA is represented on numerous industry working groups on the transition to All IP and has continued to report back to members on developments. The coming year promises to be even busier in this area and the Group will lead further efforts to educate members. Two guidance documents have been published for members on the state of play and upcoming changes, and further documents have been planned.

### European Electronic Communications Code

The Group experienced a major lobbying success in the summer of 2020 when Ofcom published revised definitions of small and not-for-profit as part of their European Electronic Communications Code (EECC) implementation proposals. Under their previous proposals all not-for profits and business of up to 50 employees would have received consumer-like protections, however, following an intense and targeted lobbying campaign by ITSPA and other parts of industry, they have published revised proposals which do not extend protections in such an inappropriate way.

## Operations Group

### Recommendations for Resilience

The Operations Group published a "Recommendations for ITSP Resilience" guidance document. The document set out a series of measures that ITSPs should take to ensure that the resilience of their network and systems is adequate. The paper is intended to help members comply with legal obligations and deploy technical mechanisms to produce a secure network.

### SNITCH agreement with UM Labs

At the end of 2019, ITSPA and UM Labs completed an agreement ensuring the continued development of SNITCH. To mark this partnership, UM Labs ran a webinar presentation in January 2020 to show how SNITCH could be used to control fraudulent calls.

### Ofcom's blockchain number portability project

Throughout the year ITSPA has engaged with Ofcom and the NICC about the blockchain proof of concept project as a solution to number portability, including testing the blockchain and providing feedback to the membership. Now that Ofcom has formally confirmed that blockchain will not be a suitable solution, ITPSA is engaging more heavily with Ofcom on next steps and ensuring that a solution to the ongoing porting problems is found.

### STIR and Shaken

With STIR and Shaken being implemented in the US, ITSPA organised a webinar of experts to provide a briefing on the subject. The webinar covered explanations about what it is, why it is being deployed, the challenges and what has been implemented in the US so far as well as giving a summary about the progress within the NICC on this topic.

### Comms Data Training Session

ITSPA, in partnership with the National Communications Data Service, hosted a webinar to clarify and remind our members on their requirements to support law enforcement agencies in providing communications data.

## Promotions Group

### ITSPA Events

ITSPA's events programme has continued to develop since the previous AGM, despite the setback of being unable to host face-to-face events. A list of all the events we have held since the previous AGM can be found in the Secretariat Report. Due to the Coronavirus restrictions, all events after March 2020 have taken place online. Topics discussed included SNITCH, IP migration, number portability, STIR and Shaken and the impact of COVID on the industry.

ITSPA was delighted to again be present at the Cavell Group Cloud Comms Summit shortly before the UK went into the first national lockdown.

# ITSPA

**Internet Telephony Services Providers' Association**

The 2020 ITSPA Awards, the twelfth edition of this event, again proved to be a highlight of the events calendar. Whilst it was a shame that we were unable to hold the event in our usual fashion, we are happy to have been able to bring the industry together virtually to recognise outstanding performances over the year.

### Press and Social Media

Having joined Twitter in March 2015, @ITSPA_Tweets now has 644 followers, growing by over 100 in the past year, and the ITSPA LinkedIn page, which was created in 2019, has grown to 75 members.

ITSPA has seen good press coverage over the past twelve months, having a monthly piece in Comms Business on a range of issues – including getting Ofcom to rethink their implementation plans for the European Electronic Communications Code, the future of interconnection, and the challenges facing the sector during COVID-19. The 2020 ITSPA Awards also received extensive coverage. Coverage has been received across the trade press including in: Comms Dealer, Comms Business, ISP Review, Telecoms Reseller, Lexology and others.

### Ombudsman Services

Since late 2015 ITSPA members (with a turnover of under £20 million) have been entitled to free membership of the Alternative Dispute Resolution scheme Ombudsman Services (OS) as a benefit of ITSPA membership. It is a regulatory requirement that communications service providers are members of either OS or the other Ofcom approved ADR scheme (CISAS).

Members should be aware that if their company turnover is over £20 million they must have their own separate arrangement with either Ombudsman Services or CISAS.

Since the previous AGM, 17 cases came before Ombudsman Services which were taken on as a dispute.

### Membership

The membership base continues to remain solid, despite some natural churn occurring when membership subscriptions are up for renewal and when members merge or acquire each other. Total numbers currently stand at 110 members. This is up from 104 members in June 2019. Council and the Secretariat continue to work on prospective members who have expressed an interest in joining and all members are urged to encourage their industry contacts to join. The COVID-19 crisis has not yet had an impact on ITSPA's membership level, however this may well be felt in the coming months. The ITSPA Council continues to follow the situation closely. A full list of members can be found on the ITSPA website.

**Internet Telephony Services Providers' Association**

## Treasurer's Report

The 2019 accounts show a net profit for the year of £29,957 which was slightly less than the previous year of £30,373. Membership fees increased from £138,822 to £157,629. Events income was down from £43,718 in 2018 to £35,303 whilst the associated costs rose from £22,982 in 2018 to £42,893 in 2019.

The Balance Sheet at 31 December 2019 shows current assets of £386,510, including cash at bank of £223,344 and trade debtors of £163,166.

|  | **2019** | **2018** | **2017** | **2016** | **2015** |
|---|---|---|---|---|---|
| Turnover | 192,932 | 182,540 | 182,861 | 162,224 | 165,344 |
| Costs | 162,975 | 152,167 | 150,950 | 140,795 | 154,330 |
| Profit | 29,957 | 30,373 | 31,911 | 21,429 | 11,014 |
| Cumulative Result | 159,000 | 130,000 | 99,000 | 67,000 | 46,000 |

Colin Duffy – ITSPA Treasurer (iNet Telecoms – Voipfone)

## Secretariat Report

ITSPA has worked on a wide range of issues over the course of the year. Outlined below is a listed summary of Secretariat and member activity:

**Consultation Responses/Briefings & Best Practice Documents since the 2019 AGM**

The Industry Developments and Operations Working Groups have worked on the following consultations, research briefings and Best Practice Documents. All documents can be requested by contacting the ITSPA Secretariat. These documents can also be viewed on the ITSPA website.

15/10/20 – Response to Ofcom Wholesale Voice Markets Review 2021-6
11/09/20 – Response to Ofcom consultation on 'Implementing the new European Electronic Communications Code – revised proposals for annual best tariff information and business customer definitions'
03/09/20 – Response to Ofcom consultation on 'Emerging technologies and their potential impact on the communications industry'
03/09/20 – Response to Ofcom consultation: 'Copper retirement – process for determining when copper regulation can be removed'
28/05/20 – Response to Ofcom consultation on Wholesale Fixed Telecoms Market Review 2021-26

05/03/20 – Response to Ofcom consultation on proposals to implement the new European Electronic Communications Code
24/02/20 – Response to Ofcom's Proposed Plan of Work 2020/21
24/02/20 – Letter to Digital Minister Matt Warman MP on IP migration
16/01/20 – Briefing on IP Migration/WLR Withdrawal
14/01/20 – Summary briefing of Ofcom consultation on Wholesale Fixed Telecoms Market Review 2021-2026
23/12/19 – Summary of Ofcom European Electronic Communications Code consultation
16/12/19 – Response to Ofcom consultation on CLI guidelines
10/11/19 – Recommendations for Resilience
07/10/19 – Response to DCMS consultation on Reforming Consumer Advocacy in Telecoms
01/10/19 – IP Migration Guide for members
26/08/19 – Response to DCMS consultation on implementing the European Electronic Communications Code

## ITSPA Updates

One of the Secretariat's tasks since the inception of ITSPA has been to keep the membership informed of developments at Government and industry levels as well as to provide details of ITSPA's latest activities and events. The Secretariat have sent twenty four membership updates via email to members in the past year along with numerous other mailshots outlining other issues and to keep members informed of developments and upcoming events. Members can request further information on particular issues where appropriate and also have the opportunity to make member announcements on the communication. Members are encouraged to ensure as many relevant people within their organisation are signed up to the various ITSPA mailing lists to ensure they are aware of new initiatives being undertaken by ITSPA's working groups and industry news that is relevant to all concerned.

## ITSPA Events since 2019 AGM

**3rd July 2019** - ITSPA Summer Forum at One Park Crescent, Marylebone, London
**7th November 2019** – ITSPA/Cavell Group Dinner on the changing role of the service provider – The Mercer Restaurant, London
**12th December 2018** - ITSPA Christmas Lunch – Radisson Blu Edwardian Hampshire, Leicester Square, London
**28th January 2020** – ITSPA SNITCH Webinar
**5th March 2020** – ITSPA at Cavell Cloud Comms Summit – Queen Elizabeth II Conference Centre, London
**18th June, 3pm 2020** – ITSPA Summer Forum Series: The Annual Market Update with Cavell Group
**23rd June, 3:30pm 2020** – ITSPA Summer Forum Series: An Update on the Shift to All-IP with Openreach
**25th June, 4pm 2020** – ITSPA Summer Forum Series: Regulatory Hot Topics
**9th July, 4pm 2020** – COVID-19. The impact, the response and future trends

## Internet Telephony Services Providers' Association

**24th July, 3pm 2020** – STIR and Shaken in the UK
**10th November, 3pm 2020** – ITSPA Comms Data Webinar









### ITSPA Awards 2019

**Award Winners:**
- Best ITSP - Small Enterprise: **TTNC Limited**
- Best ITSP - Mid Market: **Foehn**
- Best ITSP - Large Enterprise: **RingCentral**
- Best SOHO ITSP: **Dial 9 Communications Limited**
- Best Multi-national Solution: **Pure IP**
- Best VoIP Infrastructure: **Netaxis Solutions**
- Best VoIP Device: **Snom Technology GmbH**
- Best VoIP Software: **X-on**
- Best VoIP Innovation: **Voxbone**

- Best VoIP Vertical Solution: **X-on**
- Best Wholesaler: **Gamma**
- ITSPA Hero: **Peter Gradwell**

Highly Commended:
- Best ITSP - Small Enterprise: **Fuse 2 Communications Ltd**
- Best ITSP - Mid Market: **X-on**
- Best Multi-national Solution: **Vonage**
- Best VoIP Device: **Yealink**
- Best VoIP Software: **Voxbit**
- Best VoIP Innovation: **Nuvias Group**
- Best Wholesaler: **TelcoSwitch**

## List of Council Members – June 2019 - November 2020

| Name | Company | |
|---|---|---|
| Colin Duffy | Voipfone | Elected 2018 |
| Eli Katz | XConnect | Elected 2018 |
| Dan Winfield | Voxhub | Elected 2018 |
| David Cargill | Vonage | Elected 2018 |
| Trefor Davies | Babelisk | Elected 2018 |
| Guy Miller | TalkTalk Business | Elected 2018 |
| Jolyon Parsons | Ciptex | Elected 2018 |
| Tracey Wright | Magrathea | Elected 2018 |
| Alex Jennings | Gradwell | Elected 2018 |
| Lee Turner | Gamma | Elected 2018 |
| Alex Kinch | Ziron | Elected 2019 |
| Nick Holland | 8x8 | Elected 2019 |
| Simon Burckhardt | bOnline | Co-opted 2020 |

## List of Working Group Chairs – June 2019 - November 2020

**Industry Developments Working Group:** Tracey Wright (Magrathea)
**Operations Working Group:** David Cargill (Vonage)
**Promotions Working Group:** Trefor Davies (Babelisk)