



IMS Forum

The Voice of IP Convergence

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IN THIS ISSUE



Message from
the Chairman



Industry
Roundup



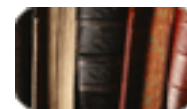
IMS Forum
News



Working Group
Update



Member
Profile



Regulatory
Update

MESSAGE FROM THE CHAIRMAN



Michael Khalilian
IMS Forum Chairman
& President

Fellow IMS Forum Members and Friends:

I am pleased to update you on our continued progress in growing the IMS Forum, in addition to the overwhelming enthusiasm generated worldwide in regard to the promise that IMS holds.

In an article entitled, **Dare We Say it? Convergence**, which appeared July 24 in the *Austin American Statesman*, writer David Ho astutely commented that, "Industry leaders say this long-heralded world of "convergence" is much closer, bridging wired and wireless, cable and telephone, Internet and television. Many are betting on the developing technology standard called Internet protocol multimedia subsystem, or IMS, to make it happen....IMS is envisioned as a glue holding many technologies together, a common technical framework to bind fragmented communications networks never meant to easily talk with each other."

As you can see, the momentum behind IMS is growing exponentially with every passing day. Results from a recent survey conducted by the IMS Forum and its partner, Cantata, show that more than 75 % of respondents stated that IMS is a priority, and part of their respective company strategies for this year. When queried as to specific timeframes on when the first phase of their respective IMS infrastructures will be in place, more than 40% of respondents acknowledged that they already have the appropriate infrastructure in place, or expect to in 2007 ([Full survey results can be found on IMS Forum News page](#))

The next few months will prove to be very exciting, as the IMS Forum and its members will be quite active and participating in several events worldwide. At month's end, Forum members will be on hand in Washington at the Fierce Markets IMS Executive Summit (www.imsevent.com), taking place August 29-30, 2006. The two-day conference, whose sponsors include the IMS Forum and member companies IntelliNet Technologies, MetaSwitch and TEKELEC, will provide service providers and other telecom professionals a venue in which to address pressing issues in the marketplace, and hear keynote presentations from leading industry experts include Janet Davidson, chief strategy officer, Lucent Technologies, and Scott Erickson, president, IMS Service Delivery Solutions, Telcordia.

Later this FALL, in September and October, the IMS Forum will be on hand at Fall 2006 VON in Boston, COMPTEL *PLUS* Conference & EXPO in Orlando, and the IMS EXPO/Interne Telephony Conference & EXPO in San Diego (Full event calendar on [events calendar page](#)).

In addition, the IMS Forum has a number of initiatives forthcoming on which we look forward to working with our industry colleagues, such as our third White Paper detailing the role of Voice Call Continuity in the IMS framework, which we will present later this Fall.

Thank you for your continued interest in and support of the IMS Forum.

All my best,

Michael Khalilian
Chairman & President
The IMS Forum
"The Voice of IP Convergence"
www.IMSForum.org
MKhalilian@IMSForum.org

INDUSTRY ROUNDUP

WiFi phone Market Soaring to \$3.7B in 2009

According to Infonetics Research, the worldwide WiFi phone market increased 116% between 2004 and 2005 to \$125.5 million, and is projected to more than double in 2006 as enterprises and consumers slowly but steadily continue deploying voice over wireless LANs.

The analyst group projects WiFi phone revenue to more or less double, and even nearly triple, every year through 2009, when the worldwide market will reach \$3.7 billion.

Initially an enterprise application, VoWLAN will eventually become more popular with consumers as well, having enormous growth potential as part of a VoIP service bundled with broadband connections.

-- Infonetics Research

VoIP Service Revenue Doubles in North America, Europe, Asia Pacific in 2005

VoIP service revenue roughly doubled in North America, Europe, and Asia Pacific from 2004 to 2005, and is expected to continue booming at least over the next 5 years, says Infonetics Research in its new VoIP Services report. A combined \$120 billion will be spent on VoIP services between 2005 and 2009 in the 3 regions.

-- Infonetics Research

3G Americas Publishes White Paper on IMS Architecture

3G Americas, a wireless industry association published a white paper that focuses specifically on IMS architecture, as defined by the 3rd Generation Partnership Project (3GPP), as the new application enabler for IP-based multimedia services. The paper, entitled IMS: Application Enabler and UMTS/HSPA Growth Catalyst, addresses the ways in which 3GPP IMS architecture is best suited for the blending of real-time and non real-time multimedia services, and how it optimizes the application life-cycle through rapid and efficient service creation and deployment. The paper describes how IMS will play a key role in the introduction of these new revenue-generating services, and how the deployment of the GSM evolution through UMTS/HSPA will improve the user experience and generate demand for additional services. The IMS: Application Enabler and UMTS/HSPA Growth Catalyst white paper was collaboratively developed by 3G Americas' board member companies and is available for free download at the 3G Americas' website: www.3gamericas.org.

-- In-Stat Research

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For information on becoming an IMS Forum member, please visit our website at www.imsforum.org or contact Debbie Hetland at DHetland@IMSForum.org.

IMS FORUM INDUSTRY NEWSLETTER

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CHAIRMAN & PRESIDENT Michael Khalilian
(321) 230-3070 MKhalilian@IMSForum.org

DIRECTOR OF TECHNICAL WORKING GROUPS Marian Stasney
(512) 853-9598 Marian@IMSForum.org

PROJECT MANAGER Debbie Hetland
(510) 744-4020 DHetland@IMSForum.org

PRESS CONTACT M. Mostafa Razzak
(646) 442-3361 M.Razzak@23-31.com

NEWSLETTER DESIGNER Barry Malawski

IMS FORUM HEADQUARTERS

39355 California St.
Suite 307
Fremont, CA 94538
Main Phone: (510) 744-4020
Fax: (510) 608-5917
www.imsforum.org
info@imsforum.org

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(continued on page 3)

Consortium to Develop 'A-IMS' - Evolution of Next-Generation Architecture for Mobile Networks

Verizon, together with Cisco, Lucent Technologies, Motorola, Nortel, and Qualcomm, today announced a vision for the advancement of next-generation network architecture for wireless mobile telecommunications networks. Their goal has been to develop enhancements to a well known, emerging architecture, known as IMS (IP Multimedia Subsystem). The multi-vendor team has generically termed this architecture A-IMS -- for Advances to IMS -- in order to reflect its evolution from work done earlier in technology standards bodies. The A-IMS architecture developed by the task force provides solutions to implement next-generation services in current networks, as well as creates a foundation for the efficient

The A-IMS standard is based on several key architectural principles, including:

- * Comprehensive Security
- * Uniform Treatment of SIP and non-SIP Applications
- * Dual Anchoring
- * Three-Layer Peering

According to IDC, Mobile Phone Shipments Continue Robust Growth in the Second Quarter

After an impressive first quarter, worldwide mobile phone shipments fell just short of an all-time high in the second quarter of 2006 with volume of 237.8 million units. The robust quarter was enough to boast a 2.1% increase from the first quarter, and 22.5% more than the same quarter one year ago. According to IDC's Worldwide Mobile Phone Tracker, 470.7 million units have shipped so far in 2006, which suggests that the industry may be close to shipping 1 billion units for the full year.

While the majority of handset shipments were made up of entry-level devices, the second quarter also witnessed strong growth in handsets capable of utilizing bulked-up, third generation network infrastructure. With EV-DO and UMTS now common in the many regions throughout the world, 3G networks and services are becoming an increasingly significant part of the mobility world. The presence of established high-speed networks has resulted in the introduction of new handsets capable of video conferencing, Internet access at broadband speeds, and real-time content sharing, all of which drove increased demand during the second quarter.

-- IDC

Strong Interest by US Businesses in 3G Service; Mid-Sized Companies Have Greatest Reliance on Wireless

Nearly 5% of employees in US companies report that they have already adopted 3G services and an additional 15% to 20% would be likely to do so reports In-Stat (<http://www.in-stat.com>). In addition, a recent survey of over 1,000 business users conducted by the high-tech market research firm revealed that mid-sized companies – those with 100 to 1000 employees – have the greatest penetration of wireless among their workforces and spend the most on mobile communication.

Recent research by In-Stat found the following:

- Nearly 30% of employees surveyed indicated they would like to use a mobile email device. Current usage is

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(continued on page 4)

under 15% among respondents.

- Among Wi-Fi users who pay for access, mean monthly spending for all business sizes is roughly \$40 per month.
- About 10% of respondents who have monthly subscriptions to Wi-Fi also use pay-per-usage hotspots, causing unforeseen telecommunication expenses for their companies.

Many businesses and employees place a high premium on Internet access, with a large number spending as much or more for Wi-Fi as they spend on monthly cellular bills.

-- In-Stat Research

Service Providers want IMS to Enable Service Creation

Service providers want IMS to enable service creation, but little is understood about the orchestration on the fulfillment and assurance sides, which could be the deal breaker in bringing IMS to life.

Customers want more choices. Rather than remaining locked into one-size-fits-all product offerings, they want to mix and match the mobile, wireline, TV and content services and brands they like.

That means telecom will have to shift its mindset toward the more flexible approach employed by companies such as Google or Yahoo, whose service-oriented models allow customers to choose from hundreds, if not thousands of services.

-- Billing World & OSS Today



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IMS FORUM AND CANTATA RELEASE SURVEY RESULTS EXAMINING CURRENT AWARENESS, VALUE AND INDUSTRY PERCEPTION OF IMS

According to survey results taken from a sample population of telecommunications professionals who attended GLOBALCOMM 2006:

- More than 75 % of respondents stated that IMS is a priority, and part of their respective company strategies for this year.
- Of 32 surveyed, 21 carriers are actively planning IMS strategies, while 7 are actively trialing and deploying.
- When queried as to specific timeframes on when the first phase of their respective IMS infrastructures will be in place, more than 40% of respondents acknowledged that they already have the appropriate infrastructure in place, or expect to in 2007.

Respondents, when asked to name the most valuable benefits that IMS delivers, nearly 75 % identified lower deployment and OPEX, improved subscriber management and increased customer retention as top on their respective lists

IMS FORUM HOST IMS CLASSROOM AT COMPTEL *PLUS*

The IMS Forum is pleased to be an association sponsor for the upcoming COMPTEL PLUS Fall 2006 Convention & EXPO. At this event, the IMS Forum will participate in the COMPTEL Classroom, on Monday, October 9 from 11-11:30 a.m., presenting a technological overview of IMS, examining its revenue generating possibilities and addressing current deployments.

In addition, the IMS Forum will host an IMS-dedicated conference track, the IMS Workshop, on Monday, October 9, from 3:10 PM - 5:00 PM. This workshop will feature two sessions addressing IP Multimedia Subsystem (IMS) ; specifically, (I) an in-depth analysis examining its basic principles and promise, as well as (II) challenges and opportunities currently facing carriers/service providers, hardware vendors and application developers. In addition to hearing insight from the IMS Forum Executive team, attendees will have the opportunity to interact directly with top industry pioneers in regard to their organizations' current IMS deployments/ case studies and correlating results.

Please note there is a separate registration fee of \$125 to attend this event and you must register in advance. For additional information on the IMS Forum, please visit www.imsforum.org

TRENDIUM LAUNCHES INTEROPERABILITY CERTIFICATION PROGRAM

Trendium, Inc., the leading provider of service management and performance software, today announced the launch of its Interoperability Certification Program. The Program, unique to the industry, will provide information technology, service optimization and network traffic management vendors an environment in which they can effectively test their respective solutions prior to deployment. "In today's telecommunications marketplace, in which consumers demand IP-based communications - such as Voice-over-IP and IPTV - over a single network, carrier and service provider revenues are directly linked to their systems' service performance, thereby driving the demand for service management software," said Hanafy Meleis, CEO and president, Trendium, Inc.

In establishing the Interoperability Program, we are providing instrumentation vendors the necessary tools and support with which they can test the interoperability, effectiveness and quality of their solutions (with the service management software), prior to deployment, and more importantly, deliver service providers the means to reduce integration costs, operating expenses and deployment time-to-market."

The Program, open to all instrumentation vendors working with IPTV, VoIP and traffic management, provides an opportunity to develop end-to-end solutions using industry-proven service management systems. Upon successful completion of the Interoperability Program, a detailed solution paper, which will include all the modeling needed to manage the respective services, will be presented accordingly.

To inquire about Trendium's Interoperability Program, please contact Tom Leh, 954 835-9500 / tleh@trendium.com, or visit www.trendium.com/interop.html

IMS FORUM CONTINUES TO EDUCATE INDUSTRY ON IMS

The IMS Forum, in an effort to further its mission to educate the industry, has a new addition to its website. Open to the public, is the new "Educational Information" web page. Members and Non-Members are invited to share publicly-available technical white papers and technical information regarding IMS-related efforts."

To access the web page, open the link to Documents and Working Groups (http://www.imsforum.org/documents_wg/educational_info.shtml). To submit documents for inclusion, email to dhetland@imsforum.org. Please note that the IMS Forum reserves the right of editorial control.



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MARK YOUR CALENDAR

The IMS Forum will participate in the following events this year. Please let us know if you are interested in speaking or exhibiting at any of these events by contacting Debbie Hetland via email at dhetland@imsforum.org or by calling (510) 744-4020.

August 8–10, 2006 Santa Clara, CA	<u>3rd Annual VoIP Developer Conference</u> (Conference: August 8–10, Exhibits: August 9–10)	• Event
August 29–30, 2006 Washington, DC	<u>Fierce Markets IMS Executive Summit</u> A discount of \$300 off of the registration rate (at the time of registration) for any IMS Forum registrants.	• IMSF Sponsor, Attend
September 11–14, 2006 Boston, MA	<u>Fall 2006 Von</u>	• IMSF Speak, Attend
September 12–14, 2006 Los Angeles, CA	<u>CTIA 2006</u>	• Event
October 8–11, 2006 Orlando, FL	<u>COMPTEL PLUS Fall Convention & EXPO</u>	• IMSF Sponsor, Speak, Exhibit, meeting
October 10–13, 2006 San Diego, CA	<u>IMS Expo/ IT Conference and Expo</u> (Fall 2006)	• Speak, Exhibit
December 4–7, 2006 Dallas, TX	<u>TeleManagement World Dallas</u>	• Event
January 7, 2007 Las Vegas, NV	<u>Consumer VoIP SUMMIT (VON)</u>	• Event
January 23–27, 2007 Ft. Lauderdale, FL	<u>IMS Expo/ IT Conference and Expo</u>	• Event
February 12–15, 2007 Barcelona, Spain	<u>3GSM</u>	• Event
March 5–8, 2007 Orlando, FL	<u>VoiceCon 2007</u>	• Event
May 7–9, 2007 Las Vegas, NV	<u>NCTA: The National Show</u>	• Event
June 18–21, 2007 Chicago, IL	<u>GLOBALCOMM 2007</u>	• IMSF Speak, Exhibit, Meeting

WORKING GROUP UPDATE

August 2006 Working Group Update

SCIM Study Group

The SCIM Study Group has decided to revise and improve the "IMS Technology Framework V2.0: The Coordination of Multiple Services in an IMS Domain" paper. I am putting together a working project plan for continuing work on important topic. Please email marian@imsforum.org or call me at 512-853-9598 if you wish to participate.

VCC Study Group

A new Study Group has been formed and is co-chaired by Atul Varshneya of BayPackets, Inc. and Meenal Agarwal of UTStarcom. The topic is voice call continuity (VCC) handover implications. This will be a feasibility study of the 3GPP-adopted method (static anchoring-IMS control model and other proposed methods - static anchoring CS domain control, dynamic anchoring and others via 23.806), as related to the VCC between IMS domain and circuit switched domain. The Study Group will analyze this topic from the viewpoint of business and financial implications for the service provider. The paper will be published in early September.

"During the course of Release 6, TS 23.234 [2] (3GPP system to Wireless Local Area Network (WLAN) interworking: System description) was developed that provides the possibility to offer VoIP over WLAN interworking with IMS. Thus there is the possibility to support the most prevalent GSM service (voice calls) over I-WLAN when there is coverage. By developing the capability to support seamless voice call continuity between the CS Domain and an I-WLAN, or other IP-CANs, an operator would be able to provide relief to the GSM/UMTS radio resources and increase service revenue. In addition, wireline operators with VoIP offerings should be able to use the 3GPP IMS architecture to offer converged services."

"A number of alternative architectural solutions that enable Voice Call Continuity between CS and IMS domains have been proposed and documented. The outcome is that two alternatives remained: Original Domain Controlled (clause 6.4) and IMS Controlled Static Anchoring (clause 6.3)."

The goal of the TWG is to form Study Groups with specific intellectual property to support the technical demonstrations and interoperability testing planned for later this year, as well as early next year. The selection of topics will be ranked with these goals in mind, as well as the goal of IMS Forum toward best practices, technical specifications and implementations, and reference architectures. The TWG (or its subsidiary Study Group) meets every other Tuesday. Our next meeting for the VCC group will be July 25, 2006 at 4:00 Central time, 650-413-6020, pass code #0015. Please identify yourself clearly to the call.

Ongoing Progress

An application has been made to the 3GPP for Market Representation Partner (MRP) status. The goal is to establish a liaison partnership with the 3GPP in order to:

- ✦ Disseminate information
- ✦ Assign a liaison representative from both groups
- ✦ Attend representation meetings
- ✦ Summarize information presented
- Communicate ideas and common goals

Also of note is application to the Telemangement Forum for status as a liaison partner with the same goals in mind. If you are interested in participating as a liaison for either of these groups, please email me.

Inclusion in the Technical Working Group Study Groups

As the IMS Forum continues to add quality organizations to its membership, the strength of the Technical Working Group grows as well. Attendance at bi-weekly conference calls is at an all-time high and we continue to add value to every call, with guest speakers and open discussions surrounding the technical and business issues facing early adopters of IMS. If you or a team member is not currently on the mailing list, receiving notices of bi-weekly conference calls, et cetera, please email DHetland@imsforum.org for inclusion or login in to the private member website and opt in.



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August 29-30, 2006

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Q&A with Cantata CEO, Marc Zionts

IMS Forum: *Tell us about Cantata and your products.*

Cantata Technology was launched in March of 2006 through the combination of Excel Switching and Brooktrout Technology. Cantata is headquartered in Massachusetts, with a strong global presence in countries including Belgium, the United Kingdom, The Netherlands, Canada, Singapore, China and Japan. As IP-based real-time communications transform the service provider and enterprise landscape, it gives businesses and consumers powerful new ways to connect and communicate anywhere at anytime.

Cantata is on the forefront of this transition providing service providers worldwide with IMS-enabled infrastructure and enabling technology - media and signaling gate-

way, IP media server and programmable services platform products - that give operators advanced service creation and delivery capabilities resulting in powerful time-to-market advantages. Cantata gives carriers the flexibility, scale and speed to rapidly develop, deploy, and deliver generation upon generation of high value, real-time packet-based applications across fixed and wireless network topologies – maximizing carrier ROI and revenue growth.

IMS Forum: *What can the IMS Forum do for your company?*

As a founding member of the IPCC and now the IMS Forum, Cantata shares in the mission of the IMS Forum, to accelerate the adoption of the IMS architecture. There has been a lot of hype regarding IMS, making a guiding organization like IMS Forum necessary to help companies cut through the clutter. The IMS Forum and Cantata both focus on real-world implementations of IMS, to help early adopters avoid potential pitfalls, and in the process create best-practices examples for later adopters. In addition, the IMS Forum and Cantata are both dedicated to driving alliances among industry groups—such as WC3, 3GPP and IETF—that are involved with IMS development.

Cantata is now working closely with the IMS Forum on various initiatives, including establishing working groups, hosting events, conducting surveys and providing guidance to companies transitioning to IMS.



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REGULATORY ROUNDUP

Universal Service Fund Contributions – VoIP Service Provider Implications

By Lisa Start, Attorney at Law, lisastart@comcast.net , Staci Pies, Vice President, Governmental and Regulatory Affairs, PointOne, Inc., spies@pointone.com

On June 27th, The U.S. Federal Communications Commission (FCC) released a Report and Order and Notice of Proposed Rulemaking (NPRM) FCC 06-94 approving two changes to Universal Service Fund (USF) contribution methodology.

The first was to increase the "Safe Harbor" percentage for wireless carriers from 28.5 percent to 37.1 percent. The second was to require providers of interconnected Voice over Internet Protocol ("VoIP") service to contribute to the Universal Service Fund ("USF") on their interstate and international end-user telecommunications revenues.

To fulfill this obligation, interconnected VoIP providers have three options: (1) they may use the interim safe harbor established in the Order, 64.9 percent of their end-user telecommunications revenue; (2) they may report based on their actual interstate and international telecommunications revenues; or (3) they may rely on traffic studies, subject to the conditions set forth in the Order.

However, providers who use a traffic study to prove a lower rate, unlike wireless providers, must petition the Commission and must be pre-approved by the FCC. If the Commission doesn't immediately approve the traffic study, as is likely due to time constraints, the provider must pay at the 64.9% safe harbor rate. If the provider chooses to pay based on actual revenues, the provider would "no longer qualify for the preemptive effects of the Vonage Order and would be subject to state regulation."

The contribution percentage, the amount a provider must pay to the fund, for the second quarter of 2006 was 10.9%. The proposed contribution for the third quarter (July – September) is 10.5%. Meaning that if the contribution factor was 10.5% for the fourth quarter an interconnected VoIP service provider would pay a 10.5% contribution on 64.9% of end-user telecommunications revenues. The contribution factor is usually adjusted each quarter, based on payments received from providers.

Under the rules, an interconnected VoIP service provider of interstate and international telecommunications whose annual universal service contribution is expected to be less than \$10,000 (\$2,500 for the fourth quarter 2006) is not required to contribute to the USF. However, interconnected VoIP providers are still required to file a Telecommunications Reporting Worksheet to support the conclusion that the de minimis exception is applicable.

Interconnected VoIP service providers must follow the same basic USF reporting procedures as other providers of interstate and international telecommunications. USF Contributors report historical gross-billed, projected gross-billed, and projected collected end-user interstate and international revenues quarterly on FCC Form 499-Q. Interconnected VoIP service providers must file FCC Form 499-Q beginning on August 1, 2006. USF contributors report gross-billed and actual collected end-user interstate and international revenues on FCC Form 499-A on April 1 of each year. Therefore, Interconnected VoIP service providers must file a completed FCC Form 499-A beginning on April 1, 2007.

However, even under the de minimis rules every interconnected VoIP provider that has not already registered with the Commission must complete blocks 1, 2, and 6 of FCC Form 499-A and file by the August 1st deadline.

Interconnected VoIP service providers who do not submit their FCC Form 499-Q or 499-A by the due date are subject to a late filing penalty calculated at a rate of .005 percent applied to their total contribution base revenue with a minimum penalty of \$100 and a maximum penalty of \$5,000.

The Commission defined "interconnected VoIP services" as those VoIP services that: (1) enable real-time, two-way voice communications; (2) require a broadband connection from the user's location; (3) require IP-compatible customer premises equipment; and (4) permit users to receive calls from and terminate calls to the Public Switched Telephone Network ("PSTN"). The Commission emphasized that interconnected VoIP services offer the capability for users to receive calls from and terminate calls to the PSTN.

The new requirements apply to all VoIP communications made using an interconnected VoIP service, even those that do not involve the PSTN. Those requirements apply regardless of how interconnected VoIP providers facilitate access to and from the PSTN, whether directly or by making arrangements with a third party. The Commission also stated that it may need to expand the definition of interconnected VoIP services as new VoIP services increasingly become an alternative to traditional phone service.

The Commission also discussed that some interconnected VoIP providers hold themselves out as telecommunications carriers, while others consider themselves to be end-users instead. Carriers that provide telecommunications service inputs to those that consider themselves to be end-users of interconnected VoIP providers have been reporting the resulting revenues as end-user revenues and including them in their contribution bases. The Commission also stated that carriers supplying telecommunications services to interconnected VoIP providers who are not themselves carriers should continue to include those revenues in their own contribution bases for two full quarters after the effective date of the Order. In addition, the Commission stated that wholesale carriers may not exclude these revenues by invoking the "carrier's carrier" rule during the interim period.

The Commission stated that it believes its "measured interim steps" will stabilize the USF contribution base in the near-term while the Commission considers more fundamental reform to the contribution margin computation. The Commission noted that a change to a non-revenue-based contribution computation would require significant time to implement. Therefore, the Commission retained a revenues-based approach on an interim basis so it could implement the revisions, including reporting requirements, for the fourth quarter 2006 universal service contribution requirements. The Commission stated while it retained the revenue-based approach in the interim, it is committed to examining more fundamental reform.

What Next?

If you determine that you are required to file as an interconnected VoIP provider, you need to accomplish the following immediately.

1. The final deadline for filing the FCC Form 499 Q (which is a revenue projection worksheet that must

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be filed quarterly) is AUGUST 1, 2006.

2. Prior to being able to file this form you have to make 3 other filings: (1) Registration with the FCC to obtain a FCC Registration Number (FRN); (2) registration with USAC (the Universal Service Administration Corporation); and (3) FCC Form 499 A registration.

USAC and 499 A Registration

Both require the signature of an officer of the company and must be mailed in to USAC:

Form 499 Data Collection Agent
c/o USAC
2000 L Street, N.W.
Suite 200
Washington, D.C. 20036

A copy of the form 499 A registration must also be mailed to:

Chief,
Market Disputes Resolution Division,
Enforcement Bureau
Room 5-A865
445 12th Street, S.W.
Washington, D.C. 206554

FRN Registration

- A very simple process which can be accomplished on line at the link below
<https://svartifoss2.fcc.gov/coresWeb/publicHome.do>

USAC Registration

- Registering with USAC allows you to make all other USF filings electronically. This first step has to be done in hard copy and must include the signature of an officer of the company. Once you submit the registration, USAC assigns a number that will allow you to make all future filings on line. If you don't have sufficient time to submit the form and receive the registration number in advance of the August 1 deadline, you will have to make that filing in hard form as well.
- The form you have to fill out for USAC is at the link below. You need to complete Blocks 1-3 and 13-14.
- This form must be signed by an officer of the corporation.
- If you get this form in right away, it may enable you to make the August 1 filing on line, so the sooner the better.

<https://forms.universalservice.org/form498/PDF/form498.pdf>

FCC Form 499 A

- Complete 3 blocks of the Form 499 A (which be will have to completed in its entirety for January 1, 2007). Blocks 1, 2 and 6.
- The initial filing is a registration and requires certain legal information. You must designate a registered agent to receive service of process in Washington, D.C. Once you get the USAC registration number you may be able to do this part on line as well. The form must be signed by an officer of the corporation.

http://www.universalservice.org/res/documents/fund-administration/pdf/499/499a_2006.pdf

FCC Form 499 Q

- <http://www.universalservice.org/res/forms/fund-administration/499Q.pdf>
- See filing instructions included in FCC order and errata for details regarding how to calculate projected collected revenues

Information regarding payment obligations for the August 1 filing

- Submit revenue information covering April 1-June 30 and projections for October 1-December 31;
- USAC reports the data to the FCC around September 1;
- The FCC issues the contribution factor for the next quarter sometime before September 15th;

- USAC providers by October 15th; and
- You have until November 15th to pay.
- USAC splits the quarterly amount into monthly assessments and will invoice you monthly. You then have one month to pay before penalties are assessed.
- Then you start all over for each quarter with quarterly revenue filings due on Feb 1, May 1, August 1, and November 1 and the annual filing due on April 1.



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