

Carrier-grade Voice for the Cloud and AI Era

The voice market is evolving rapidly, driven by the growth of cloud communications ecosystems, including UCaaS, CPaaS, and emerging Voice AI technologies.

\$32bn → \$100bn

Global CPaaS market growth forecast from 2025 to 2030

[CPaaS Acceleration Alliance \(CPaaSAA\)](#)



What's Driving the Market?

UCaaS platforms such as Microsoft Teams are continuing to see strong global adoption as organisations modernise telephony and collaboration. At the same time, CPaaS providers are embedding voice, SMS, video, Interactive Voice Response (IVR) and other real-time communications directly into applications, workflows and customer journeys.

This includes AI-powered voice bots and automation platforms, which rely on high-quality, globally interconnected infrastructure to deliver seamless customer experiences. Amidst the broader market shift to cloud communications, providers are also navigating PSTN switch-off targets, hybrid working models and evolving customer expectations.

Why this Matters for Providers

Now more than ever, customers no longer view voice as a standalone service, but instead expect fully integrated communications, spanning connectivity, collaboration and telephony, delivered via one trusted provider.

This is a huge opportunity for regional service providers, channel partners, UCaaS providers and CPaaS organisations alike.

What You'll Discover



Unlock New Opportunities

Explore how cloud communications create new revenue potential



Simplify Voice Expansion

Overcome complexity across global coverage and operations



Scale with Confidence

Build future-ready voice services for customers worldwide

The Market Shift to Cloud Communications

40⁺ million

Telephony-enabled Microsoft Teams users in North America and Western Europe by 2027 – 4x growth since 2022

([Cavell](#))

\$85.4 billion

Worldwide Unified Communications and Collaboration (UC&C) market cumulative revenue between 2025-2029

([IDC](#))

\$28⁺ billion

Global CPaaS market value by 2027

([S&P Global](#))

90⁺ million

Global remote jobs estimated to by 2030 – a 25% growth from 2023

([World Economic Forum](#))

300 million

VoIP lines forecast to outnumber PSTN lines by the end of 2031, with VoIP penetration surpassing PSTN across 145 countries

([TeleGeography](#))

80%

Of common customer service issues autonomously resolved by agentic AI by 2029, with a 30% reduction in operational costs

([Gartner](#))

Barriers to Voice Expansion

By owning and controlling the global numbers and voice services layer, service providers, channel partners, UCaaS providers and CPaaS organisations can boost recurring revenue, improve profitability and retain more long-term customers, while supporting UCaaS, CPaaS and emerging AI Voice use cases.

This is particularly relevant as AI-driven voice applications, such as customer service automation and voice bots, become a growing source of traffic and revenue.

However, expanding voice capabilities often comes with operational challenges including:



PSTN Replacement & Legacy Infrastructure

Managing the transition away from legacy PSTN services while maintaining continuity and service quality



Regulatory & Compliance Complexity

Navigating regulatory requirements, number portability and varying legal frameworks across multiple international markets



Global Coverage & Number Management

Supporting multi-site and international customers with scalable global numbering and consistent voice coverage



Reliance on Multiple Voice Carriers

Heavily depending on many different carriers increases operational complexity, while limiting control over service quality, pricing and customer experience



Manual Provisioning & Operational Complexity

Replacing fragmented and manual provisioning processes with more centralised and scalable service management



Performance, Resilience & Call Quality

Delivering reliable, high-quality voice experiences across global cloud communications environments



The Cloud Communications Opportunity

As global businesses turn to cloud-based services to transform their communications, users are looking for performance that matches their experience of other digital services.

Customers now expect reliable connectivity across global locations, and support for AI automated service agents that can be seamlessly integrated with existing systems.

UCaaS vs CPaaS

UCaaS

- A comprehensive platform for communication and collaboration
- Combines voice, video and messaging in one platform
- Provides a unified interface for communications

CPaaS

- A flexible platform for embedding communications
- Uses APIs to integrate communications into software
- Enables customised communications within applications

Cloud-based communications solutions such as SIP trunking, global numbers and voice services form the backbone of both UCaaS and CPaaS, replacing traditional physical infrastructure with virtual connections. This allows communications traffic to travel via the internet with greater reliability, flexibility, and lower costs.

Global SIP trunking and cloud voice enablement also allow regional providers to compete in the market without needing to invest in their own costly infrastructure. This provides a scalable, carrier-grade foundation for telephony, meetings, collaboration tools, embedded voice, multi-site deployments, international expansion and more, while simplifying operations.

Partnering for Cloud Voice: The Benefits

The right cloud voice partner can provide a flexible route for providers to boost revenues and adapt to changing communications demands, with the agility of a mid-sized organisation and the reach of a global provider, delivering value across several key areas:

Recurring Revenue & Margin Expansion

Grow recurring revenue and expand margins through scalable voice services that evolve with customer demand

Service Ownership & Customer Retention

Strengthen the customer proposition, retain ownership of the customer relationship and support long-term retention

Global Reach Without Global Infrastructure

Expand service reach internationally with access to voice, data and colocation services, without the cost and complexity of building global infrastructure



Scalability & Commercial Flexibility

Simplify service management, scale more efficiently and adjust service offers with greater commercial flexibility, through a more agile partner model

High Performance & Resilience

Support consistent call quality, resilient performance and dependable service delivery across locations

Simplified Management

Simplify service delivery by centralising provisioning, visibility, and control, reducing complexity for internal teams and making voice services easier to manage at scale

Epsilon Global Voice & SMS

Epsilon has over 20 years of experience in voice services, supported by a global, carrier-grade infrastructure with 500+ Points of Presence (PoPs) and coverage in over 150 countries. We combine global reach with the flexibility of a mid-sized provider.

Epsilon's global network supports a broad range of voice services across diverse markets, including:



SIP Trunking

Providers can access Epsilon's global voice network through interconnection points in the UK, US, Hong Kong and Singapore



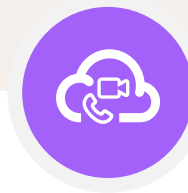
SMS Messaging

Epsilon and KT provide high-volume SMS delivery, including fast and reliable A2P messaging to South Korea



Global Inbound Services

Access local, national, mobile and toll-free numbers across 150+ countries



Cloud SBC

Extend private global voice and video connectivity through high-availability SBC infrastructure



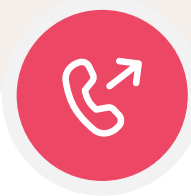
Global PSTN Replacement

Provide PSTN coverage across 95+ countries and replacement in 60 markets



Voice Signalling & Media Conversion

Bridge TDM and VoIP environments through end-to-end media and signalling conversion, including SS7 via SigTran



Outbound Call Termination

Enable international and local call termination through premium routes, supported by Epsilon's PSTN replacement service



Microsoft Teams Direct Routing

Securely connect SIP providers to Microsoft Teams through certified cloud-based SBCs



UCaaS Enablement

Automate the provisioning and management of Microsoft Teams, Zoom Phone and Cisco Webex Calling



Data & Colocation Services

Extend voice services with Epsilon's global data connectivity and colocation capabilities to support broader cloud communications environments

These services are accessible through Infiny, Epsilon's Network-as-a-Service (NaaS) platform, which provides self-service, on-demand connectivity and communications services, including ready-to-purchase numbers.

Epsilon's voice portfolio supports future automation and centralised management across cloud communications environments, helping customers to move away from legacy infrastructure.



Scaling Global Communications with Automated Voice Solutions

Twilio, a leading cloud-based Customer Engagement Platform (CEP) that combines communication APIs with AI, partnered with Epsilon to enhance its global voice capabilities.



Challenge

To support a rapidly growing international customer base, Twilio needed a more efficient way to procure and deploy numbers across its CPaaS platform. Managing these resources at scale required a solution that could remove the complexity of manual procurement.



Solution

Epsilon provided a comprehensive, one-stop solution for managing voice services globally. By leveraging automated ordering and provisioning via APIs, Twilio was able to seamlessly deploy and manage geographic and toll-free numbers within its existing architecture.



Outcomes

The integration of Epsilon's voice services into Twilio's platform accelerated its customers' ability to build and launch communication applications with enhanced usability and end-user experiences, while supporting Twilio's continued international expansion.



Challenge

Managing a fragmented supply chain of multiple local carriers led to high operational complexity, inconsistent service levels, and billing challenges. Additionally, limited global reach and rigid traditional carrier models made it difficult for HybrIT to respond quickly to customer needs in harder-to-reach international markets.



Solution

HybrIT partnered with Epsilon to consolidate its global voice services into a unified platform, supporting inbound and outbound voice with global Direct Inward Dialing (DID) and toll-free services. The platform integrated seamlessly with HybrIT's multi-region Session Border Controller (SBC) and Microsoft Teams Direct Routing, backed by a flexible delivery model that allowed for agile deployment, enhanced visibility, and full control across global markets.



Outcomes

With Epsilon as its global voice partner, HybrIT is well positioned to scale its communications offerings in international markets, including complex multi-country deployments. HybrIT has already expanded into previously inaccessible regions and secured significant new global customers, increasing its international revenue.



Simplifying Global Voice Transformation

HybrIT, a technology solutions provider specialising in advanced IT and communications services, partnered with Epsilon to transform its global voice strategy and support enterprise-grade collaboration solutions like Microsoft Teams.



Future-Proofing Your Voice Strategy

The shift towards cloud-first communications and AI-driven voice presents a significant opportunity for service providers, channel partners, and UCaaS and CPaaS providers to grow their reach and revenue. As organisations transition from legacy PSTN to the cloud, there is potential to create integrated, global services that elevate communications beyond traditional infrastructure.

By deploying cloud voice services, businesses can secure additional revenue streams and drive expansion into new markets where previous infrastructure could not reach. Moving to a consolidated global network also allows providers to bypass the high cost of building their own infrastructure, while removing the complexity of managing multiple local carriers.

With automated, on-demand provisioning, providers can scale their offerings quickly and meet the needs of an increasingly international customer base. Modernising your voice strategy ensures a more efficient operating model and a stronger competitive position in an AI-ready marketplace.

Speak to Epsilon's voice experts to explore how carrier-grade voice services can help grow your reach and revenue.

Interconnecting Your World: **20+ Years of Voice Experience**

Epsilon Telecommunications is a leading global software-defined network provider, delivering a comprehensive suite of end-to-end connectivity and communication solutions, including voice, to some of the world's largest carriers and enterprises.

Powered by Infiny, our award-winning Network-as-a-Service (NaaS) platform, you can unlock the full capabilities of Epsilon's global Voice and SMS solutions and redefine how you connect. Combined with our high-performance, far-reaching global network spanning Europe, the Middle East, the United States, and Asia, Infiny enables seamless voice, greater agility, and true global reach – helping you interconnect your digital world with confidence.

Ready to discuss Voice?

[Talk to an Expert →](#)

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