

INFOTRACK FOR ENTERPRISE COMMUNICATIONS FOURTH QUARTER 2003 REPORT



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InfoTrack For Enterprise Communications is an on-going program of PBX, IP-PBX, Key/Hybrid, Centrex, Voice Messaging, and Call Center market analysis, consisting of the following deliverables:

- InfoTrack Reports -- Comprehensive Report Updated and Delivered Quarterly
- InfoTrack Quarterly Executive Summary
- InfoTrack Call-In -- Continuous Expert Client Support
- InfoTrack Briefing -- Executive Briefings to Management

For any questions or requests, please contact the following at 973/884-0100:

<i>Barry Marks</i>	--	<i>InfoTrack Client Officer</i>
<i>Frank Stinson</i>	--	<i>InfoTrack Program Director</i>

Other InfoTrack Contributors include:

<i>Scott Drobner</i>	--	<i>Enterprise Wireless</i>
<i>Bob Olson</i>	--	<i>Network Services; IP Telephony</i>
<i>Mark Ricca</i>	--	<i>Enterprise Consulting</i>
<i>Eric Schmiedeke</i>	--	<i>Strategic Analysis; Executive Briefing</i>
<i>Terry White</i>	--	<i>CTI; IP Telephony</i>
<i>Warren Williams</i>	--	<i>Professional Services</i>

◆ Data, analysis, and forecasts presented in this report were developed through the following methodology:

- Comprehensive, Quarterly Surveys of All Manufacturers/Vendors
 - 12 PBX Manufacturers
 - 13 IP-PBX Manufacturers
 - 30 Applications/Adjunct Solutions Providers
 - 15 Key Telephone/Hybrid Manufacturers
 - 7 Centrex Providers
- Government Business Demographic and Econometric Databases/Resources
- InfoTech Forecast Models
- InfoTech Regional Opportunity Identification and Segmentation Models
- InfoTech's On-Going Price Tracking Studies and Models
- InfoTech's On-Going Services/Maintenance Studies and Models
- InfoTech's On-Going Research and Analysis of Emerging Markets: Wireless, CTI, Unified Messaging

◆ In deriving estimates of PBX installed base segmentation, InfoTech utilizes proprietary site record statistics gained from ongoing market research activities and projects.

◆ All data reflects activity in the continental United States only unless otherwise noted. Statistics for the Canadian marketplace are presented in Section 10.

- ◆ Regional segmentations of the data correspond to the same state territories defined as RBOC regions, as detailed below

Northeast	-	CT, MA, ME, NH, NY, RI, VT
Mid-Atlantic	-	DC, DE, MD, NJ, PA, VA, WV
Southeast	-	AL, FL, GA, KY, LA, MS, NC, SC, TN
Central	-	IL, IN, MI, OH, WI
Southwest	-	AR, KS, MO, OK, TX
West	-	AZ, CO, ID, IA, MN, MT, NE, NM, ND, OR, SD, UT, WA, WY
Pacific	-	CA, NV

- ◆ All shipment data is reflective of new equipment (not used or refurbished) unless otherwise indicated.
- ◆ All shipment data reflects shipments from the factory during the stated period.
- ◆ All PBX installed base and shipment line estimates reflect equipped for capacity, the station port capacity of line cards included in systems at the time of installation. Add-on line shipments for PBXs reflect expansions to existing systems.
- ◆ The following categories of shipments are included in InfoTrack. All manufacturers reporting this information are consistent in this regard.

<u>Category</u>	<u>Included in InfoTrack</u>
- Current Product Line	Yes
- Supported Products	Yes
- Manufacturer Discontinued	Yes
- Manufacturer Refurbished Line Cards	No
- Hardware Upgrades – Existing Cards/Licenses Retained	No
- Software Upgrades - Existing Cards/Licenses Retained	No
- System Upgrades – Incremental Licenses/Replacement Cards	Yes

- ◆ Key/Hybrid station shipments represent equipped for station ports.
- ◆ Any historical data not contained in the document can be provided upon request.

InfoTrack for Enterprise Communications Switch Classifications			
Vendor	PBX	Key/Hybrid	IP-PBX
Alcatel			Omni PCX Enterprise
Altigen			AltiServ
Avaya Communication	Definity G3, Prologix	Partner, Spirit, Merlin, Merlin Legend/Magix	IP-Office, MultiVantage
Cisco			CallManager, CallManager Express
Comdial		DSU II, DXP, DXP Plus, FXT, FXS	FXII
ECI Telecom	Coral I, II, III	Coral SL	
eOn Communications	Millenium		
Ericsson	Consono MD110		
Hitachi	HCX5000		
Intecom	Intecom E		
Inter-Tel		Axxent, Axxess	
Iwatsu		ADIX APS, ADIX-VS	
Mitel	SX-200ML, SX-200, SX-2000ML, SX-2000		3050, 3100, 3300, 3340
NEC	NEAX 1000, 2000, 2400	Electra Elite, InfoSet 408	NEAX 2000 IPS, 2400 IPX
Nortel	All Meridian Options	All Norstar Systems	BCM, Meridian ITG, Succession CSE
Panasonic Co.		KXT	
Panasonic Comm.		DBS	
Samsung		DCS, DCS 50SI, 400SI, Compact	
Shoreline Teleworks			CrystalLAN
Siemens	Hicom 150E, 300E		HiPath 3000, 4000, 5000
Sphere			Spherically
Telrad		Digital 8/18, S-60, 128, 400, 1000	
3Com			NBX 100, Superstack NBX
Toshiba		DK14, CTX100, CTX670	CS Server
Vertical Networks			InstantOffice

- ◆ InfoTrack currently tracks the IP-Telephony market on the station side, utilizing the 3 segments listed below
- ◆ Telephony-Enabled LAN represents a solution where all internal voice traffic is routed on a LAN/WAN and packet-switched via server-based call management software.
- ◆ IP-Enabled PBX represents a traditional PBX that has been equipped with station-side IP gateway card(s) allowing IP phones to operate within a TDM switching fabric
- ◆ Converged Systems are packet-switched systems that can be enabled to support legacy digital line cards and terminals. Shipment results include any combination of IP, digital, and analog phones connected in a single system.
- ◆ Depending on the individual vendor's solution, software licenses, line cards, and/or IP telephones shipped are used as a proxy for equipped for capacity.
- ◆ The size segments used to track this market are the same as those used for the traditional PBX market: 2-40, 41-100, 101-400, 401-1000, 1001-4000, and 4000+
- ◆ Voice Messaging shipments are stated in terms of equipped for port capacity at the time of system installation.
- ◆ ACD shipments are stated in terms of equipped agents at the time of system installation. Upgrades or enhanced feature packages sold into existing ACD systems from the same manufacturer are not included unless they represent an expansion in system size, in which case only incremental agents would be counted.

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