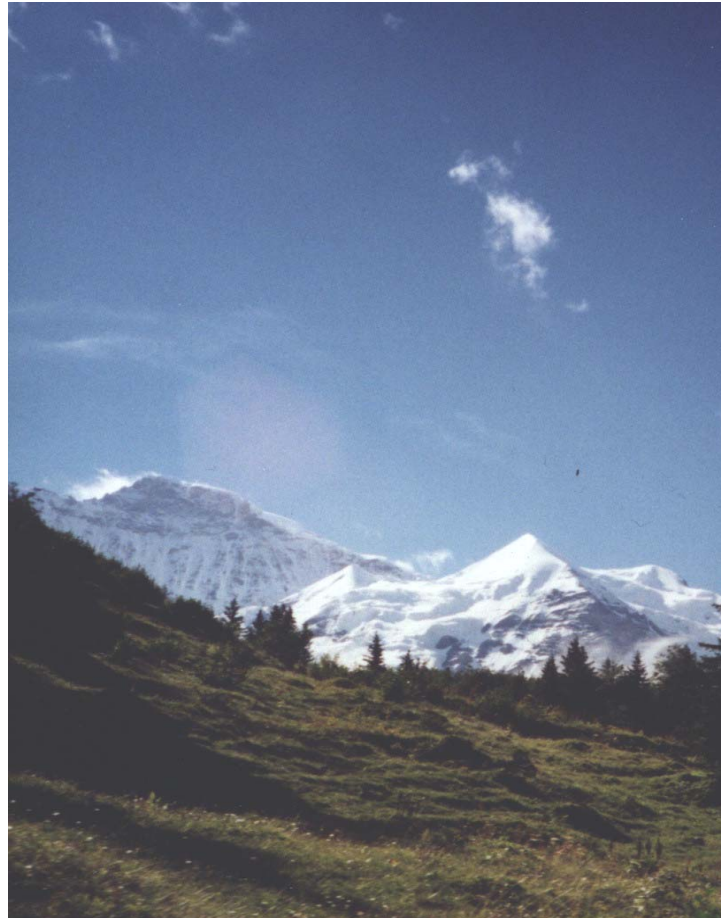


**SIP Enabled Servers and IP PBX Market Shares, Strategies,
and Forecasts, 2008 to 2014**

SIP Enabled Infrastructure Implements VoIP



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

WinterGreen Research, Inc.

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Lexington, Massachusetts

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CHECK OUT THESE KEY TOPICS

ENTERPRISE VOICE SYSTEMS

DIGITAL VIDEO SERVERS

IP PBX

SESSION INITIATION PROTOCOL

SIP MARKET SHARES

SIP Market Forecasts

SIP Enabled Servers

SIP IP PBX Server Products

SIP Application Server

Automated Attendant

Call Service Controller

Instant Messaging (IM)

Voice

Video

Collaboration

Workflow

INTELLIGENT CALL ROUTING

RUNTIME PLATFORM

IP COMMUNICATIONS PLATFORM

SIP TECHNOLOGY

VOIP ENTERPRISE EQUIPMENT

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.

Lexington, Massachusetts

www.wintergreenresearch.com

SIP Enabled Servers and IP PBX Market Strategies, Market Shares, and Market Forecasts, 2008-2014

SIP based IP PBX markets are poised for significant growth as people move to purchase IP based servers for communications. Significant pent up demand will be converted to sales as systems are put on the market that permit implementation of voice over IP that works. Voice over IP systems purchases have been postponed for ten years or more, waiting for technology that works. VoIP technology finally works.

Technology transition relates to growth strategy that relies heavily on capturing a significant share of the spending by enterprises on their transition of technology from traditional communications systems to IP communications. IP communications has gained widespread acceptance in the marketplace and over time. The demand is continuing to increase as the industry goes through the mainstream adoption phase in the product lifecycle.

Half of all lines currently being shipped are IP rather than traditional, or TDM. As a result of the technology transition, spending by enterprises on traditional voice communication systems has been declining. Increases in product revenue are attributable to sales of IP telephony systems. They continue to be offset in part by declines in product revenue attributable to traditional voice communication systems.

Pressures on services business are due to advances in technology. Customers continue to expect traditional services to be at lower prices to them. Customers routinely look for opportunities to reduce their information technology and related costs.

A high correlation exists with respect to customers in direct channel who purchase products also electing to purchase maintenance contracts at the time of the product purchase. At the time of contract renewal, maintenance and managed services revenues have been affected by reductions in scope of contracted services.

Digital Private Branch Exchange (PBX) At the End of Its Life Cycle

The digital private branch exchange (PBX) has reached the end of its life cycle. The private branch exchange (PBX) has been a component of enterprise voice networks. The PBX facilitates local in-company dialing, local calls outside the premises, and long distance calls.

It was a proprietary hardware box that has been replaced by a combination of software from the traditional PBX vendors and computer industry standard blade servers that host the unified communications software. Systems work on the Internet, using SIP base protocols to provide session set up and call connections.

PBX systems that were meant to last 5 or 6 years have been in place twice that long, waiting for the new Internet based communications technology to arrive. It has. PBX vendors are selling software the sits on Linux blade servers from the computing industry.

With an IP-PBX, the local area network the platform is for connecting smart IP phones logically over a shared packet network to the call manager. This unifies the data applications and the voice network, but places demands on the packet prioritization aspects of the LAN infrastructure to ensure user satisfaction with the quality of audio. Power to the IP phone is provided via the standard power brick-style transformer or via Power over Ethernet using the IEEE 802.3af standard.

SIP PBX / IP PBX markets are going from \$14 billion in 2007 to \$40 billion by 2014. IP-PBX shipments completely replace traditional PBX systems. IP-PBX shipments are related to traditional PBX shipments. The trend represented by this shipment data can be traced to IP-PBX architecture that allows businesses to reduce infrastructure cost while improving productivity.

Companies Profiled

Market Leaders

Avaya
Aastra Technologies
Alcatel Lucent
Mitel
Mitel
NEC
Nokia-Siemens
Nortel
Shoretel

Market Participants

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3Com
3CX
Acme Packet
Aastra
Acme Packet
Alcatel Lucent
AltiGen Communications
Atlas Telecom
Brekeke Software
Cisco
Comverse
IP Communications to Deliver Hosted Business Services
Dialogic
Epygi Technologies
Fonality
Google
Huawei
Enterprise Data Networking
iFone S.A. de C.V.
iFone
Interactive Intelligence
Juma Technology
Microsoft
NET Equipment Technologies
NextPoint
Samsung
Siemens
Sierra Merger Corp / Avaya
Taridium
Tekelec
Toshiba
Vertical Communications
XO Communications
Vertical Communications
Voiceserve
VoipSwitch Inc

SIP Enabled Servers and IP PBX Market Shares, Strategies, and Forecasts, 2008-2014

REPORT METHODOLOGY

THIS IS THE 356TH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. THE PROJECT LEADERS TAKE DIRECT RESPONSIBILITY FOR WRITING AND PREPARING EACH REPORT. THEY HAVE SIGNIFICANT EXPERIENCE PREPARING INDUSTRY STUDIES. FORECASTS ARE BASED ON PRIMARY RESEARCH AND PROPRIETARY DATA BASES. FORECASTS REFLECT ANALYSIS OF THE MARKET TRENDS IN THE SEGMENT AND RELATED SEGMENTS. UNIT AND DOLLAR SHIPMENTS ARE ANALYZED THROUGH CONSIDERATION OF DOLLAR VOLUME OF EACH MARKET PARTICIPATION IN THE SEGMENT. INSTALLED BASE ANALYSIS AND UNIT ANALYSIS IS BASED ON INTERVIEWS AND AN INFORMATION SEARCH. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, OPINION LEADERS, AND COMPANIES SEEKING TO DEVELOP MEASURABLE MARKET SHARE. OVER 200 IN DEPTH INTERVIEWS ARE CONDUCTED FOR EACH REPORT WITH A BROAD RANGE OF KEY PARTICIPANTS AND INDUSTRY LEADERS IN THE MARKET SEGMENT. WE ESTABLISH ACCURATE MARKET FORECASTS BASED ON ECONOMIC AND MARKET CONDITIONS AS A BASE. USE INPUT/OUTPUT RATIOS, FLOW CHARTS, AND OTHER ECONOMIC METHODS TO QUANTIFY DATA. USE IN-HOUSE ANALYSTS WHO MEET STRINGENT QUALITY STANDARDS. INTERVIEWING KEY INDUSTRY PARTICIPANTS, EXPERTS AND END-USERS. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

Mission Statement:

WinterGreen Research is an independent business research organization funded by sale of market research, competitive analysis, and return on investment studies all over the world. Research is conducted with integrity and independence that is supported by the revenue from the sale of studies by a distribution network. The company seeks to support its distribution network. The company is dedicated to its customers, to helping those customers grow and understand markets as the markets change and evolve. Automation of process is a central focus for the WinterGreen Research company.

Research is centered on new markets, evolving markets, and change in markets. Markets for new products depend on successful trials. Initial trials create a sounding board for a new product direction. Market growth for new products and services depends on completion of 100 successful trials with real paying customers. WinterGreen Research tracks those trials in various industries and the impact of the trials by talking to people.

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YOU MUST HAVE THIS STUDY

SIP Enabled Servers and IP PBX Market Shares, Strategies, and Forecasts, 2008 to 2014

Table of Contents

SIP ENABLED SERVERS AND IP PBX EXECUTIVE SUMMARY

SIP ENABLED PBX AND IP PBX MARKET SHARES AND FORECASTS	ES-1
SIP PBX and IP PBX Markets	ES-1
Software Based IP PBX	ES-2
SIP PBX and IP PBX Markets	ES-2
Digital Private Branch Exchange (PBX) At the End of Its Life Cycle	ES-3
Digital Private Branch Exchange (PBX) At the End of Its Life Cycle	ES-3
SIP PBX / IP PBX Market Shares	ES-6
2.1.1 SIP Based IP PBX Softwares	ES-11
SIP Enabled Servers and IP PBX Market Forecasts	ES-11
SIP PBX / IP PBX Market Forecasts	ES-12

SIP ENABLED SERVERS AND IP PBX MARKET DESCRIPTION AND MARKET DYNAMICS

1. SIP ENABLED SERVERS AND IP PBX MARKET DESCRIPTION AND MARKET DYNAMICS	1-1
1.1 SIP-PBX Deployment	1-1
1.1.1 Telephone First Point Of Contact	1-2
1.1.2 SIP Application Server	1-3
1.2 Convergence of Voice and Data	1-6
1.3 Enterprise PBX	1-7
1.4 Session Initiation Protocol (SIP) Standard	1-9
1.4.1 SIP Advantages and Applications	1-10
1.4.2 SIP Part of IP Suite	1-10
1.4.3 Session Initiation Protocol	1-11
1.4.4 SIP Mobility and Presence Support	1-12
1.5 SIP Application Server	1-13
1.6 Software Based IP PBX	1-21

SIP ENABLED SERVERS AND IP PBX MARKET SHARES AND MARKET FORECASTS

2. SIP ENABLED PBX AND IP PBX MARKET SHARES AND FORECASTS	2-1
2.1 SIP PBX and IP PBX Markets	2-1
2.1.1 Digital Private Branch Exchange (PBX) At the End of Its Life Cycle	2-1
2.1.2 IP Signals Improved Business Communication	2-2
2.1.3 SIP IP Protocol Enables Unified Communications	2-3
2.2 SIP PBX / IP PBX Market Shares	2-5
2.2.1 VoIP Users	2-13
2.2.2 Avaya2-15	

REPORT # SH29821662 535 PAGES 155 TABLES AND FIGURES 2008 \$3,300

2.2.3	Cisco 2-18	
2.2.4	Alcatel Lucent	2-18
2.2.5	Nokia Siemens HSPA Network	2-19
2.2.6	NEC 2-19	
2.2.7	3Com 2-20	
2.2.8	Aastra Ericsson Technologies Revenue	2-20
2.2.9	AltiGen	2-22
2.2.10	Worldwide Large Enterprise SIP Enabled Server and IP PBX	2-23
2.2.11	Worldwide Mid Size Business SIP Enabled Server and IP PBX	2-25
2.2.12	Worldwide Small Business SIP Enabled Server and IP PBX	2-27
2.3	SIP Based Servers and IP PBX Forecasts	2-29
2.3.1	Aastra2-29	
2.3.2	SIP PBX / IP PBX Market Forecasts	2-31
2.3.3	Large Enterprise SIP Server Market Forecasts	2-36
2.3.4	Mid Size Business SIP Server Market Forecasts	2-40
2.3.5	Small Business SIP Server Market Forecasts	2-43
2.4	Selected IP PBX and SIP PBX Pricing	2-46
2.4.1	Toshiba Pricing and Availability	2-47
2.5	SIP Servers	2-48
2.5.1	SIP Server Market Shares	2-48
2.5.2	SIP Server Market Forecasts	2-51
2.6	SIP Enabled Servers and IP PBX Regional Analysis	2-53
2.6.1	SIP Servers and IP PBX Regional Segment Analysis	2-56
2.6.2	Japan 2-56	
2.6.3	IP PBX Market In Japan	2-56
2.6.4	Korea 2-58	
2.6.5	China 2-59	
2.6.6	Alcatel – Lucent Revenue by Region and Business Group	2-64
2.6.7	Siemens Nokia	2-64
2.6.8	Mitel Regional Market Segments	2-65
2.6.9	Tekelec Revenue By Region	2-66

SIP ENABLED SERVERS AND IP PBX DESCRIPTION

3. SIP ENABLED SERVERS AND IP PBX PRODUCT DESCRIPTION	3-1
3.1 SIP IP PBX Server Products	3-1
3.2 Avaya SIP Application Server	3-1
3.2.1 Avaya Communication Manager - SIP Center PBX	3-2
3.2.2 Avaya Intelligent SIP Based Applications for the Enterprise	3-3
3.2.3 Avaya SIP SOA	3-5
3.2.4 Pre-Built Applications From Avaya	3-6
3.2.5 Avaya Third Party SIP Application Development	
Partner Inova IT	3-8
3.2.6 Avaya Partner CGI, SIP Based Web Application	3-9
3.2.7 Avaya SIP Application Server (SIP A/S)	3-12
3.2.8 Avaya G860 Media Gateway	3-16
3.2.9 Avaya Communication Manager Flagship IP	
Telephony Software Platform	3-21
3.2.10 Avaya Small to Mid Size Business Servers	3-24
3.3 Nortel	3-28
3.3.1 Nortel Telephony Solutions for Small & Medium Business	3-33
3.3.2 Nortel In-Building Mobile Telephony Solutions	3-34
3.3.3 Nortel CallPilot Unified Messaging	3-35
3.3.4 Norstar Integrated Communications Systems	3-35
3.3.5 Nortel Simplifies Communication and Business Processes –	3-36

3.4	Alcatel Lucent Enterprise Communications	3-37
3.4.1	Alcatel-Lucent OmniTouch Unified Communication Features	3-39
3.4.2	Alcatel-Lucent Extended Communication Server	3-43
3.4.3	Alcatel-Lucent OmniPCX Office	3-44
3.4.4	Alcatel-Lucent OmniPCX Enterprise	3-44
3.4.5	Alcatel-Lucent Videoconferencing	3-45
3.5	Cisco 3-45	
3.5.1	Cisco Unity® IP Media Gateway	3-45
3.5.2	Cisco Unity PIMG and TIMG Architecture	
	Key Features and Benefits	3-46
3.5.3	Cisco Digital Connectivity	3-46
3.5.4	Cisco T1 Connectivity	3-46
3.5.5	Cisco Unity Failover Support	3-47
3.5.6	Deployment Across a WAN	3-47
3.5.7	Cisco PIMG Branch-Office Consolidation	3-48
3.5.8	Cisco Speech Connect Feature	3-50
3.5.9	Cisco Unified Workspace	3-50
3.5.10	Cisco Voice Network Solution	3-51
3.5.11	Cisco Unity® Unified Messaging	3-53
3.5.12	Voice Traffic Cisco Security Features	3-54
3.5.13	Cisco Voice Over IP Return on Investment	3-55
3.5.14	Cisco Unified Communication	3-57
3.6	Siemens Hi-Path MobileConnect SIP PBX	3-58
3.6.1	Siemens' HiPath 8000 SIP-Based Communications Platform	3-59
3.6.2	Siemens Enterprise Communications PBX Features	3-63
3.6.3	Siemens Enterprise Communications Open Architecture	3-64
3.6.4	Nokia Siemens Flexi Platform And I-HSPA Architecture	3-69
3.6.5	Nokia Siemens Networks Pioneer In I-HSPA	3-70
3.6.6	Nokia Siemens System Network Security	
	Preventing Unauthorized Access	3-70
3.6.7	Siemens' "MobileConnect" Dual-mode Devices Facilities	3-72
3.7	Huawei / 3COM	3-75
3.7.1	Huawei 3Com Session Initiation Protocol (SIP)-based VCX system	3-77
3.8	NEC's Univerge	3-84
3.8.1	NEC Univerge NEAX 2400 IPX	3-84
3.8.2	NEC Univerge NEAX 2000 IPS	3-85
3.8.3	NEC Univerge NEAX IPS-DMR	3-85
3.8.4	NEC Univerge NEAX IPS-DML	3-85
3.8.5	NEC Communications IBM Presence Collaboration	3-88
3.8.6	NEC Enhances its UC Portfolio with Support for Microsoft's Unified Communications Software	3-90
3.8.7	NEC-Basic Media Gateway	3-92
3.8.8	NEC -USB Handset (UTR-UC-1)	3-92
3.8.9	NEC Service Convergence Integrated Platform	3-92
3.8.10	NEC SCI Platform Realizing Carrier-Class Quality, Leverages Blade-Server Architecture, Bundles A SIP Server	3-93
3.8.11	NEC Technology to Prevent IP Phone SPAM	3-97
3.9	Toshiba	3-98
3.9.1	Toshiba America Information Systems Telecommunication SmartPhone	3-101
3.10	AltiGen	3-103
3.10.1	One AltiGen System Covers Multiple Locations	3-106
3.10.2	AltiWare	3-107
3.10.3	AltiContact Manager	3-107
3.10.4	AltiTouch 510	3-108
3.10.5	AltiGen IP710 Voice over IP Telephone	3-108
3.10.6	AltiGen Hardware and Firmware	3-108

3.10.7	AltiGen Modular Software	3-109
3.11	Aastra / Ericsson	3-111
3.11.1	Aastra IP PBX	3-112
3.11.2	Aastra / Ericsson MXOne	3-113
3.12	Mitel	3-116
3.12.1	Mitel 3300 IP Communications Platform (ICP)	3-116
3.12.2	Mitel 3300 IP Communications Platform (10 to 65,000 users)	3-117
3.12.3	Mitel Enterprise Manager Suite	3-121
3.12.4	Mitel 3600 Hosted Key System	3-122
3.13	Oki	3-122
3.14	Hewlett Packard	3-123
3.14.1	Alcatel-Lucent and HP Integrate SOA Security And Governance Tools	3-123
3.15	IBM / Apsoft	3-124
3.16	Epygi IP PBX	3-125
3.17	Shoretel	3-128
3.17.1	ShoreTel / IBM Unified Communications Collaboration Partnership	3-132
3.18	Acme Packet	3-134
3.19	Metaswitch SIP Provisioning Server and Phone Configurator	3-135
3.20	NextPoint & Juma Technology / Nectar Partner to Bring Integrated IP-PBX and SIP Trunking Solutions	3-136
3.21	Tekelec	3-140
3.22	Dialogic Multimedia Software	3-140
3.22.1	Dialogic Integrated Media Gateway	3-144
3.22.2	Dialogic® IP Media Server	3-145
3.22.3	Dialogic® IP Media Server Features and Benefits	3-150
3.23	Vertical	3-152
3.24	Samsung	3-152
3.25	Digium / Switchvox	3-155
3.26	Oki	3-158
3.26.1	Implementing PSTN/ISDN Simulation Over NGN	3-161
3.26.2	Support For ISC Interfaces	3-161
3.27	3CX Phone System	3-161
3.27.1	Key Advantages Of The 3CX Tunnel	3-162
3.28	3CX Phone System for Windows v5	3-164
3.29	Taridium	3-166
3.30	Aztech	3-167
3.31	Suncomm Technology	3-169
3.32	Roytel Technology	3-170
3.33	Atcom Technology	3-171
3.34	SeaWolf	3-172
3.35	First Communication	3-174
3.36	DSG Technology	3-174
3.37	Suncomm	3-175
3.38	FCI	3-178
3.39	Diyixian / Zultys	3-178
3.40	Network Equipment Technologies (NET)	3-181
3.40.1	NET VX Series Voice Exchange Platform	3-182
3.41	Atlas Telecom	3-183
3.42	Google Domains Product	3-186
3.43	Fonality Trixbox	3-186
3.44	Brekeke Software	3-187
3.45	More SIP IP PBX Server Products	3-188

SIP ENABLED SERVERS AND IP PBX TECHNOLOGY

4. SIP ENABLED SERVERS AND IP PBX TECHNOLOGY	4-1
4.1 SIP Integration With IP And Rich Media Applications	4-1
4.1.1 Standards Based Signaling Technology Session Initiation Protocol (SIP).	4-1
4.1.2 SIP Presence	4-4
4.1.3 SIP Actions	4-4
4.1.4 SIP Helps Sales	4-5
4.1.5 SIP Trunks & Benefits	4-5
4.1.6 SIP Reduction In The Cost Of Networking	4-5
4.2 SIP PBXs' Based On Linux	4-10
4.3 Cisco SIP	4-11
4.3.1 Cisco Unified Communication System	4-11
4.4 VoIP Gateways	4-12
4.5 Avaya SIP Trunking Incoming Calls Are Proxied Through The PID	4-14
4.6 Bluenote	4-15
4.6.1 SOA Product Strategy At BlueNote Networks	4-16
4.6.2 SOA Representational State Transfer Is A Mode Of Communication Accessible To Programs And Humans	4-17
4.7 Enterprise Communications ROI	4-17
4.8 Femto Cell Base Station FMC Services	4-19
4.8.1 Session Border Controller (SBC)	4-23
4.8.2 SPIT Attack Simulation Project	4-23
4.9 High-Availability And High-Performance Solution	4-24

SIP ENABLED SERVERS AND IP PBX COMPANY PROFILES

5. SIP BASED PBX AND IP PBX COMPANY PROFILES	5-1
5.1 Activity Among Enterprise Equipment Providers	5-1
5.2 3Com	5-2
5.2.1 3Com / H3C Technologies	5-2
5.2.2 3Com TippingPoint Division	5-2
5.2.3 3Com Acquired by Bain Capital Partners	5-2
5.2.4 Huawei Acquired A Minority Interest In 3Com	5-3
5.2.5 3Com Commercial Investment For Huawei	5-3
5.2.6 Ownership Of China-Based Joint Venture, H3C Technologies	5-4
5.2.7 3Com Customers	5-4
5.2.8 3Com Third Quarter Fiscal Year 2008 Revenue	5-5
5.2.9 3 Com Channel Model	5-5
5.3 3CX	5-6
5.4 Acme Packet	5-6
5.5 Aastra	5-7
5.5.1 Aastra Technologies Revenue	5-8
5.5.2 Aastra Fourth Quarter 2007 Financial Revenue	5-10
5.6 Acme Packet	5-11
5.6.1 Acme Packet Revenue	5-12
5.7 Alcatel Lucent	5-12
5.7.1 Alcatel - Lucent Revenue by Region and Business Group	5-13
5.7.2 Alcatel--Lucent and NEC	5-14
5.7.3 Rationale for LTE Joint Venture Combining	5-15
5.8 AltiGen Communications	5-16
5.8.1 AltiGen Communications Extends Business VoIP Reach with Latin America Region Market Growth	5-17

5.8.2	AltiGen Communications	5-19
5.8.3	AltiGen Communications Revenue	5-21
5.9	Atlas Telecom	5-23
5.10	Brekeke Software	5-24
5.11	Cisco	5-25
5.11.1	Cisco Net Sales:	5-26
5.11.2	BT and Cisco VoIP Connectivity To Cambridge University Users	5-28
5.11.3	Cisco SMB	5-29
5.12	Converse	5-30
5.12.1	Converse Converged IP Communications	5-30
5.12.2	T-Systems in Italy Leverages Converse Converged IP Communications to Deliver Hosted Business Services	5-30
5.13	Dialogic	5-31
5.13.1	Dialogic Worldwide Presence	5-32
5.13.2	Dialogic Innovation	5-32
5.13.3	Dialogic Network Service Provider Products	5-32
5.13.4	Dialogic Enterprise Products	5-33
5.13.5	Dialogic Partners	5-34
5.14	Epygi Technologies	5-36
5.15	Fonality	5-36
5.16	Google	5-37
5.17	Huawei	5-37
5.17.1	Huawei Next Generation Telecommunications Networks	5-38
5.17.2	Huawei Strategy	5-39
5.17.3	Huawei Partners	5-39
5.17.4	Huawei Global Operations	5-39
5.17.5	Huawei Financials	5-40
5.17.6	Huawei Files 26,880 Patent Applications	5-41
5.17.7	Huawei Standards & Patents	5-42
5.17.8	Huawei Core Technology Systems Architecture	5-44
5.17.9	Huawei Products	5-45
5.17.10	Huawei Key Partnerships	5-47
5.17.11	Huawei Technologies and 3Com Focus on Enterprise Data Networking	5-47
5.18	iFone S.A. de C.V.	5-48
5.19	iFone	5-51
5.20	Interactive Intelligence	5-52
5.20.1	Interactive Intelligence Convergence of Voice and Data	5-55
5.20.2	Interactive Intelligence Revenue	5-55
5.21	Juma Technology	5-57
5.21.1	Juma Technology Business Model	5-61
5.22	Microsoft	5-63
5.23	Mitel	5-64
5.23.1	Mitel – U.S. Region	5-66
5.23.2	Mitel Managed Services Portfolio	5-67
5.23.3	Mitel Managed Services Program	5-67
5.23.4	Mitel Messaging	5-69
5.23.5	Mitel Strategic Partners	5-70
5.23.6	Inter-Tel / Mitel	5-71
5.23.7	Mitel Dutch Government Contract for Massive IP Deployment	5-74
5.23.8	Mitel Customer Base	5-74
5.24	NEC	5-75
5.24.1	NEC Corporation of America	5-79
5.24.2	Alcatel--Lucent and NEC	5-80
5.24.3	NEC Communications IBM Presence Collaboration	5-80
5.24.4	NEC and Microsoft	5-82

5.25	NET Equipment Technologies	5-83
5.25.1	NET Acquires Quintum	5-83
5.25.2	Network Equipment Technologies Revenue For 3rd Quarter Of Fiscal 2008	5-83
5.25.3	Network Equipment Technologies VX1800 Voice Exchange for Unified Communications	5-84
5.25.4	Network Equipment Technologies Next Generation Intelligent Media Gateway / Quintum® Total Care Package For Microsoft	5-88
5.25.5	Network Equipment Technologies / Quintum	5-90
5.26	NextPoint	5-91
5.26.1	NextPoint Networks Global, Fixed-Mobile Convergence	5-92
5.27	Nokia-Siemens	5-95
5.27.1	Strategy	5-95
5.27.2	Financials	5-96
5.27.3	Customers	5-97
5.27.4	Partners	5-98
5.27.5	Nokia Mobile Communications	5-98
5.27.6	Siemens AG	5-98
5.27.7	Siemens Networks LLC	5-101
5.27.8	Siemens	5-102
5.28	Nortel	5-103
5.29	Samsung	5-109
5.29.1	Samsung Strategy	5-110
5.29.2	Samsung Electronics Financials	5-111
5.29.3	Samsung Partners	5-112
5.29.4	Samsung Information Technology Division (ITD)	5-112
5.29.5	Samsung Electronics Global Leader	5-113
5.30	Shoretel	5-113
5.30.1	ShoreTel Revenue for Second Fiscal Quarter 2008	5-114
5.30.2	ShoreTel Products	5-115
5.30.3	ShoreTel Partnerships	5-116
5.30.4	ShoreTel Business Outlook	5-116
5.31	Siemens	5-117
5.31.1	Siemens Enterprise Communications	5-117
5.31.2	Nokia Siemens Combined Reputation And Market Scale	5-120
5.32	Sierra Merger Corp / Avaya	5-120
5.32.1	Avaya / Silver Lake	5-121
5.32.2	Avaya Acquisition Of Ubiquity Software	5-121
5.32.3	Avaya Customer Base	5-122
5.32.4	Avaya Revenues	5-125
5.32.5	Avaya Revenue	5-127
5.32.6	Avaya Global Communications Solutions (“GCS”)	5-128
5.32.7	Avaya Fourth Quarter and Fiscal Year 2007 Revenue	5-131
5.32.8	Avaya Fiscal Year 2007 Results	5-131
5.32.9	Silver Lake Partners and TPG Capital Acquisition of Avaya	5-132
5.32.10	Avaya Global Services (“AGS”)	5-134
5.32.11	Avaya Fiscal Year 2007 Results	5-142
5.32.12	Acquisition of Avaya	5-142
5.33	Taridium	5-150
5.34	Tekelec	5-152
5.34.1	Tekelec Supports T-Mobile Signaling Network	5-152
5.34.2	Tekelec Posts Q4 Orders of \$186 Million	5-153
5.35	Toshiba	5-153
5.35.1	Toshiba Revenue	5-154
5.35.2	Toshiba America Information Systems Strata® CIX™ SIP Trunking Capabilities IP Business Communication Systems	5-154

5.35.3	Toshiba Strata MicroMAS	5-157
5.35.4	Toshiba, A World Leader In High Technology	5-158
5.36	Vertical Communications	5-159
5.37	XO Communications	5-160
5.38	Vertical Communications	5-161
5.39	Voiceserve	5-162
5.40	VoipSwitch Inc	5-162

List of Tables and Figures

SIP ENABLED SERVERS AND IP PBX ENGINE EXECUTIVE SUMMARY

Table ES-1	SIP based Unified Communications Market Driving Forces	ES-5
Table ES-2	Worldwide SIP Enabled PBX / IP PBX Shipments	ES-8
Figure ES-3	Worldwide Total SIP Enabled Server and IP PBX Market Forecasts, Dollars, Shipments, 2008-2014	ES-12

SIP ENABLED SERVERS AND IP PBX ENGINE MARKET DESCRIPTION AND MARKET DYNAMICS

Table 1-1	SIP Application Server Business Benefits	1-14
Table 1-2	SIP Server-Based Applications	1-16
Table 1-3	SIP Server-Based Benefits	1-17

SIP ENABLED SERVERS AND IP PBX ENGINE MARKET SHARES AND MARKET FORECASTS

Table 2-1	SIP Based Unified Communications Market Driving Forces	2-3
Table 2-1 (Continued)	SIP Based Unified Communications Market Driving Forces	2-4
Table 2-2	Worldwide SIP Enabled PBX / IP PBX Shipments	2-8
Table 2-3	Worldwide SIP Enabled Server and IP PBX Shipments	2-9
Figure 2-4	Worldwide Large Enterprise SIP Enabled Server and IP	2-23

PBX Shipments Market Shares, Dollars, 2007 Table 2-5	2-24
Worldwide Mid Size Business SIP Enabled Server and IP PBX Shipments Market Shares, Dollars, 2007 Table 2-6	2-25
Worldwide Mid Size Business SIP Enabled Server and IP PBX Shipments Market Shares, Dollars, 2007 Table 2-7	26
Worldwide Mid Size Business SIP Enabled Server and IP PBX Shipments Market Shares, Dollars, 2007 Figure 2-8	2-27
Worldwide Small Business SIP Enabled Server and IP PBX Shipments Market Shares, Dollars, 2007 Table 2-9	2-28
Worldwide Small Business SIP Enabled Server and IP PBX Shipments Market Shares, Dollars, 2007 Figure 2-10	2-32
Worldwide Total SIP Enabled Server and IP PBX Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-11	2-33
Worldwide SIP Enabled Server and IP PBX Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-12	2-34
Worldwide Total SIP Enabled Server and IP PBX Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-13	2-35
Worldwide Small and Mid Size Business and Large Enterprise SIP Enabled Server and IP PBX Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-14	2-37
Worldwide Large Enterprise SIP Server Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-15	2-37
Worldwide Large Enterprise SIP Server Market Forecasts, Units, Shipments, 2008-2014 Table 2-16	2-39
Worldwide Large Enterprise SIP Server Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-17	2-40
Worldwide Mid Size Business SIP Server Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-18	2-41
Worldwide Mid Size Business SIP Server Market Forecasts, Units, Shipments, 2008-2014 Figure 2-19	2-42
Worldwide Mid Size Business SIP Server Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-20	2-43
Worldwide Small Business SIP Server Market Forecasts, Dollars, Shipments, 2008-2014 Figure 2-21	2-44
Worldwide Small Business SIP Server Market Forecasts, Dollars, Shipments, 2008-2014	

Figure 2-22	2-45
Worldwide Small Business SIP Server Market Forecasts, Dollars, Shipments, 2008-2014	
Figure 2-23	2-49
Worldwide Total Enterprise SIP Server Shipments Market Forecasts, Dollars, Shipments, 2007	
Figure 2-24	2-50
Worldwide Total Enterprise SIP Server Shipments Market Forecasts, Dollars, Shipments, 2007	
Figure 2-25	2-51
Worldwide Total Enterprise SIP Server Shipments Market Forecasts, Dollars, Shipments, 2007	
Table 2-26	2-52
SIP Server Shipments Market Forecasts, 2007	
Table 2-27	2-53
SIP Enabled Servers and PBX / IP PBX Regional Market Segments, Dollars, 2007	
Table 2-28	2-54
SIP Enabled PBX and IP PBX Regional Shipment Market Shares, Dollars, 2007	
Table 2-29	2-55
SIP Enabled PBX and IP PBX Regional Shipment Market Shares, By Country, Ports, 2007	
Figure 2-30	2-64
Alcatel – Lucent Revenue by Region and Business Group	
Figure 2-31	2-65
Mitel Regional Market Segments	
Figure 2-32	2-66
Tekelec Revenue By Region	

SIP ENABLED SERVERS AND IP PBX ENGINE MIDDLEWARE AND SERVICES DESCRIPTION

Table 3-1	3-4
Avaya Intelligent SIP Based Applications for the Enterprise	
Table 3-2	3-7
Instant Messaging to Voice Conference (IM2 C) Features	
Table 3-3	3-8
Avaya Third Party SIP Application Development Partner Inova IT	
Table 3-4	3-12
Avaya SIP Application Server (SIP A/S) Target Markets	
Table 3-5	3-13
Avaya SIP Application Server (SIP A/S) Features	
Table 3-6	3-14
Avaya SIP Application Server (SIP A/S) Business Benefits	
Table 3-7	3-16
Avaya G860 Media Gateway Business Benefits	
Table 3-8	3-17
Avaya G860 Media Gateway FEATURES	
Table 3-9	3-18
G860 Media Gateway Hardware Platform	

Table 3-10	3-19
Avaya G860 Media Gateway Benefits	
Table 3-11	3-21
Avaya Communication Manager Platform Features	
Table 3-12	3-22
Avaya Communication Manager, Media Gateway, And Server Product Lines	
Table 3-13	3-26
Avaya Media Modules	
Table 3-14	3-27
Avaya Communication Manager Telephony Functions Using End-To-End SIP	
Table 3-15	3-29
Nortel Communication And Application Servers	
Table 3-16	3-30
Nortel Application Server Portfolio Products	
Table 3-16 (Continued)	3-31
Nortel Application Server Portfolio Products	
Table 3-16 (Continued)	3-32
Nortel Application Server Portfolio Products	
Table 3-17	3-36
Nortel SIP PBX Benefits	
Table 3-18	3-37
Alcatel Lucent Enterprise Communications System Benefits	
Table 3-19	3-38
Alcatel Lucent Enterprise Communications System SIP Based Interface	
Table 3-20	3-39
Alcatel-Lucent OmniTouch Open Standards Support	
Table 3-21	3-40
Alcatel-Lucent Enterprise Communications Solutions Positioning	
Table 3-22	3-41
Alcatel-Lucent Enterprise Communications Solutions Functions	
Table 3-22 (Continued)	3-42
Alcatel-Lucent Enterprise Communications Solutions Functions	
Figure 3-23	3-43
Alcatel Lucent Enterprise Communication Servers	
Table 3-24	3-49
Cisco Unity PIMG and TIMG Architecture	
Table 3-25	3-49
Cisco PIMG Branch-Office Consolidation Architecture	
Table 3-26	3-52
Cisco Response To Enterprise Voice Services Business Challenge	
Table 3-27	3-57
Cisco Unified Communication Product List	
Table 3-28	3-60
Siemens HiPath 8000 Platform Features	
Table 3-28 (Continued)	3-61
Siemens HiPath 8000 Platform Features	
Table 3-29	3-62
Siemens HiPath 8000 Platform Functions	
Table 3-30	3-65
HiPath 4000 Features	
Table 3-31	3-66

HiPath 4000 Functions	
Table 3-32	3-67
HiPath 4000 Benefits	
Table 3-33	3-76
Huawei 3Com Convergence Applications Suite Features	
Table 3-34	3-77
Huawei 3Com Convergence Applications Suite Functions	
Table 3-35	3-79
3Com SIP Role in Enterprise IP Telephony	
Figure 3-36	3-80
3Com Asterisk	
Table 3-37	3-81
3Com Sip-PBX Enterprise Communications And Communications-Intensive Applications Functions	
Table 3-38	3-82
Huawei 3Com SIP-PBX Functions	
Table 3-39	3-83
Huawei 3Com SIP-PBX Functions	
Figure 3-40	3-86
NEC NEAX	
Table 3-41	3-87
NEC Univerge Key Features	
Figure 3-42	3-88
NEC Univerge	
Table 3-43	3-94
NEC SCI Platform Main Functions	
Table 3-44	3-96
NEC SIP Server Strategies For Maximizing IT Solutions	
Table 3-45	3-103
Toshiba Communication Systems	
Figure 3-46	3-110
ALtiGen Layered Architectural Structure Benefits	
Figure 3-47	3-110
ALtiGen Meets SMB Requirements	
Table 3-48	3-111
AltiGen Multi Site IP PBX Architecture	
Table 3-49	3-112
Aastra IP PBX Key Telephone Set	
Table 3-50	3-113
Aastra / Ericsson MXOne Benefits Of MX-ONE™	
Table 3-51	3-115
Aastra / Ericsson MXOne MX-ONE™ Features	
Table 3-52	3-118
Mitel3300 ICP Benefits	
Table 3-53	3-119
Mitel 3300 ICP Functions	
Table 3-53 (Continued)	3-120
Mitel 3300 ICP Functions	
Table 3-54	3-121
Mitel PC-Based Administration User Level Devices Supported	
Table 3-55	3-126
Epygi IP PBX Target Markets	

Table 3-56	3-127
Epygi IP PBX Features	
Table 3-57	3-129
ShoreTel IP phone system Components:	
Table 3-58	3-131
ShoreTel Phone System Typical Components	
Figure 3-59	3-134
Acme Packet Session Border Control Architecture	
Table 3-60	3-142
Dialogic Multimedia Platform Uses	
Table 3-61	3-143
Dialogic Video Conferencing Capabilities Of The MMP Software	
Table 3-62	3-145
Dialogic® IP Media Server	
Table 3-63	3-148
Dialogic® IP Server Products	
Figure 3-64	3-154
Samsung Office	
Figure 3-65	3-156
Digium/Switchvox	
Figure 3-66	3-161
OKI Platform	
Table 3-67	3-163
Advantages of 3CX Phone System For Windows:	
Figure 3-68	3-165
3CX Phone System	
Figure 3-69	3-168
Aztech SIP-based IP PBX	
Table 3-70	3-171
Roytel Combined IP PBXs	
Table 3-71	3-173
Seawolf China IP PBX models	
Table 3-72	3-175
Suncomm 504 IP PBX	
Table 3-73	3-176
Suncomm 503 IP PBX	
Table 3-74	3-177
Suncomm IP PBX-516	
Figure 3-75	3-184
Atlas Telecom FAMILY OF IP PBX	
Figure 3-76	3-185
Atlas 204W Wi-Fi Phone	
Figure 3-77	3-185
IP PBX With Key System EASE Of Use For Up To 50 Users	
Table 3-78	3-190
More SIP Server Products	

SIP ENABLED SERVERS AND IP PBX TECHNOLOGY

Table 4-1	4-3
Session Initiation Protocol SIP Benefits	
Table 4-2	4-7
avaya.com SIP Protocols	
Table 4-2 (Continued)	4-8

avaya.com SIP Protocols	
Table 4-3	4-9
Avaya SIP Creates System Flexibility	
Figure 4-4	4-11
Cisco Unified Communication System	
Table 4-5	4-13
Transitioning From Physical To Virtual Contact Centers	
Table 4-5 (Continued)	4-14
Transitioning From Physical To Virtual Contact Centers	
Figure 4-6	4-20
Fixed Mobile Convergence Handset Illustration	

SIP ENABLED SERVERS AND IP PBX COMPANY PROFILES

Figure 5-1	5-14
Alcatel – Lucent Revenue by Region and Business Group	
Figure 5-2	5-17
AltiGen Competitive Positioning	
Table 5-3	5-42
Huawei Standards & Patents	
Table 5-4	5-43
Huawei Key Telecommunications Technologies	
Table 5-5	5-46
Huawei Products	
Table 5-6	5-46
Huawei Solutions	
Figure 5-7	5-49
iFone S.A. of C.V. Leverages Microsoft and AltiGen Partnership	
Figure 5-8	5-50
iFone S.A. of C.V. Products and Services	
Figure 5-9	5-51
iFone Cellular Solutions	
Figure 5-10	5-52
iFone Minuteman Tactical Wireless Suite	
Table 5-11	5-56
Interactive Intelligence Markets	
Table 5-12	5-64
Mitel Broad Range Of Offerings	
Table 5-12 (Continued)	5-65
Mitel Broad Range Of Offerings	
Table 5-13	5-71
Mitel Market Positioning	
Figure 5-14	5-75
NEC Revenue by Segment	
Table 5-15	5-76
NEC Revenue	
Table 5-16	5-76
NEC Revenue By Segment	
Table 5-17	5-77

NEC Mobile / Personal Solutions Revenue By Segment Table 5-18	5-78
NEC IT / NW Revenue By Segment Table 5-19	5-79
NEC Electron Devices Revenue By Segment Table 5-20	5-86
Network Equipment Technologies VX1800 Voice Exchange Enterprise-Class Features Table 5-21	5-87
Network Equipment Technologies VX1800 Voice Exchange Enterprise-Class Expandable Software Modules Features Figure 5-22	5-100
Siemens Addresses Market Shifts for IP PBX Figure 5-23	5-101
Siemens Reorganization Closer to Customer Table 5-24	5-124
Avaya Communication Solutions Platforms Target Markets Table 5-25	5-129
Avaya GCS Segment Products Table 5-25 (Continued)	5-130
Avaya GCS Segment Products Table 5-26	5-156
Strata CIX system Key Product Features And Benefits	

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