

CANADIAN  
PBX MARKET REPORT



2011 EDITION

NBI / MICHAEL SONE  
ASSOCIATES INC.

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# **CANADIAN PBX MARKET REPORT**

## **2011 EDITION**

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## ABOUT THIS REPORT

Examining the period 2009-2013, the **Canadian PBX Market Report, 2011 Edition** describes the Canadian market for key telephone system (KTS), private branch exchange (PBX) and IP private branch exchange (IP-PBX systems) offered by major CPE manufacturers. Detailed quantitative and qualitative information on the leading vendors in Canada — 3Com, Alcatel-Lucent, Avaya, Cisco, Mitel, NEC, Panasonic, Siemens and Toshiba — is the cornerstone of this study. For the first time, the 2011 edition presents a combined view of Avaya's and Nortel's KTS/PBX/IP-PBX businesses following Avaya's acquisition of Nortel's Enterprise Solutions Division in 2009.

At almost 200 pages, the **2011 Edition** presents the Canadian market using our popular *Market at a Glance* summary with 13 Exhibits as well as detailed profiles of the leading manufacturers discussing each company's product strategy, marketing activities and distribution capabilities along with an analysis of future expectations of growth. Each contains four sections organised into 10 tables, so that, along with an additional 29 exhibits in the Market Detail section, the reader is provided with quantitative information on system and station shipments, installed base, system-size segmentation, technology segmentation, regional shipments, vertical markets and distribution channels.

This information is supplemented with estimates of the Canadian KTS/PBX/IP-PBX market in 2009, 2010 and 2011 including year-over-year comparisons, and a discussion of the market situation and our resulting forecast for the years 2012 and 2013. Seven market trends are identified regarding the market penetration of IP telephony, the future of key systems, threats to the traditional desk phone, tablet computers, buying rationales, strategic positioning of PBX manufacturers, and SIP trunking.

This report presupposes some familiarity with telecommunications but includes definitions where necessary for clarity. We use the terms "IP-enabled" and "IP telephony" when referring to the transmission of voice over a wide area data network while we use the terms "IP-based" and "LAN telephony" when referring to systems based