

## Hybrids Rule... At Least For Now

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According to the 1Q, 2007 Dell'Oro Group report, it looks like Hybrids continue to outpace pure IP, Cisco remains the strongest in the pure IP-PBX space and TDM shipments declined by 4 percent.



Hybrids remain king with \$1.1 billion in sales while pure IP lags with \$3.5 million in sales.

Last year some industry analysts pegged the Hybrid IP-PBX as a dead horse and it seems that all the big shows are often - not always, dominated by Cisco. There's also the theory we've discussed in and out of VoIPLoop blogs and BCR about "who's got the most marketing."

Then, there's the so called "tipping point." The moment in history when IP-PBXs outsold TDM and TDM sales slipped into decline - which will probably need a good look over again. Instead of relying to much on predictions, perhaps some truth-in-lending methods could apply to the reporting on the numbers/statistics vs. projections. Even then, some added notes about meanings of shipment vs installed vs stocked in the warehouse and even wired for and equipped as are warranted.

So what does it all mean?

Cisco has the most marketing and remains the strongest in the pure IP-PBX space;  
TDM shipments in 1Q 2007 declined by 4 percent;  
Hybrids remain top dog with \$1.1 billion in sales while pure IP systems lag with only \$3.5 million in sales.

Cisco spends a lot on marketing; TDM still isn't dead; the North American Telecommunications network remains largely analog/TDM; and pure IP systems are lagging in what was wrongly predicted. It looks like the disruptive technology did disrupt but it didn't disjoint what seems to be by popular vote a better way of doing telephony - at least for 1Q, 2007. It's a longer road to pure IP than what many want to admit or acknowledge. The customers ultimately decide what's best for them and until a lot more changes occur, improvements made and attitudes adjusted - I'd say we're looking at an interesting twist of fate. Avaya, Cisco, Intertel/Mitel (combined), NEC and Nortel are the top five sellers holding about 70 percent of sales in 1Q 2007. Hybrids are still in and unlike the so called "pure IP" systems - they aren't gas guzzlers, remain easier to adopt and manage, and offer a good "marketing" mix of technology to solution ratio.

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