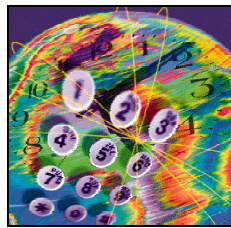


Telecom Turnaround: Positioning Services in the Service Provider Market



2004 Brand Tracking Study

With the telecommunications industry on a path to improvement, companies that provide network services for this market are jockeying for position in hopes of new sources of revenue and growth.

With continued economic, regulatory, and pricing uncertainties, however, network service firms need a detailed understanding of buyer priorities, perceptions, and purchase criteria in order to have a chance of success.

REPORT HIGHLIGHTS

OVERVIEW

Telecom Turnaround: Positioning Services in the Service Provider Market provides a detailed analysis of how IT and business executives in the telecom service provider market assess leading providers of network services and the market as a whole. The report focuses on network professional, rollout, and support services.

Based on interviews with 300 U.S.-based business and IT/network executives from large companies in six major segments of the telecom service provider market, the report is designed to help network services firms plan marketing initiatives, shape market perceptions, and track the effectiveness of marketing programs on an ongoing basis.

Key findings in the report include:

- Unaided and aided awareness of network service firms

- Familiarity with, favorability toward, and preference for doing business with network service firms
- Comparison of the positioning of network service firms
- Importance of attributes in the selection of network service firms
- Comparison of the relative strength of brand attributes of network service firms, including study sponsors and sponsor-specified peers
- Networking services buyers' goals and priorities
- Sources of information about network service firms

The report includes analysis by service provider segment, annual revenue level, title of respondents, and respondent job function (network executives vs. business executives).

COMPANIES COVERED

Companies covered in the report include: ADC, Alcatel, Cisco Systems, CH2M Hill, Ericsson, IBM Global Services, Juniper Networks, Lucent Technologies, Nortel Networks, Siemens, Telcordia Technologies, and Tellabs.

A number of other firms are also included in ratings and discussions of brand awareness.

STUDY METHODOLOGY

From September through November 2003, ITSMA conducted interviews with 300 network and business executives involved in the purchase of networking services to assess the brand awareness and market positioning of the major industry service firms. The study respondents primarily held director-level positions or higher and represented organizations in six major telecommunications industry segments and with annual revenue ranging from \$200 million to over \$20 billion.

MORE INFORMATION

To learn more about the report, contact Rob Leavitt, Senior Director, Marketing and Member Advocacy, at +1-781-862-8500, ext. 45, or rleavitt@itsma.com.

RESPONDENT DEMOGRAPHICS

Respondent titles

VP and C-level executives	20%
Directors	38%
Senior managers	23%
Managers	18%

Company size

\$200-999 million	17%
\$1-9.9 billion	27%
\$10 billion or more	56%

Industry Groups

Regional Bell Operating Company (RBOC)	21%
Wireless Provider	19%
Long Distance Carrier	18%
Incumbent Local Exchange Carrier (ILEC)	18%
Competitive Local Exchange Carrier (CLEC)	13%
Cable/Multiple Service Operator (MSO)	10%

Figure 4.1 Unaided Awareness of Network Rollout and Support Service Firms



Figure 1.8 Top Priority for the Next 6-12 Months

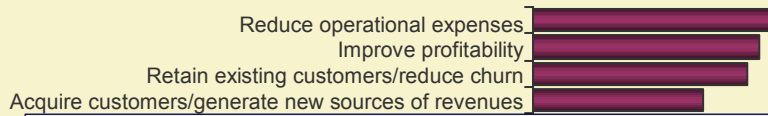


Figure 7.1 Mean Importance Ratings of Network Service Firms' Attributes

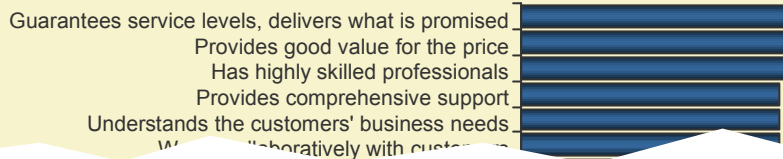


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