

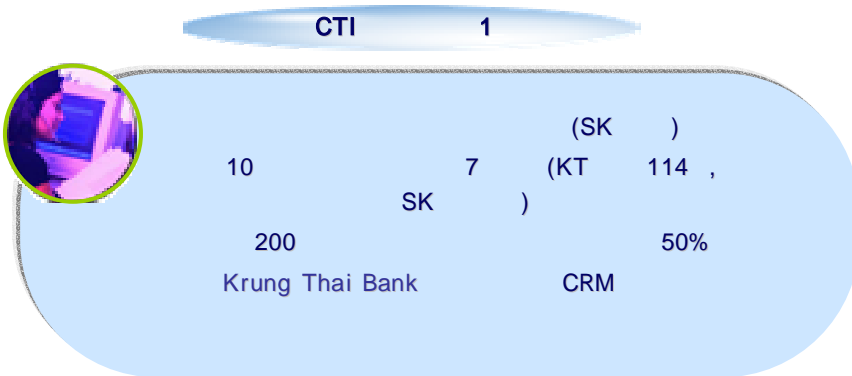
# Korea IP Telephony & IP Contact Center Market



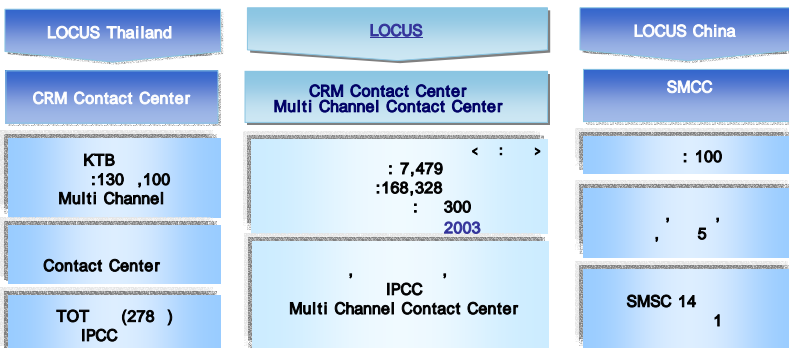
## About Speaker

- ( webmaster@callcenter.pe.kr )
- - ( )
  - MBA (eBusiness )
  - ( )
- PricewaterhouseCoopers (PwC)
- 
- &
- 
- CRM
- POSCO CRM
- : " " -

# About LOCUS



# LOCUS Global Networks



# LOCUS Contact Center Biz.



## Agenda

- **Why Convergence**
- **Where is the market today**
  - **Call Center Market**
  - **Voice Equipment Market**
- **Case Study**
  - **LOCUS Asia Market Development**

---

## Why Convergence

---

## Convergence – The Benefits

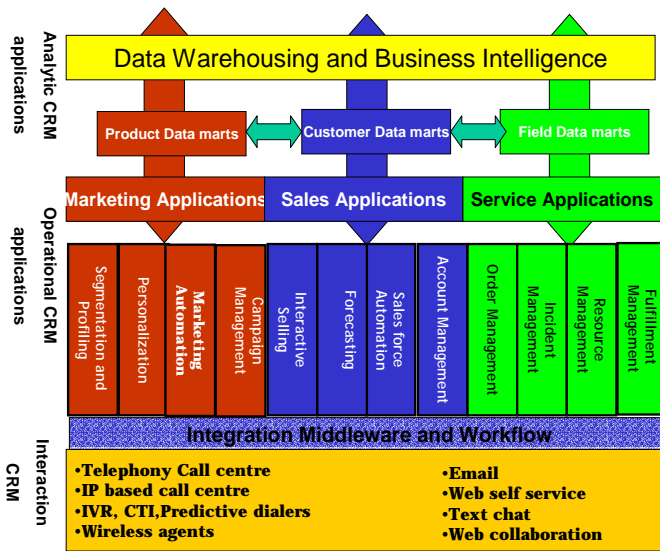
---

### Applications – The Key Long Term Driver

- Web Enabled Call Centers – Contact Centers
- Unified Messaging
- Agile Workplace
- Collaborative Working
- Ability to manage voice just like any other application on the desktop



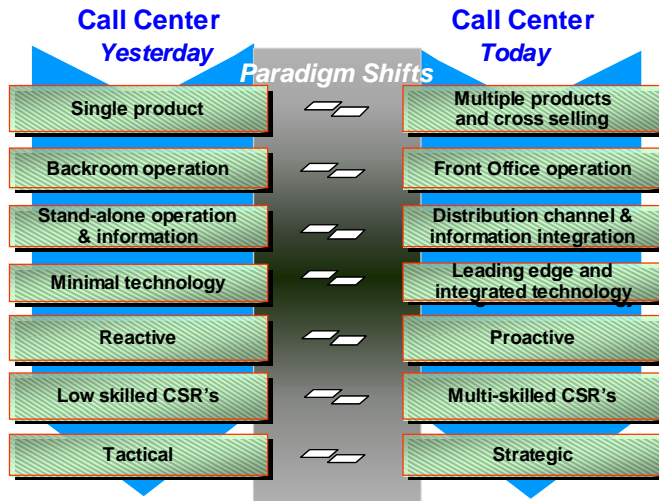
# CRM Architecture



9/29

2003 KOREA IP Contact Center Market

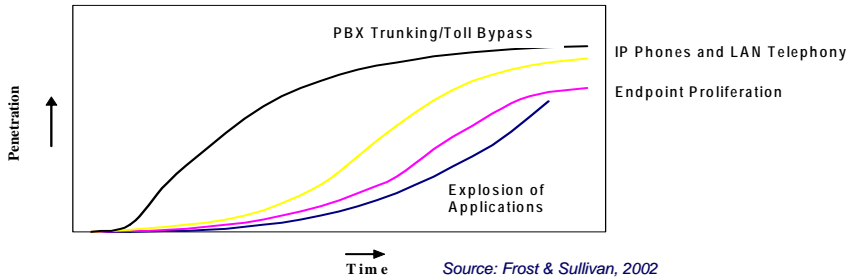
# Paradigm Shift



10/29

2003 KOREA IP Contact Center Market

# IP Telephony – Life Cycle



**Industry Life Cycle of the VoIP Industry**

PBX Trunking / Toll Bypass	<i>High growth stage</i>
IP Phones and LAN Telephony	<i>Initial to medium adoption stage</i>
Proliferation of End Points	<i>Initial adoption stage</i>
Explosion of Applications	<i>Be ready</i>

**Where is the market today**

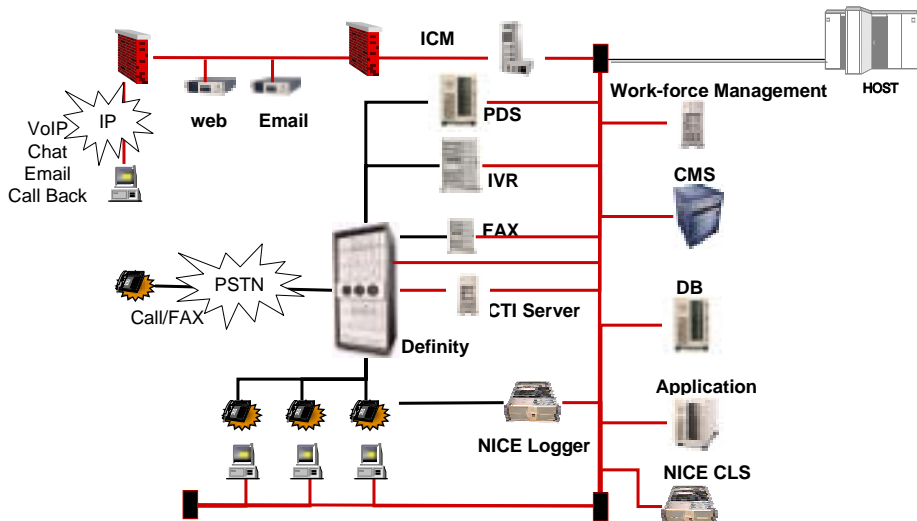
**Call Center Market**

# The Applications Covered ...

- ACD
- IVR
- CTI
- Predictive Dialers
- Real Time Web-Collaboration
- Voice Mail Messaging
- Call Monitoring Software
- Workforce Management Software
- Email Messaging
- Speech Technology



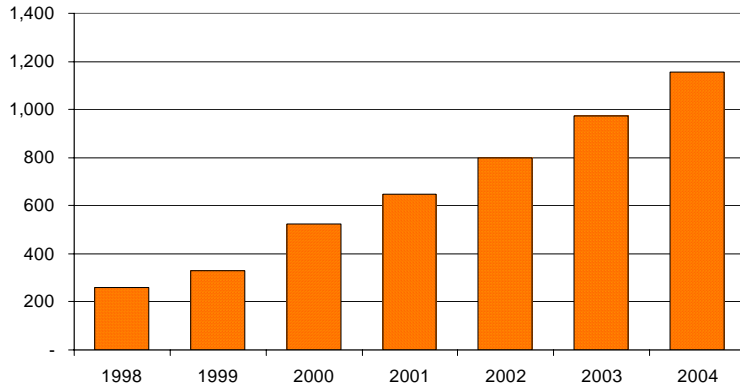
# Traditional Telephony Architecture



# The Forecast : Asia Pacific Interaction CRM

---

US\$ million



Source: Frost & Sullivan, 2002

15/29

2003 KOREA IP Contact Center Market

## The Major Trends

---

- **Move away from Best-of-Breed Solutions to a Solutions Suite Approach**
- **Growth in Small Call Centers (increasing demand from new verticals such as hospitality, travel, hospitals)**
- **Tremendous growth in IP Call Centers**
- **Multi-Channel Contact Centers gaining importance**

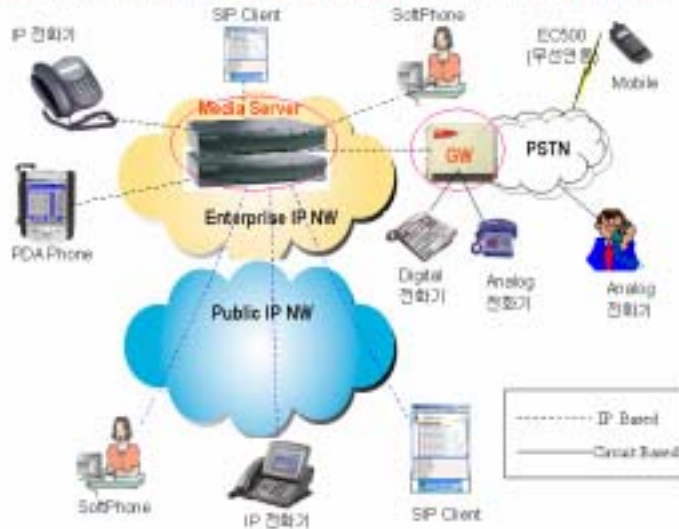
16/29

2003 KOREA IP Contact Center Market



# IP Based Communications

*IP based Communications via Avaya's Communications Solutions*



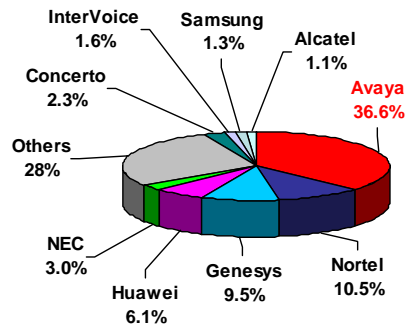
17/29

2003 KOREA IP Contact Center Market

## Asia Pacific Call Center Market Share

	Company	2001 Market Share %
1.	<b>Avaya</b>	<b>36.6</b>
2.	Nortel	10.5
3.	Genesys	9.5
4.	Huawei	6.1
5.	NEC	3.0
6.	Concerto	2.3
7.	InterVoice	1.6
8.	Samsung	1.3
9.	Alcatel	1.2

Total End User Revenue = US\$301M



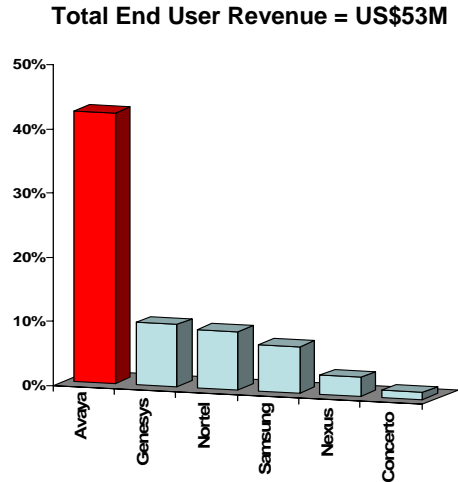
Source : Frost and Sullivan, Asia Pacific October 2002

18/29

2003 KOREA IP Contact Center Market

# South Korea Call Center Market Share

	Company	2001 Market Share %
1.	Avaya	42.2
2.	Genesys	9.7
3.	Nortel	9.1
4.	Samsung	7.3
5.	Nexus	3.0
6.	Concerto	1.1



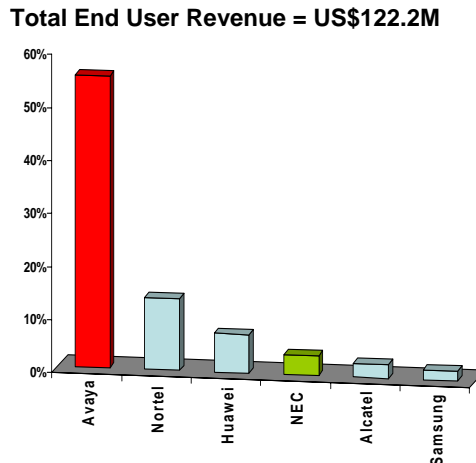
Source : Frost and Sullivan, Asia Pacific October 2002

19/29

2003 KOREA IP Contact Center Market

# Asia Pacific ACD Market Share

	Company	2001 Market Share %
1.	Avaya	55.0
2.	Nortel	13.8
3.	Huawei	7.3
4.	NEC	3.7
5.	Alcatel	2.6
6.	Samsung	1.9



Source : Frost and Sullivan, Asia Pacific October 2002

20/29

2003 KOREA IP Contact Center Market

---

## Where is the market today

Voice Equipment Market

## Major Trends Voice Equipment Market

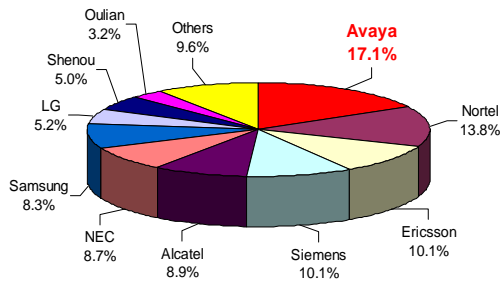
---

- **Deployment of IP Convergence**  
Applications gather momentum; dramatic growth expected in the next five years;
- **Pricing of IP PBX is as competitive as that of traditional PBX equipment;**
- **By the end of this decade, IP phones will become the standard desktop terminal in selected AP countries**

# Asia Pacific Traditional PBX Market Share

	Company	2002 Market Share %
1.	<b>Avaya</b>	<b>17.1</b>
2.	<b>Nortel</b>	<b>13.8</b>
3.	<b>Ericsson</b>	<b>10.1</b>
4.	<b>Siemens</b>	<b>10.1</b>
5.	<b>Alcatel</b>	<b>8.9</b>
6.	<b>NEC</b>	<b>8.7</b>
7.	<b>Samsung</b>	<b>8.3</b>
8.	<b>LG</b>	<b>5.2</b>
9.	<b>Shenou</b>	<b>5.0</b>
10.	<b>Qulian</b>	<b>3.2</b>

**Total End User Revenue = US\$758M**

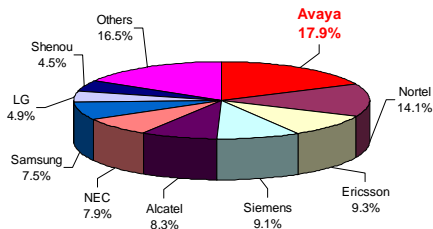


Source : Frost and Sullivan, Asia Pacific October 2002

# Asia Pacific Traditional PBX & IP-PBX Market Share

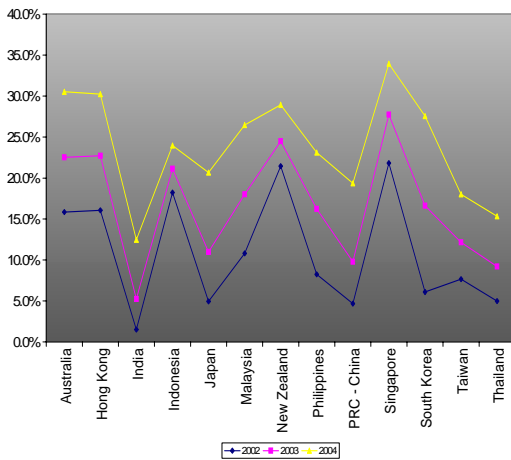
	Company	2002 Market Share %
1.	<b>Avaya</b>	<b>18.0</b>
2.	<b>Nortel</b>	<b>14.1</b>
3.	<b>Ericsson</b>	<b>9.3</b>
4.	<b>Siemens</b>	<b>9.1</b>
5.	<b>Alcatel</b>	<b>8.3</b>
6.	<b>NEC</b>	<b>7.9</b>
7.	<b>Samsung</b>	<b>7.5</b>
8.	<b>LG</b>	<b>4.9</b>
9.	<b>Shenou</b>	<b>4.5</b>
10.	<b>Cisco</b>	<b>4.1</b>

**Total End User Revenue = US\$842M**

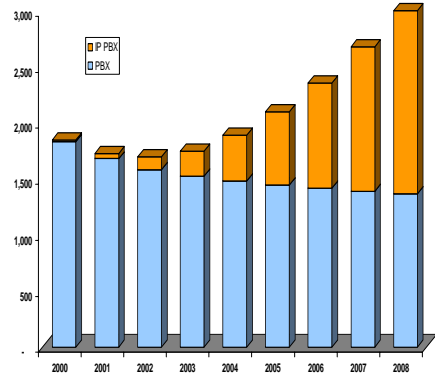


Source : Frost and Sullivan, Asia Pacific October 2002

# AP, Revenue Penetration Of IP PBX To PBX



Revenue (US\$ million)



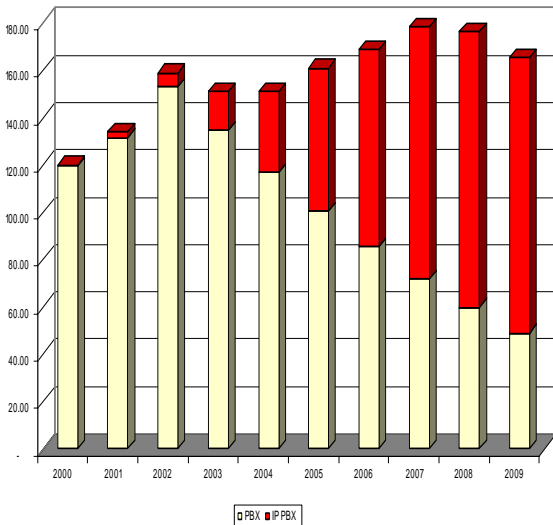
The IP PBX's revenue contribution is expected to increase Y-O-Y to 55% in 2008.

Source : Frost & Sullivan, 2002

Source: Frost & Sullivan, 2002

# South Korea IP PBX Market, 2000-2009

- Penetration of IP PBX to PBX grew to nearly 3.7% in 2002 in South Korea from under 1.9% in 2001
- Cost benefit as the key driver for migration
- Early adopters: education and large technology companies
- Co-existence of legacy TDM market and new IP equipment market
- Gradual approach in migrating to a converged network



Source : Frost & Sullivan, 2002

---

## Case Study

# LOCUS Asia Market Development

---

## LOCUS Thailand

Based in Bangkok, Thailand, Locus Telecommunication Inc., Ltd. (LTI) is Locus' hub for South East Asia, specializing in two main business areas - Call Center/CRM and Network Integration. LTI is the market leader in CTI-based multi-channel contact center solutions and customer-relationship management (CRM) application tools. Staffed with more than 80 professionals, LTI has served diverse clients in the banking, insurance, manufacturing, utilities and telecom operators - in Thailand, Australia, the Philippines, Singapore and Vietnam.

<b>Established</b>	December 1999
<b>CEO</b>	Andrew S. Yim
<b>Main Business Areas</b>	CTI Call Center & CRM Solutions Network Integration
<b>Number of Employees (Aug 2003)</b>	85 Persons
<b>Registration Capital</b>	353 million Baht (US\$ 8.9 million)

# LOCUS is M/S NO1 in Thailand

Customer	Business	Service	Implementation Period	# of Agents/Supervisors	Supplied Solutions
Thai Life Insurance	Life Insurance	CS/Voice/Inbound	01.12 - 02.08	35 / 4	Definity R9si, CMS, V33 IVR (30ch)/Fax (2ch)/Statistics, CTI Bridge, TelePro
Samsung Thailand	Enterprise	CS/Voice/Inbound	02.04 - 02.06	12 / 1	Definity R9si, CMS, Conversant IVR (30ch)/Fax, Active Enterprise, Wallboard
Samsung Australia	Enterprise	CS/Voice/Inbound	02.11	20 / 1	Definity R10si, CMS, Conversant IVR (30ch)/Fax, Active Enterprise, Wallboard
Samsung Philippines	Enterprise	CS/Voice/Inbound	02.12	12 / 1	Definity R10si, CMS, Conversant IVR (30ch)/Fax, Active Enterprise, Wallboard
Samsung Vietnam	Enterprise	CS/Voice/Inbound	03.01	12 / 1	Definity R10si, CMS, Conversant IVR (30ch)/Fax, Active Enterprise, Wallboard
Krung Thai Bank	Bank	CS/Multi/In & Outbound	02.01 - 03.08	115 / 15	Definity R10r, CMS, Conversant IVR (300ch)/Fax, IC, Nice (120ch Total), Wallboard, TelePro
TOT	Telco Provider	CS/Multi/In & Outbound	03.06 - Present	300 / 20	S8700 MC, CMS, I Audix, Conversant IVR (800ch)/Fax, IC, Nice (30ch Sel./SCS/Uni.), WFM, Siebel