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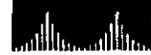
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##### High Performance

## Network Caching Technologies

Although the volume of Web traffic on the Internet is staggering, a large percentage of that traffic is redundant---multiple users at any given site request much of the same content. This means that a significant percentage of the WAN infrastructure carries the identical content (and identical requests for it) day after day. Eliminating a significant amount of recurring telecommunications charges offers an enormous savings opportunity for enterprise and service provider customers.

Web caching performs the local storage of Web content to serve these redundant user requests more quickly, without sending the requests and the resulting content over the WAN.

### Growth of Web Content

Data networking is growing at a dizzying rate. More than 80% of Fortune 500 companies have Web sites. More than half of these companies have implemented intranets and are putting graphically rich data onto the corporate WANs. The number of Web users is expected to increase by a factor of five in the next three years. The resulting uncontrolled growth of Web access requirements is straining all attempts to meet the bandwidth demand.

### Caching

Caching is the technique of keeping frequently accessed information in a location close to the requester. A Web cache stores Web pages and content on a storage device that is physically or logically closer to the user---this is closer and faster than a Web lookup. By reducing the amount of traffic on WAN links and on overburdened Web servers, caching provides significant benefits to ISPs, enterprise networks, and end users. There are two key benefits:

- *Cost savings due to WAN bandwidth reduction*---ISPs can place cache engines at strategic points on their networks to improve response times and lower the bandwidth demand on their backbones. ISPs can station cache engines at strategic WAN access points to serve Web requests from a local disk rather than from distant or overrun Web servers.

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**current press releases**

**MEDIA METRIX RELEASES U.S. TOP 50 WEB AND DIGITAL MEDIA PROPERTIES FOR APRIL 2000**

*U.S. Internet users at work continue to spend more time on average and view more content online than at home users*

*Combined, users at home and at work spent over 46 billion minutes online in April*

**New York, NY May 22, 2000** - Media Metrix (NASDAQ: MMXI), the leader and pioneer in Internet and Digital Media measurement worldwide, today released the top 50 Web and Digital Media properties for April 2000. According to Media Metrix, users at work spend more time online and view more content on average than users at home (484.3 pages vs. 418.3, respectively). For details see chart below:

Media Metrix, Inc.						
U.S. Internet Usage At Home and At Work Separate and Combined						
April 2000						
	Avg. Usage days	Avg. Unique Pages/day	Avg. unique pages/Month	Total min (000,000)	Avg. Minutes/day	Avg. min/mo
Work	10.7	45.4	484.3	13,910	49.7	529.6
Home	10.4	40.2	418.5	32,074	42.7	445.3
Combined	12.8	44.9	573.1	46,059	48.3	615.8

Media Metrix, Inc.		
Top 50 Digital Media/Web Properties At Home & At Work Combined in the United States		
April 2000 Measurement Period (4/1/2000 through 4/30/2000)		
Rank	Top Web & Digital Media Properties	Unique Visitors (000)
	<i>All Digital Media</i>	77,883
1	AOL Network* - Proprietary & WWW	58,592
2	Yahoo Sites*	48,592
3	Microsoft Sites*	47,159

4	Lycos*	32,244
5	Excite@Home*	30,117
6	Go Network*	22,347
7	NBC Internet*	16,267
8	About.com Sites*	16,084
9	Amazon*	14,174
10	AltaVista Network*	13,319
11	Time Warner Online*	12,966
12	Real.com Network*	12,791
13	Ask Jeeves*	12,335
14	Go2Net Network*	12,299
15	eBay*	11,964
16	LookSmart*	11,257
17	eUniverse Network*	10,866
18	ZDNet Sites*	9,840
19	CNET Networks*	9,743
20	JUNO /Juno.com	8,514
21	FortuneCity Network*	8,241
22	Viacom Online*	8,138
23	EarthLink*	8,072
24	SMARTBOTPRO.NET	7,849
25	American Greetings*	7,796
26	Iwon.com	7,608
27	Infospace Impressions*	7,565
28	The Weather Channel*	7,543
29	CitySearch-TicketMaster Online*	7,393
30	Snowball*	7,124
31	AT&T Web Sites*	7,102
32	Freelotto.com	7,061
33	GoTo*	6,731
34	Travelocity*	6,238
35	The Women.com Networks*	6,111
36	Village.com:The Womens Network*	5,762
37	News Corp. Online*	5,658
38	Mypoints.com	5,614
39	Lifeminders.com	5,527
40	Win Sites*	5,425
41	MarketWatch.com Sites*	5,372
42	Promotions.com Sites*	5,296
43	Mapquest.com	5,103
44	The Uproar Network*	4,975
45	Shopnow Network*	4,958
46	Mailbits.com	4,947
47	OnHealth*	4,861

48	Homestead Sites*	4,823
49	Luckysurf.com	4,804
50	Sportslines.com Sites*	4,800

**Chart Definitions:**

\*Digital Media: Includes users of the World Wide Web, proprietary online services, and/or other ad-supported digital applications such as e-mail services and CD ROM.

Top 50 Digital Media & Web Properties: The top 50 Digital Media & Web properties are based on unduplicated audience reach, also known as unique visitors.

Digital Media & Web Properties include the largest single brands as well as consolidations of multiple domains that fall under one brand or common ownership.

Unique Visitors: The actual number of total users who visited the reported Web site or online property at least once in the given month. All Unique Visitors are unduplicated (only counted once) and are in thousands.

**About Media Metrix**

Media Metrix, Inc., with over 750 clients, is the leader and pioneer in Internet and Digital Media measurement and the industry's source for the most comprehensive, reliable, and timely audience ratings, e-commerce, advertising and technology measurement services. Media Metrix' AdRelevance division, through its superior ad tracking technology, provides clients the most comprehensive data on where, when, how and how much Web marketers and their competition are advertising online.

Media Metrix has worldwide majority-owned operations through partnerships with media and market research leaders around the world. Media Metrix' European division, known as MMXI Europe, operates in France, Germany, Sweden and the United Kingdom. Media Metrix also operates in Australia, Canada, Japan, Latin America and the United States. The Company provides advertising agencies, media companies, e-commerce marketers, financial services and technology companies with the most comprehensive coverage of all digital media (including more than 21,000 Web sites and online properties). Media Metrix utilizes its patented, superior operating-system metering methodology to track Internet and Digital Media audience usage behavior in real-time - click-by-click, page-by-page, minute-by-minute. Media Metrix has a sample of over 70,000 people under measurement worldwide, yielding monthly, weekly, and daily data collection and reporting. Please visit us at [www.mediametrix.com](http://www.mediametrix.com) for more information.

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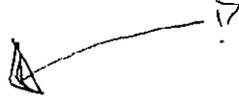


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## Value Proposition



### Enterprise

#### Offload up to 60% of WAN Traffic

Implementing the Bacchus service will enable enterprises to offload up to 60% of WAN traffic. In some companies, as much as 60% of WAN traffic is related to Internet requests. Bacchus minimizes traffic over WAN and Internet links by significantly reducing the number of user requests that must travel to origin web servers. Unlike caching services at the "edge of the network," the Bacchus service truly minimizes the impact of Internet traffic on the enterprise's network.

#### Improved Web Access Performance

The need for improved web access performance has grown tremendously worldwide, as evident in Exhibit B. As companies increase their Internet and intranet usage, the resulting traffic is having more of an impact on business-critical applications such as email and database access. According to the Strategis Group's 1999 Business Internet and Data report, approximately half of US enterprises are likely to upgrade their Internet access speed within a year. The Bacchus service can improve web access performance by 35-50%, an improvement that may eliminate the need to invest in costly and time-consuming terrestrial upgrades.

#### More Cost Effective Delivery of Rich Content

*Internet  
Intranet*

As bandwidth-intensive applications proliferate, enterprises have recognized that terrestrial transmission of rich media content is not cost-effective. Pioneer Consulting's Satellite Mediacasting Report (March 2000) confirmed that satellite mediacasting was a more cost effective solution than terrestrial multicasting. Businesses which regularly transmit information from a central server to multiple (more than 10) remote locations can deliver streaming video Webcasts, business TV, videoconferencing applications and other intranet content at a fraction of the cost by using the Bacchus service. With Bacchus, the more sites that receive the multicast content, the more cost-effective the solution becomes.

#### Bandwidth Savings of 30%

KJ  
Mediacasting report: pg. 1-25 Caches typically reduce the need for network b/w by an average of 35%.

*Jennifer Hawks*

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### 2000 U.S. Medium Business Networking (LAN and WAN)

Published: July 2000  
 Order Code: R149-051W  
 Price: \$3500 Print Copy  
 Published by: Access Markets International Partners, I



Description

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Of the 157,000 medium businesses in the U.S., 135,000 have implemented local-area networks (LANs) and 59,000 have implemented wide-area networks (WANs). These businesses spent a total of \$14.5 billion on LAN and WAN-related hardware, software, and services last year. As such, they represent a significant and growing market for LAN and WAN vendors. This report presents detailed findings of the current and projected trends in the implementation and usage of LANs and WANs based on AMI-Partners' survey of 323 medium businesses.

Major highlights of the report include the following:

U.S. medium businesses adopt networking and other advanced communications technologies in a systematic order, beginning with LANs, and then moving on to WANs followed by other advanced technologies like VPNs, call centers, and IP-based call centers. AMI estimates that currently, there are about 22,000 U.S. medium businesses that have no networking and 135,000 U.S. medium businesses have LANs. Of these 135,000 U.S. LAN medium businesses, 74,000 do not have WANs and 36,000 have WANs but no VPNs, call centers, or any plans to migrate to IP-based call centers. The remaining 24,000 U.S. medium businesses have LANs, WANs, and at least one advanced communications technology like VPN, call center, or planned IP-based call center.

AMI-Partners estimates that the total U.S. medium business workforce has 37.4 million employees, 78% of them working for core U.S. medium businesses. The U.S. medium business workforce accounts for 27% of the entire U.S. workforce (140 million employees). 13.7 million employees work for U.S. medium businesses headquartered in major metropolitan areas, while 11.6 million are employed by U.S. medium businesses in medium cities, and 10.9 million for U.S. medium businesses located in small towns and rural areas.

The average annual IT budget to deploy various networking initiatives was approximately \$488,000 per medium business. Nearly half of all U.S. medium businesses expect their IT budgets to increase over the next 12 months, with another 45% believing their budgets will remain the same. However, judging from past and planned IT acquisition plans, AMI-Partners believes that actual IT spending levels will most likely be more robust than expected.

Over two-thirds of all U.S. LAN-enabled medium businesses reported purchasing at least one LAN server last year. Collectively, all the U.S. LAN medium businesses purchased about 282,000 LAN servers last years.

Among the verticals, the highest proportion of U.S. medium businesses that purchased LAN servers were from FIRE and professional business services. The lowest proportion of U.S. medium businesses that purchased LAN servers last year were in the retail

sector. U.S. medium businesses based in major metros have nearly twice the average number of LAN servers, both at their head offices as well as their branches, than U.S. medium businesses based in small towns and rural areas.

The total spending on LAN servers increased marginally in 2000. The largest increase took place in spending by U.S. medium businesses with 100-249 employees, which spent \$1.8 billion in 2000 compared to \$1.1 billion in 1999.

AT&T has the largest share of datacom business among both the expanded U.S. medium businesses and the core U.S. medium businesses, followed by Bell Atlantic. The most important factors in the selection of a datacom vendor are quality of service and up-time performance guarantees followed by the ability of the vendor to provide a seamless network with remote locations. The ability of the vendor to provide service on a global scale is the least important factor.

Quality of service is also the most important factor in implementing voice/data integration. This is true for U.S. medium businesses in all size categories. This is followed by the reduction in total cost of communications. The ability to provide users with new applications is the least important factor in implementing voice/data integration.

Based on proprietary surveys of small and medium businesses in the United States, Europe, and the Asia/Pacific region, AMI-Partners' comprehensive data on the Internet, IT, e-business, and communications investment and usage is presented in a highly actionable, graphical format with go-to-market insights and analysis. For more information, use the "Contact AMI" option on the navigation bar at left, or call us directly.

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# I

## Executive Summary

### INTRODUCTION TO THE U.S. INTERNET CONTENT DELIVERY MARKET

For the purposes of this study, Frost & Sullivan defines the U.S. content delivery market as a complete solution for distributing and delivering Web-based content closer to the end user. This report's major segments consist of content delivery services and infrastructure. Content delivery services companies covered in this report have deployed their own content delivery network. Companies that provide content delivery infrastructure offer caching and traffic management solutions that replicate, distribute, manage, track, and monitor content at the edge of networks.

Content delivery services and infrastructure firms offer automatic and seamless delivery of content to remote sites as well as intelligent routing of user requests to the sources of the content. Content delivery products and services improve the uploading of Web sites and offer reliability and protection from site crashes due to demand overloads. Content delivery products and services enable content providers, Internet service providers (ISPs), network service providers (NSPs), hosting firms, and enterprises to confidentially offer service level agreement guarantees to their customers.

Chart 1.1 illustrates the market segmentation of this report. As shown in the chart, the major market segments include the following:

- U.S. Internet Content Delivery Services Market
- U.S. Internet Content Delivery Infrastructure Market