



TeleSoft

NEWS

TELECOM DATACOM INTERNET

TeleSoft Partners

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A WORD FROM THE FIRM

With this newsletter, TeleSoft begins a monthly review of events covering the expanding set of companies in our portfolio, as well as an update on TeleSoft Partners. As our family of portfolio companies grows—total investments count 30 companies as of this writing—the pace of public filings, acquisitions, product launches, and other interesting notes increases in step. This publication should help you stay on top of our news.

It has been a busy start to the New Year at TeleSoft. We kicked off fundraising for TeleSoft II and anticipate a first close in June. New investments this year include BayPackets, Coreon, Kymata, Lynx Photonic Networks, and TollBridge Technologies. On a lighter note, we enjoyed a company weekend in Tahoe in March, taking advantage of some late season skiing.

I'm excited about our prospects for the year, and hope you find this letter helpful in keeping abreast of ongoing TeleSoft news.

Arjun

TeleSoft Founder and Chief Believer

NEW INVESTMENTS IN 2000



TOLLBRIDGE™



EXECUTIVE RECRUITING

In future issues, we will have an Executive Recruiting section highlighting key job opportunities at our portfolio companies.



FOR MORE INFORMATION

*about TeleSoft Partners,
visit our Web site at*

<http://www.telesoftvc.com>



@Link: <http://www.atlinknetworks.com>

- @Link launches next-generation broadband services in Indianapolis (4/17).
- @Link and Nortel Networks join forces to deliver performance guarantees for high-speed, business critical applications (1/29).
- Veteran telecommunications and e-commerce marketer Ray O'Brien is named chief marketing officer (1/26).
- @Link hires Hank Carabelli as president and chief operating officer (1/24).

Athene Software:

<http://www.athenesoft.com>

- Athene's APT Churn™ predicts subscriber behavior with more than 90 percent accuracy (2/28).
- Athene and AMS team up to provide customer retention and profitability enhancement solution to communications firms (2/1).
- Athene integrates APT Churn™ with new LHS product, BSCSAdvise (1/26).

COLO.com: <http://www.colo.com>

- APW-Wright Line partners with COLO.com to provide enclosure platforms for today's colocation services (4/12).
- RateXchange partners with COLO.COM to expand network of bandwidth delivery hubs (4/5).
- StrataSource to partner with COLO.COM. Joint initiative will be the first to offer new outsourcing model, maximizing uptime (3/28).
- COLO.com announces a strategic partnership with InterNAP Network Services, as part of InterNAP's Preferred Colocation Provider Program (2/15).

CoSine Communications:

<http://www.cosinecom.com>

- New IP-enabled frame relay service solves scalability problem for frame relay networks (4/10).

- CoSine is named "Investors' Choice" at the prestigious Technologic Partners' Network Outlook Conference (3/21).
- CoSine is awarded a \$20 million purchase order from AduroNet. It also introduces the IP Revenue Starter (RSK) (3/13).
- CoSine, with Copper Mountain Networks, announces the availability of the industry's first "IP intelligent edge" Digital Subscriber Line (DSL) solution (2/29).
- CoSine expands its global service and support organization to Europe, opening an office in Paris to support customers in 12 countries (2/22).
- Qwest places a multimillion dollar purchase order for CoSine's IP Service Delivery Platforms (2/7).

EmpowerTel Networks:

<http://www.empowertel.com>

- EmpowerTel receives a round of funding totaling \$54 million (2/14).
- Lara Technology announces the creation of EmpowerTel Networks, a separate company that has taken over Lara's Voice-over-IP (VoIP) systems business (1/24).

InfoLibria: <http://www.infolibria.com>

- InfoLibria announces the DynaCache™ Series 10, which allows service providers and enterprises to distribute content on their networks economically while using minimal space in the server farm (4/30).
- InfoLibria's streaming media solution, MediaMall,™ wins *Network Magazine's* 2000 Product of the Year Award for the streaming media category (4/17).
- InfoLibria and PassEdge Corporation announce a partnership to develop a highly secure streaming media solution for the distribution of Web video, audio, and other proprietary content on Web networks (4/12).



- InfoLibria announces the InfoLibria Mass Media Initiative (iMMI) (4/10).
- InfoLibria joins the Broadband Content Delivery Forum (BCDF) (4/5).
- Procom Technologies plans to resell InfoLibria's DynaCache (3/14).
- InfoLibria is selected to participate in the newly expanded Microsoft Partner Solution Center (3/13).
- DynaCache emerges as the best cache for public networks at the Second IRCache Web Cache Bake-off (2/28).
- InfoLibria broadens its presence in Great Britain through partnerships with Net Products and TNS Distribution (2/16).
- InfoLibria is selected as a vendor for AT&T's Intelligent Content Distribution service (1/27).
- InfoLibria announces new infrastructure functionality to support Web content services (1/27).

Kymata: <http://www.kymata.com>

- Kymata secures 75 million Euros (\$72 million) of funding from prominent U.S. and European institutions (3/6).
- Kymata announces its intention to create 150 jobs over the next year, bringing its total workforce to 250 (1/31).

Lara Technology: <http://www.laratech.com>

- Lara Networks launches its global Lara Alliance Partnership (LAP) program (4/10).

- Lara Networks is being adopted as Lara Technology's new name for its silicon-based search engine division (3/27).
- Lara introduces the LTI7020, the world's fastest two megabit user-configurable, variable width Search Processor for high performance Internet devices (2/29).
- Lara announces the appointment of Bhanu Nanduri as vice president of business development (1/31).

SigmaTel: <http://www.sigmatel.com>

- SigmaTel files two summary judgment motions with the U.S. District Court to dismiss the '841 infringement claim in the ongoing case with Crystal Semiconductor (4/6).
- SigmaTel has won a major victory at the recent preliminary injunction hearing in the ongoing lawsuit in which Cirrus Logic and Crystal Semiconductor allege patent infringement (3/6).
- Don Muskopf is hired as SigmaTel's new CFO, while Mark VanZanten joins as the vice president of worldwide sales and business development (2/7).

Star One: <http://www.starone.de>

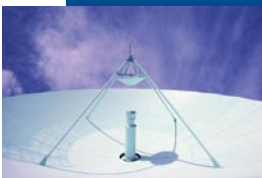
- Carrier 1 International and Star One AG sign a \$71.5 million contract (3/30).
- Star One successfully closes its second round of funding in which the company raised Euro 72 million in equity (2/2).

TollBridge Technologies: <http://www.tollbridgetech.com>

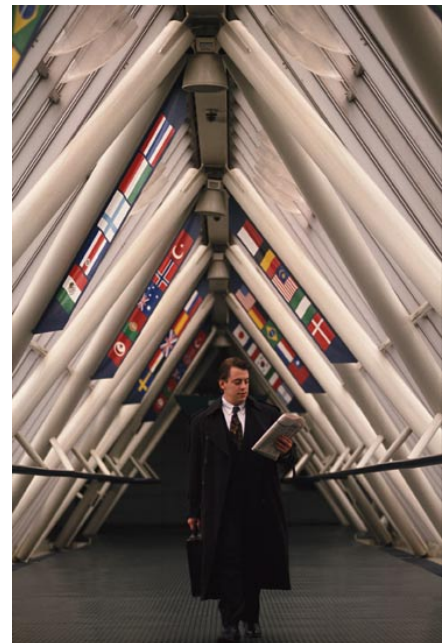
- Smart Link signs licensing agreement with TollBridge (4/17).
- Thrifty Call and TollBridge partner to deliver Voice-over-DSL services at Texatel (4/10).
- TollBridge and Broadcom team up to deliver carrier class Voice-over-Cable (3/14).



Portfolio News



- TollBridge announces the first IP-based Voice-over-Cable gateway delivering full telephony features and metropolitan area scalability (3/14).
- LSI Logic invests in TollBridge, a Voice-over-Broadband leader (3/13).
- TollBridge raises \$45 million in the mezzanine round of financing (3/13).
- TollBridge announces GR-303 Certification for its TB200 with Nortel DMS Class 5 switches (3/13).
- Steve Morrison joins TollBridge as vice president of engineering (3/8).
- Bizfon announces partnership with TollBridge at CT Expo (3/7).
- Telco Systems partners with TollBridge in developing network compatible multiservice access solutions for its EdgeLink Line (2/28).
- ADTRAN and TollBridge partner to provide Voice-over-DSL IAD devices to the booming CLEC market (2/28).
- TollBridge adds 3Com CFO Chris Paisley to its board of directors (2/28).
- TollBridge is named market leader in the Synergy Research Group report (2/25).
- TollBridge teams up with Softswitch and next-generation software vendors to drive new network applications (2/24).
- Affordable Voice-over-DSL IAD is the result of a new strategic partnership between Xpeed and TollBridge (2/24).
- ipVerse and TollBridge join forces to speed delivery of enhanced Voice-over-Broadband services to carriers (2/4).
- TollBridge announces the Voice of Broadband Alliance and Open Source licensing (2/22).
- BRECIS Communications joins TollBridge's Voice of Broadband Alliance (2/22).
- Copper Mountain and TollBridge advance Voice-over-DSL interoperability initiative (2/22).
- TollBridge and 2Wire team up to deliver voice services over DSL to residential customers (2/22).
- BizFon partners with TollBridge to provide advanced voice and data solutions (2/22).
- Ramp Networks partners with TollBridge to provide interoperability for voice and data CLECs (2/22).
- Woodwind partners with TollBridge to advance Voice-over-DSL interoperability (2/22).
- Ken Schneider rounds out TollBridge's senior management team as chief financial officer (2/16).
- netActivate and TollBridge launch partnership to provide the world's first solution for instant, error-free Voice-over-DSL and Voice-over-IP (1/25).
- TollBridge announces TollView™ Automated Service Activation and Provisioning System (1/24).





- TollBridge and BTI Telecom partner to deliver Voice-over-DSL services at Comnet (1/24).

VINA Technologies:

<http://www.vina-tech.com>

- Kay Kienast strengthens VINA's top executive team as vice president of marketing (4/18).
- VINA and Data Connectivity expand voice and Internet integration options for small and mid-sized businesses (4/3).
- VINA announces plans to support MCI Worldcom's Smart Bandwidth Service (3/30).
- John Neese is named vice president of engineering (3/28).
- VINA and TeraBridge unite to deliver next-generation broadband access solutions for service provider networks (3/27).
- VINA's integrated access solution gives NEFAB remote access to mission-critical system (3/21).
- Diane Pewitt is appointed vice president of operations (3/20).
- Wiedeman Architects implements VINA's Multiservice T1 Integrator[®] at the core of its voice, data, and Internet infrastructure (3/14).
- VINA secures \$23.8 million in its fourth round of venture financing (3/13).
- BizSpace, a fast-growing Internet venture, implements VINA's Multiservice T1 Integrator[®] (2/7).
- AdvaTel becomes a distributor of VINA's Multiservice Xchange[™] (MX) (1/25).



- Yamaha Motor World implements VINA's Multiservice T1 Integrator[®] at the core of its voice and Internet infrastructure (1/24).
- VINA and Convergent Networks announce interoperability between VINA's Multiservice Xchange[™] integrated access device (IAD) and Convergent Networks' Integrated Convergence Switch (ICS2000) (1/18).
- VINA announces DSL eLink[™], expanding its family of integrated access device (IAD) solutions to support Voice-over-DSL (1/17).
- VINA secures a multiyear network equipment purchasing agreement with Intermedia Communications (1/10).

Xpedion Design Systems:

<http://www.xpedion.com>

- Elanix and Xpedion announce a new integrated software suite consisting of SystemView by Elanix[®] system-level design software and Xpedion's GoldenGate/Sim[™] RF and microwave simulation software (2/22).
- Xpedion announces the integration of its GoldenGate[™] family of RF simulation and behavioral modeling products with the COSSAP[®] System Level Design product family from Synopsys (2/22).
- Xpedion introduces two new electronic design automation (EDA) products — GoldenGate/Sim[™] and GoldenGate/NN-Model Compiler[™] — that dramatically accelerate design cycles for RF and wireless communication designs (1/31).
- Xpedion names Richard Curtin as senior vice president of sales and marketing (1/4).

BROADBAND DATA NETWORK SERVICES

Dallas, TX
May 2000
Participating: TollBridge

MORGAN STANLEY/GOLDMAN SACHS

May 2000
Participating: TollBridge

CABLE 2000

New Orleans, LA
May 7–10
Participating: TollBridge

TRA 2000 SPRING CONFERENCE

Philadelphia Marriott
May 8–11
Participating: COLO.COM

NETWORLD + INTEROP 2000

Las Vegas Convention Center
May 9–11
Participating: CoSine, InfoLibria, Lara

DIGITAL HOLLYWOOD

The Puck Building–Soho
New York, NY
May 15
Participating: InfoLibria

COMPUTER & TELEKOMMUNIKATIONS NETZE 2000

Rhein-Main-Hallen
Wiesbaden, Germany
May 16
Participating: InfoLibria

ALTS 2000 BUSINESS CONFERENCE

Miami Convention Center and Loews Hotel
Miami, FL
May 21–24
Participating: VINA, TollBridge, EmpowerTel

REAL CONFERENCE 2000

San Jose Convention Center
San Jose, CA
May 22–26
Participating: InfoLibria



Conference Calendar

ISPCON 2000

Orlando County Convention Center
Orlando, FL
May 23–25
Participating: COLO.COM, InfoLibria

VOICE OVER BROADBAND SEMINAR

Miami, FL
May 25
Participating: TollBridge

CARRIER WHOLESALE MARKETS

The London Arena, London, UK
May 31–June 2
Participating: COLO.COM

SUPERCOMM 2000

Georgia World Congress Center
Atlanta, GA
June 4–8
Participating: CoSine, EmpowerTel, InfoLibria, Lara, TollBridge, VINA

DESIGN AND AUTOMATION CONFERENCE

Los Angeles Convention Center
June 5–9
Participating: Xpedion

STREAMING MEDIA EAST 2000

New York Hilton and Towers
New York, NY
June 12–14
Participating: InfoLibria

THE IEEE MICROWAVE THEORY AND TECHNIQUES SOCIETY (MTT-S)

Boston, MA
June 13–15
Participating: Xpedion

IIR CONFERENCE

Forum Hotel, London, UK
June 14
Participating: InfoLibria

TELECOM & INTERNET INFRASTRUCTURE CONFERENCE

St. Regis Hotel, New York, NY
June 14–15
Participating: CoSine

EXPO COMM SPAIN

Palacio Municipal de Congresos
Madrid, Spain
June 14–16
Participating: VINA

DSL SUMMIT 2000

Denver, CO
June 19–21
Participating: TollBridge

MULTIMEDIACOM 2000

San Jose Convention Center
San Jose, CA
June 20–23
Participating: InfoLibria

BROADBAND YEAR 2000

San Jose Convention Center
San Jose, CA
June 26–30
Participating: TollBridge, VINA

NETWORKS UK

NEC Birmingham, England
June 27–29
Participating: CoSine

COLOCATION SUMMIT

London Intercontinental Hotel
London, UK
June 29–30
Participating: COLO.COM

DSL COMFORUM

Westin O'Hare Hotel
Rosemont (Chicago), IL
July 24–27
Participating: TollBridge