

Worldwide Telecom Black Book

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *Worldwide Telecom Black Book* service offers comprehensive views (both detailed and consolidated) of the $1 trillion global telecom market and of growth opportunities for network equipment vendors and network service providers in national and global telecommunications markets. These comprehensive views highlight voice and data services spending, fixed and mobile network operator revenue, network operator infrastructure spending, and enterprise and consumer spending on network equipment. Market size and forecast details are provided at the country level, with aggregations to the regional and global levels.

Markets Covered

This service covers the following segments of the telecommunications market:

- Telecommunications services
- Telecommunications equipment

Subjects Analyzed

Throughout the year, this service will address the following topics:

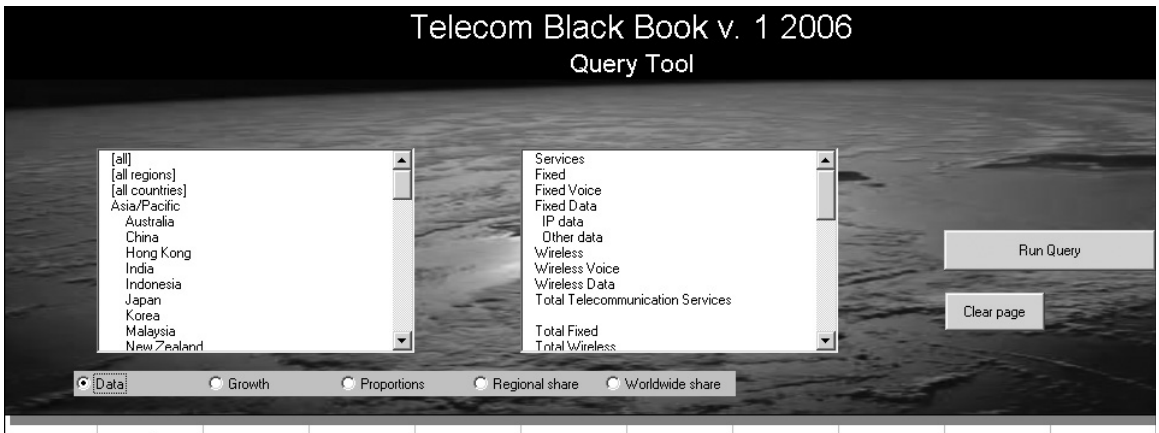
- Voice and data wireline revenue
- Voice and data wireless revenue
- Network equipment sold to service providers
- Network equipment sold to enterprises
- Network equipment sold to consumers
- Wireless network equipment revenue
- Hardware sold to network service providers
- Software sold to network service providers
- Services sold to network service providers
- Internet households
- Broadband households
- Fixed access lines and wireless subscribers

Key Questions Answered

Our research addresses the following issues that are critical to your success:

1. What is the relationship between wireless and wireline services?
2. How do growth trends for IP solutions compare with growth in traditional data services?
3. What are the size and growth rates of equipment sold to enterprises and service providers?
4. Which regions represent the fastest-growing market opportunities?

Product Snapshot



Data (US$ millio	Segment	2003	2004	2005	2006	2007	2008
Asia/Pacific	IP data	13,247.80	16,509.45	20,402.41	23,359.67	26,249.74	29,068.38
Central Eastern	IP data	2,967.29	3,546.91	4,196.65	4,887.54	5,635.27	6,382.94
Latin America	IP data	871.80	1,017.39	1,310.49	1,656.90	2,077.43	2,515.10
Middle East Af	IP data	4,076.34	4,580.74	5,157.99	5,689.24	6,180.25	6,980.01
North America	IP data	37,359.93	40,721.43	44,552.30	49,998.19	57,404.86	64,680.82
Western Europ	IP data	34,094.08	38,564.30	42,943.60	47,419.23	50,564.66	53,939.67
Worldwide	IP data	91,616.04	104,002.97	117,688.33	132,190.42	147,353.66	162,871.67

Source: IDC

Companies Analyzed

IDC's *Worldwide Telecom Black Book* service examines how leading providers are positioning themselves to compete in the telecommunications market. This service reviews strategies, market positioning, and future direction of several providers in the telecommunications market, including:

Alcatel, AT&T, Avaya, Bell Canada, BellSouth, BT, Cable & Wireless, China Mobile, China Netcom, China Telecom, Cisco, DT, Ericsson, FT, Huawei, KDDI, Lucent, Marconi, MCI, Mitel, Motorola, Nokia, Nortel, NTT, PCCW, QUALCOMM, Qwest, Reliance Infocomm, Siemens, SingTel, SK Telecom, Softbank/Japan Telecom, Sprint, Telecom Italia, Telefonica, TeliaSonera, TelMex, Telstra, Telus, UTStarcom, Verizon, Vodafone, and VSNL.

Research Agenda

This service will provide the following quarterly deliverable:

Quarterly Delivery of Worldwide Communications Spending
This interactive tool is delivered on CD-ROM and includes communications spending data across all countries and major market segments.

A Complete Intelligence Solution

IDC offers a complete market intelligence solution customized to meet your business requirements. The array of products and services available to you includes:

- The opportunity to have your specific questions answered through personal interaction with industry experts who cover the topics and markets in your service
- Around-the-clock access to our market intelligence on idc.com, IDC's personalized Web experience
- A view of the market's future with 12 months of continuous intelligence about its direction and the reasons behind it, along with actionable advice for taking advantage of existing and emerging opportunities
- Special client discount pricing on purchases of research from other services
- Complimentary admission to IDC's annual Directions conference, where you'll hear our latest forecasts and network with IDC analysts and other industry professionals
- Complimentary invitations to monthly executive telebriefings, interactive forums designed to provide you with insights about research and strategies directly from IDC analysts

To find out how our flexible packaging options can meet your specific business needs, please contact your IDC sales executive.

IDC's Investment Philosophy

As a privately held company, IDC believes that our customers are our primary constituency. A large percentage of every revenue dollar is reinvested back into our products, including more analysts, more geographic coverage, and extensive primary research.

Our steady growth over the past 10 years reflects our commitment to investing in our customers.

FOR MORE INFORMATION, VISIT US AT WWW.IDC.COM.

IDC
Analyze the Future

IDC is the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets. IDC helps IT professionals, business executives, and the investment community make fact-based decisions on technology purchases and business strategy. Over 850 IDC analysts in 50 countries provide global, regional, and local expertise on technology and industry opportunities and trends. For more than 42 years, IDC has provided strategic insights to help our clients achieve their key business objectives. IDC is a subsidiary of IDG, the world's leading technology media, research, and events company. You can learn more about IDC by visiting www.idc.com.

IDC Global Headquarters, 5 Speen Street, Framingham, MA 01701, P.508.872.8200 F.508.935.4015.

For a complete list of IDC's worldwide offices, visit www.idc.com/offices

CM_IDC_P6032_0606