Telecommunications Equipment

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *Telecommunications Equipment* service analyzes the opportunities and challenges of network infrastructure suppliers selling to all networking providers. This service focuses on the deployment of key network infrastructure products that provide enhanced IP services. Key technical transformations include the converged IP edge with MPLS services, Carrier Ethernet deployments, and the impact of IPTV and video distribution on edge and core networks. This service also covers the optical networking market segments in significant detail. Market share for all segments is also published. In addition to analyzing leading network equipment vendor products and strategies, IDC interviews leading service providers (SPs) to assess the rate of network convergence, supplier satisfaction, equipment opportunities, and technology directions to provide an inside view of future infrastructure opportunities.

Markets Covered

This service covers the following segments of the worldwide service provider market:

- Carrier Ethernet (routing and switching)
- SP routers (edge and core)
- Optical networking, including verticals
- Next-generation network (NGN) infrastructure
- Video infrastructure and trends
- Broadband access (xDSL, PON, and EADs)
- Wireless infrastructure
- Worldwide telecommunications equipment forecast by product segment
- Worldwide telecommunications equipment market share

Subjects Analyzed

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

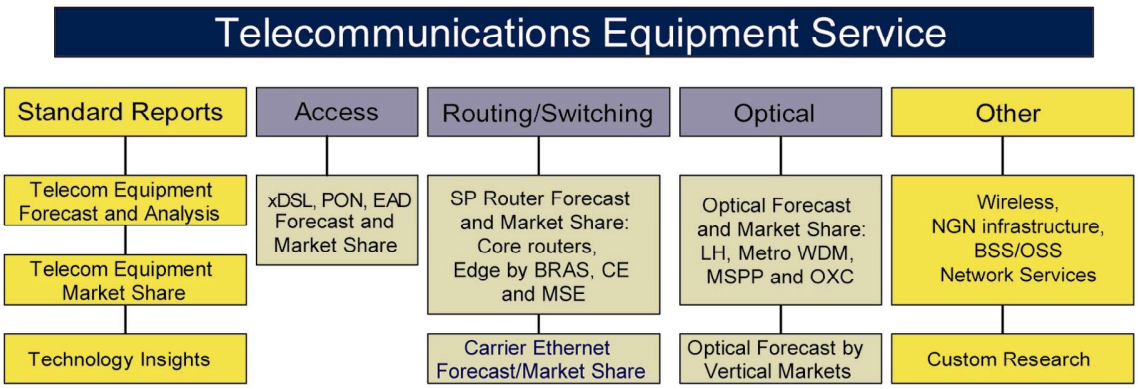
- Carrier Ethernet forecast and opportunities
- Service provider routers and the migration of Ethernet into the core networks
- Video distribution and its impact on network architectures
- Issues in optical networks
- Impact of Layer 2 and Layer 3 technologies on the network
- Technology crossover of the wireline and wireless infrastructure
- WiFi and WiMAX impacts on the broadband edge

Key Questions Answered

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

1. What effect will the datacenter vendors have on video distribution networks?
2. How and when will leading service providers converge their networks?
3. Who will win the new multiservice edge deployments?
4. What is the timeline for NGN VoIP deployments in wireline and wireless networks?
5. Which networking vendors are best positioned to increase market share among service providers in 2008 and 2009?

Service Provider Opportunity Model



Source: IDC

Companies Analyzed

IDC's *Telecommunications Equipment* service examines how infrastructure suppliers are positioning themselves to compete in the service provider market. This service reviews the strategies, market positioning, and future direction of infrastructure suppliers as well as their customers in this space:

Acinion, Adtran, ADVA, Alcatel, Alloptic, Allot, Atrato, Atrica, BigBand, Calix, Ciena, Corrigent, Cisco Systems, ECI, Ekinops, Espial, Ethos Networks, Ericsson, Extreme Networks, F5, Force10, Foundry Networks, Fujitsu, Gridpoint, Hatteris, Hammerhead, Harris, Hitachi, Huawei, Infinera, Juniper, Matisse Networks, Meriton, Motorola, MRV, NEC, NokiaSiemens, Nortel, OCCAM, OpVista, Redback, SeaChange, Sycamore, Spirent, Tejas, Tellabs, Transmode, Turin, Wave7, XKL, XO Communications, Zuegma, and ZTE.

Core Research

This service focuses on the following core research. In addition to the insight provided in this service, IDC may conduct additional research on specific topics, or emerging market segments, via research offerings that require additional IDC funding and client investment.

Carrier Ethernet Transport Opportunities
This document examines the opportunities for Carrier Ethernet and Optical Ethernet suppliers.

Worldwide Service Provider Spending on Network Infrastructure Forecast and Analysis
This study provides a worldwide forecast of overall network infrastructure consumption of service providers by region. Leading segments include routering, switching, optical networks, VoIP, wireless infrastructure, and OSS.

Worldwide Access Equipment Forecast and Analysis
This study forecasts the worldwide five-year revenue opportunity for xDSL PON and Ethernet Access equipment. IDC breaks down access equipment revenue by geographic region and technology.

Worldwide PON Equipment Forecast and Analysis
This study examines the five-year revenue opportunity for PON equipment, including broadband PON (BPON), Ethernet PON (EPON), and Gigabit PON (GPON) products. Additional information on PON deployments by region is detailed.

Optical Networking Opportunities
The evolution of optical networks from service provider deployments to enterprise private optical networks as well as new deployments to content providers is all in our optical coverage.

General Insights
Short pieces on technology trends in the market.

Telecom Equipment Market Share and Forecasts
Twice–a-year coverage of market share across all telecom segments is provided as well as a complete forecast and analysis of the telecom equipment market by four regional 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-plus years reflects our commitment to investing in our customers.

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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. More than 1,000 IDC analysts provide global, regional, and local expertise on technology and industry opportunities and trends in over 110 countries worldwide. For more than 43 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.

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