

Asia/Pacific NGN Telecommunications Services

AN IDC CONTINUOUS INTELLIGENCE SERVICE

Internet Protocol (IP)-based services such as broadband Internet access, IP VPN, IP TV and VoIP services are driving growth in the fixed-line telecommunications market in Asia/Pacific (excluding Japan). Consumers and enterprises alike continue to migrate from narrowband to broadband Internet access, with ongoing price wars amongst service providers to build market share. Asian service providers are developing more IP-based value-added services and applications to up-sell to their IP VPN and broadband customers, in addition to managed IP voice services such as Voice VPNs and IP Centrex. IDC's *Asia/Pacific NGN Telecommunications Services* research is essential to all IP players seeking a comprehensive knowledge of users' adoption behavior and plans, given that the positioning of solutions and marketing strategies will differ depending on deployment patterns.

Markets Covered

This service covers the following segments of the *NGN Telecommunications Services* market:

- IP VPN services
- VoIP services - voice over broadband, Voice VPNs, IP Centrex
- IP value-added services and applications
- Broadband Internet access - DSL, cable modem, metro Ethernet, fixed wireless access
- Narrowband Internet access - dial-up and leased line Internet access lines
- IP TV services
- IP service providers

Subjects Analyzed

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

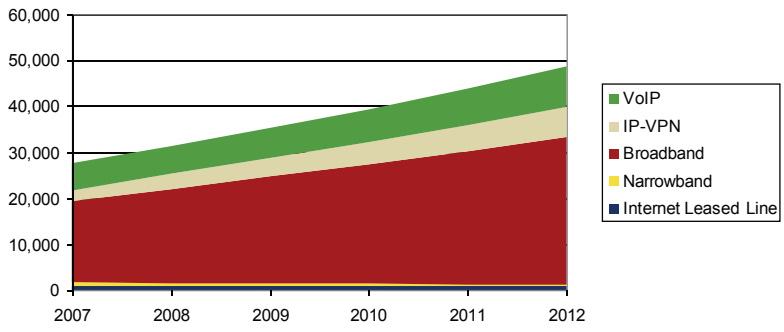
- Annual sizing and forecast of IP VPN and VoIP services by country
- Annual sizing and forecast of Internet access services by country
- Competitive analysis and positioning of IP service providers
- Annual end-user survey of IP services usage by consumer and enterprise demographic, country, vertical, and company size
- Annual sizing and forecast of IP TV services market

Key Questions Answered

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

1. How has the role of global service providers in the IP space changed?
2. What are the market opportunities of VoIP and IP VPN services among telcos and/or corporations?
3. What is the corporate usage of IP technologies and services in Asia/Pacific?
4. What are the market opportunities and outlook of Internet access services among corporations and consumers?

Asia/Pacific (Excluding Japan) IP Services Spending (US$ Million)



Source: IDC

Competitive Analysis

IDC's *Asia/Pacific NGN Telecommunications Services* research provides the profiles of vendors and service providers, including their organization structure, financial strengths, sales and marketing strategies, channels programs and a SWOT analysis. Examples of companies tracked include:

AAPT, AT&T, Bayantel, BSNL, CAT, C&W, China Telecom, China Unicom, Chunghwa Telecom, Digitel, EBT, Equant, Globe, Hanaro, Hutchison, Korea Telecom, Mackay, Maxis, MCI, MTNL, NTT, Optus, PACNET, PCCW, PLDT, Satyam, SingTel, SK Telecom, Sparq, Sprint, StarHub, Telekom Malaysia, Telstra, TFN, TOT, True, UCOMM, and VSNL.

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.

Asia/Pacific (Excluding Japan) IP VPN Services 2009-2013 Forecast and Analysis

This study provides a 5-year forecast of the market opportunities for IP VPN services and highlights the strategies adopted by providers to make their offerings financially attractive in the long-term.

Asia/Pacific (Excluding Japan) Internet Access Services 2009-2013 Forecast and Analysis

This study presents IDC's 2008 market sizing and 5-year forecast to 2013 for the Internet access services in Asia/Pacific, comparing narrowband and broadband service segments. The study highlights new developments, service offerings, technologies and players in this rapidly moving market. Key data points included are revenue, subscribers, and penetration, with a comparison of the business and consumer markets.

Asia/Pacific (Excluding Japan) Consumer Internet Survey 2008

This study looks at the deployment trends of consumers in the internet space, comparing take-up and trends from narrowband to broadband, as well as popularity and potential for emerging Internet-based value-added applications and services.

Asia/Pacific (Excluding Japan) Enterprise Survey 2009 of IP Usage and Preferences - Vertical Splits

IDC surveys medium and large corporations in 11 countries across Asia/Pacific on their IP network needs and future plans impacting the IP space. Companies are classified according to vertical industry to assess take-up and trends on an industry-by-industry basis. This report enables network vendors and service providers to understand the evolving IP communication needs of users in the region, their customer satisfaction levels, as well as expectations in terms of network and service requirements. It also incorporates users' perception of emerging technologies.

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 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 account manager.

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.

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. More than 1000 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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