European Business Network Services

AN IDC CONTINUOUS INTELLIGENCE SERVICE

IDC's *European Business Network Services* presents our analysis, sizing, and forecasting of the fixed-line business voice and data markets in Europe. It covers the network services markets from SMB up to multinational enterprise, including next-generation services based on IP and Ethernet as well as traditional fixed voice and data services. Primary end-user research is presented each year that reveals shifting business networking trends as well as informing our individual market forecasts. Our research helps companies in the business communications industry shape their corporate and product development strategies and pinpoint emerging opportunities.

Markets Covered

This service covers the following segments:

- Fixed-line business voice and data services
- Converged voice/data and fixed/mobile
- SOHO, SMB, enterprise, and MNC

Subjects Analyzed

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

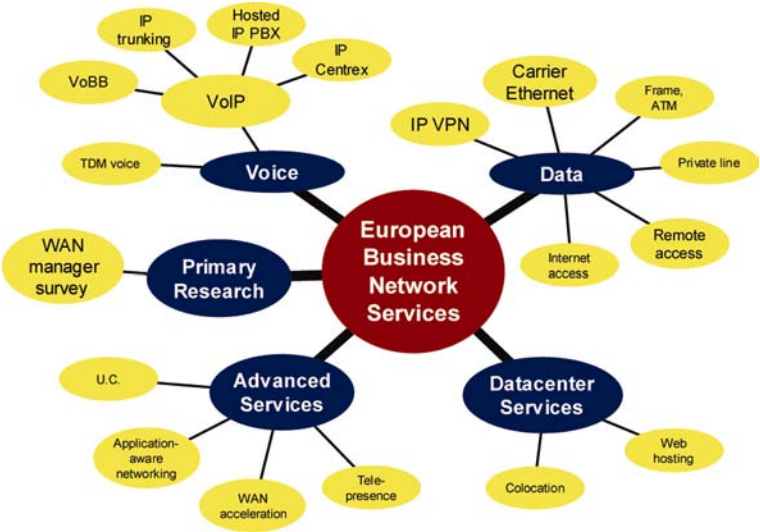
- IP telephony services such as hosted VoIP and IP trunking
- Traditional fixed-line telephony
- Next-generation IP and Ethernet business network services
- Traditional Layer 1 and Layer 2 services
- Internet access and remote access services
- Web hosting and colocation
- SME and enterprise behavior, requirements, and plans
- Advanced network applications such as unified communications, WAN optimization, application-aware networking, and telepresence

Key Questions Answered

This service addresses the following issues that are critical to your success:

1. What is the rate of migration from legacy to next-generation voice and data services?
2. How should emerging technologies and services be deployed for greatest effect?
3. What is the size of the opportunity for carrier Ethernet services?
4. What is the value to customers of converged services?
5. What network services do enterprises use today and how do they expect to evolve?
6. How can enterprise service providers address the SMB market?

Business Network Services in Europe



Source: IDC

Competitive Analysis

IDC's *European Business Network Services* examines how service providers are positioning themselves to compete in the fixed-line voice and data market. This service reviews strategies, positioning, and future direction of providers in the market, including:

Arcor, AT&T, Avaya, Belgacom, Azzurri, BT Global Services, Cable & Wireless, CallServe, Claranet, Cogent, COLT, Completel, Deutsche Telekom, Delta3, e-shelter, Easynet, eircom, Equinix/IXEurope, euNetworks, France Telecom, Global Crossing/Fibernet, Global Switch, Google, Interoute, Interxion, KPN, Level 3, Microsoft, Mitel, Neuf Cegetel, Net2Phone, ntl:Telewest Business, NTT/Verio, Ono, Orange Business Services, OTE, Portugal Telecom, Rackspace, Redstone Telecom, Reliance Globalcom/Vanco, Savvis, Sentrum, Skype, Sonaecom, Sprint, Swisscom, T-Systems, Tata Communications/Teleglobe, TDC, Tele2, Telecom Italia, TelecityRedbus, Telefónica, Telehouse, Telekom Austria, Telenor, TeliaSonera, Telstra International, Thus, Tiscali, Verizon Business, Vodafone, and Wind.

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:

Western Europe Carrier Ethernet Services, 2009–2013
Ethernet continues its ascendancy and is on track to become a dominant wide area network technology. This study sizes and forecasts the carrier Ethernet services market in Europe.

Western Europe IP VPN Services, 2009–2013
MPLS-based IP VPNs are the leading WAN service in Europe. This study sizes and forecasts the market and highlights current trends in this now-mature technology.

Western Europe Business VoIP Services, 2009–2013
Growth in VoIP services remains high and they are rapidly becoming the standard platform for telephony and advanced applications such as unified communications. This study analyzes the market for hosted VoIP services, IP trunking, and voice over broadband services in Europe.

European WAN Manager Survey, 2009
This study presents IDC's annual survey of around 650 WAN managers in 10 European countries, covering current and future use of WAN and VPN, fixed voice, VoIP, hosting, and convergence services.

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
- Complimentary/special admission price 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 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.

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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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