Japan Carrier Managed Services

AN IDC CONTINUOUS INTELLIGENCE SERVICE

It has become increasingly difficult for telecom carriers in Japan to maintain their customer base and remain profitable based solely on a network services business model. In order to expand and enhance their core businesses, carriers are expanding their managed services offering, as well as developing new on-demand services based on the flexible deployment of IT infrastructure and software solutions. Driven by the need for business continuity, disaster recovery, internal control, and more efficient operations and maintenance, demand for managed services is increasing rapidly. In addition, the need for IT infrastructure and Software-as-a-Service (SaaS) is critical for businesses that are just starting or expanding. IDC's *Japan Carrier Managed Services* presents a comprehensive overview of the carrier managed services market, and provides analysis of leading carriers' managed services offerings, as well as forecasts for key market segments up to 2013. In addition, this program analyzes the impact of network and IT convergence from the perspectives of both the carrier and enduser.

Markets Covered

This service covers the following segments of *the Japan carrier managed services* market:

- Enterprise users survey
- Competitive analysis
- Internet datacenter
- Security services
- Maintenance and operation of carrier services/solution services
- Contents Delivery Networks

Subjects Analyzed

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

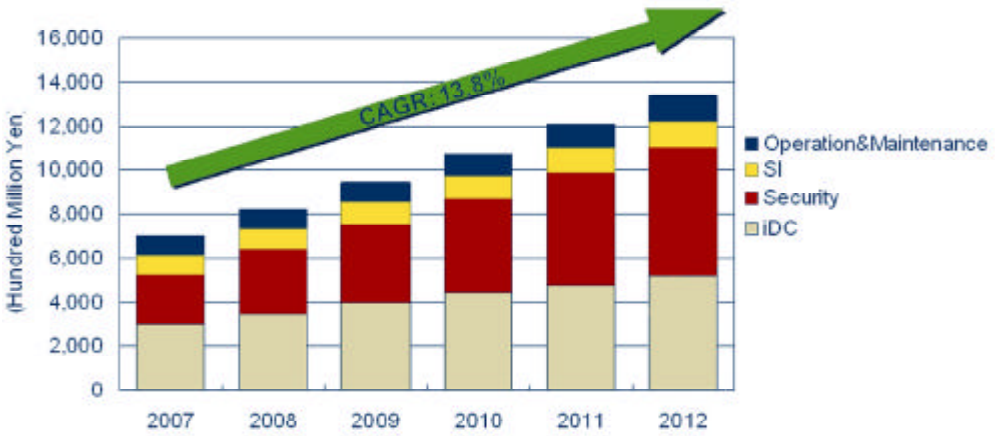
- End-users' demand
- Carriers' business strategies (alliances and product strategies)
- Carriers' competitive analysis
- Market forecast and key assumptions for the next five years

Key Questions Answered

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

1. What are the potential business opportunities for carrier managed services in Japan?
2. How can carriers improve their managed services businesses in Japan?
3. How will carriers, IT vendors, and system integrators interact to provide managed services in Japan?
4. Which new business models are capable of improving the quality of the Japan carrier managed services?
5. Which carrier managed services do enterprise users require the most?
6. Are there business opportunities for CDN (Contents Delivery Networks) once again as a network infrastructure of choice in delivering rich media and software?

Japan Carrier Solution / Managed Services:Overall Market Size and Forecast



Source: IDC

Competitive Analysis

IDC's *Japan Carrier Managed Services* examines how Japan carriers are positioning themselves to compete in the carrier managed services market. This service reviews strategies, market positioning, and future direction of several providers, including:

Akamai, Broadmedia, Internet Initiative Japan, J-Stream, KDDI, KVH, NTT Communications, NTT East, NTT West, Softbank Telecom, Usen, and others.

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.

Japan Managed Services User Survey 2009
This survey provides the usage trends of managed services as well as plans of enterprises to adopt advance telecommunications services.

Japan Carrier Solution/Managed Services 2009-2013 Forecast and 2008 Analysis
This study analyzes the entire telecom carriers' managed service usage and product/solutions portfolios, user requirements, and trends.

Japan Content Delivery Services Trend:Is it going to be an infrastructure of cloud computing?
This study analyzes the business models of CDN players in providing fast and flawless media and software delivery, and their future strategies to be a network infrastructure of cloud computing.

Japan Carrier Internet Datacenter 2009-2013 Forecast and 2008 Analysis
This study analyzes the managed data center equipment/ circuit/services market of Japan communications carriers and provides 2009-2013 forecasts.

Japan Carrier Security Services 2009-2013 Forecast and 2008 Analysis
This study analyzes the managed security services over each telecom service provided by the carriers.

Japan Managed Services Competitive Analysis, 2009
This study provides detailed competitive analysis of the major telecom carriers in Japan.

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
- Two complimentary admissions to IDC Japan'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.

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 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.

IDC Japan, 3rd Floor, Nihonjisho-Daiichi Building, 1-13-5 Kudankita, Chiyoda-ku, Tokyo 102-0073, Japan P.81-3-3556-4761 F.81-3-3556-4771

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