

**Broadband Strategies And Potential: Cisco, Broadcom,  
And Qualcomm Market Shares and Forecasts, Worldwide,  
2010 to 2016**

**Broadband Improves Network Functionality, Spurs Growth**



*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

**WinterGreen Research, Inc.  
Lexington, Massachusetts**

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**CHECK OUT THESE KEY TOPICS**

**Cisco**  
**Ethernet Switches**  
**Ethernet Routers**  
**Qualcomm**  
**CDMA**  
**Broadcom**  
**Broadband**  
**Routers**  
**Switches**  
**Telepresence**  
**3G phones**  
**Cellphones**  
**Internet**  
**IP TV**  
**Networking**  
**Strategy**  
**Broadband Opportunity**  
**Ethernet Strategy**  
**Net neutrality**  
**Broadband Market Shares**  
**Broadband Growth Strategy**

**Broadband Cellphone Applications**

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## **Broadband Strategies And Potential: Cisco, Broadcom, And Qualcomm Market Shares and Forecasts, Worldwide, 2010-2016**

LEXINGTON, Massachusetts (February 5, 2010) – WinterGreen Research announces that it has a new study on **Broadband Strategies And Potential: Cisco, Broadcom, And Qualcomm Market Shares and Forecasts, Worldwide, 2010-2016**. The 2010 study has 325 pages, 126 tables and figures.

Broadband market driving forces are articulated in part through the Internet on Ethernet networks and through wireless handsets. There are 4.7 billion wireless handset users. Cell phones have changed the world for ever, they are inexpensive, affordable to almost every person on earth. Broadband is bringing the Internet to cell phones.

Broadband brings a new world order, literally.

The three broadband leaders Cisco, Qualcomm and Broadcom illustrate the market strategies that work in this new world order. The ability to embrace broadband and make it work has been elusive to virtually every other company. Broadband market driving forces are a result of being able to provide services aggregation on the Internet. Performance, service capabilities, reliability, and efficiencies are being achieved in a compact form factor.

Cisco has seen very strong growth in the last quarter of 2009, exceeding its own optimistic expectations. Cisco saw very strong balanced growth perspective in almost all major geographic and market segment categories. While most markets around the world are improved, Cisco was especially pleased with product booking growth in the U.S. in Q4 2009, up 17% y/y. Based on business momentum in prior economic recoveries, this recovery, from a capital spending perspective, is very strong and moving into the second phase.

Key market transitions are being made relative to virtualization and video networking productivity and growth in network loads. These markets are set to evolve even faster than anyone has thought. Cisco, Qualcomm and Broadcom are positioned to leverage broadband market growth. These market participants continue to be very aggressive in both internal innovation commitments, as well as partnership and acquisition strategies.

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**According to Susan Eustis, President of WinterGreen Research, "Worldwide broadband markets are poised to achieve significant growth as broadband finds new uses and leverages existing ones. Costs of broadband devices are expected to decrease rapidly in response to the continuing economies of scale. Market strategies of the leaders Cisco, Qualcomm, and Broadcom are compelling in their innovation and flexibility"**

**Broadband network customers choose a Cisco platform to build critical BSS network because Cisco has the ability to deliver a total solution. There is a clear strategic roadmap that has been proven. Cisco is positioned as a valuable broadband technology partner. This is a crucial factor that contributes to Cisco big wins in the field, including the China Telecom deal. China Telecom selected Cisco over the competition. China Telecom is committed in optimizing its WAN infrastructure to support growing business demands.**

**Cisco broadband networks are efficient. The China Telecom project implementation started in October 2008 and was completed within 3 months. Cisco strategy centers on the increasing role of intelligent networks, collaboration and Web 2.0 technologies. The United States, Europe, China, India, and emerging countries are target markets. The network is the platform. Broadband depends on network resource management and realignment.**

**Cisco strategy is to expand its share of customer information technology spending. The focus is on core networking capabilities. It has a continuing effort to expand into product markets similar, related, or adjacent to those in which it is active.**

**Broadband markets are big. Ethernet routing and switching at \$22.6 billion in 2009 is anticipated to reach \$52.5 billion by 2016. 3G cellphone IC components markets at \$26.8 billion in 2009 are anticipated to reach \$52.7 billion by 2016. These forecasts for broadband segments indicate the growth that comes from worldwide market penetration of broadband.**

Keywords: Cisco, Qualcomm, Broadcom, broadband, CDMA routers switches, telepresence, 3G phones, cellphones, Internet, IP TV, networking, strategy, CDMA opportunity, Ethernet strategy, [http://wintergreenresearch.com/reports/Broadband\\_Growth.htm](http://wintergreenresearch.com/reports/Broadband_Growth.htm)

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## Companies Profiled

### Market Leaders

Broadcom  
Cisco  
Qualcomm

### Market Participants

Global Foundries

## Broadband Strategies And Potential: Cisco, Broadcom, And Qualcomm Market Shares and Forecasts, Worldwide, 2010 to 2016

### Report Methodology

This is the 437th report in a series of primary market research reports that provide forecasts in communications, telecommunications, the Internet, computer, software, telephone equipment, health equipment, and energy. Automated process and significant growth potential are a priorities in topic selection. The project leaders take direct responsibility for writing and preparing each report. They have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases.

The primary research is conducted by talking to customers, distributors and companies. The survey data is not enough to make accurate assessment of market size, so WinterGreen Research looks at the value of shipments and the average price to achieve market assessments. Our track record in achieving accuracy is unsurpassed in the industry. We are known for being able to develop accurate market shares and projections. This is our specialty.

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The analyst process is concentrated on getting good market numbers. This process involves looking at the markets from several different perspectives, including vendor shipments. The interview process is an essential aspect as well. We do have a lot of granular analysis of the different shipments by vendor in the study and addenda prepared after the study was published if that is appropriate.

Forecasts reflect analysis of the market trends in the segment and related segments. Unit and dollar shipments are analyzed through consideration of dollar volume of each market participant in the segment. Installed base analysis and unit analysis is based on interviews and an information search. Market share analysis includes conversations with key customers of products, industry segment leaders, marketing directors, distributors, leading market participants, opinion leaders, and companies seeking to develop measurable market share.

Over 200 in depth interviews are conducted for each report with a broad range of key participants and industry leaders in the market segment. We establish accurate market forecasts based on economic and market conditions as a base. Use input/output ratios, flow charts, and other economic methods to quantify data. Use in-house analysts who meet stringent quality standards. Interviewing key industry participants, experts and end-users is a central part of the study. Our research includes access to large proprietary databases. Literature search includes analysis of trade publications, government reports, and corporate literature.

Findings and conclusions of this report are based on information gathered from industry sources, including manufacturers, distributors, partners, opinion leaders, and users. Interview data was combined with information gathered through an extensive review of internet and printed sources such as trade publications, trade associations, company literature, and online databases. The projections contained in this report are checked from top down and bottom up analysis to be sure there is congruence from that perspective.

The base year for analysis and projection is 2009. With 2009 and several years prior to that as a baseline, market projections were developed for 2010 through 2016. These projections are based on a combination of a consensus among the opinion leader contacts interviewed combined with understanding of the key market drivers and their impact from a historical and analytical perspective. The analytical methodologies used to generate the market estimates are based on penetration analyses, similar market analyses, and delta calculations to supplement independent and dependent variable analysis. All analyses are displaying selected descriptions of products and services.

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This research includes referencde to an ROI model that is part of a series that provides IT systems financial planners access to information that supports analysis of all the numbers that impact management of a product launch or large and complex data center. The methodology used in the models relates to having a sophisticated analytical technique for understanding the impact of workload on processor consumption and cost.

WinterGreen Research has looked at the metrics and independent research to develop assumptions that reflect the actual anticipated usage and cost of systems. Comparative analyses reflect the input of these values into models.

The variables and assumptions provided in the market research study and the ROI models are based on extensive experience in providing research to large enterprise organizations and data centers. The ROI models have lists of servers from different manufacturers, Systems z models from IBM, and labor costs by category around the world. This information has been developed from WinterGreen research proprietary data bases constructed as a result of preparing market research studies that address the software, energy, healthcare, telecommunicatons, and hardware businesses.

**YOU MUST HAVE THIS STUDY**

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# Broadband Growth Market Shares, Strategies, and Forecasts, Worldwide, 2010-2016

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**WINTERGREEN RESEARCH**, RESEARCH STRATEGY RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY USING AUTOMATED ANALYSIS OF SOCIAL NETWORK MATERIALS, BLOGS, AND ELECTRONIC ANALYTICS, THE MARKET TRENDS ARE IDENTIFIED. ANALYSIS OF THE ELECTRONIC EQUIVALENT OF 50,000 FEET OF PAPER PERMITS WINTERGREEN RESEARCH SENIOR ANALYSTS TO LEARN A LOT MORE ABOUT MARKETS. THINKING ABOUT MARKET TRENDS IS A HIGH PRIORITY AT WINTERGREEN RESEARCH. AS WITH ALL RESEARCH, THE VALUE PROPOSITION FOR COMPETITIVE ANALYSIS COMES FROM INTELLECTUAL INPUT.

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