

**Carrier PreSelect (CPS) Services Market Opportunities,
Strategies, and Forecasts, 2004 to 2009**

Carrier PreSelect (CPS) Services



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

CHECK OUT THESE KEY TOPICS

CARRIER PRESELECTION (CPS) MARKET SHARES
CARRIER PRESELECTION (CPS) MARKET FORECASTS
Carrier PreSelect Eliminates Manually Dialing A Prefix
Advantages CPS Offers

Carrier Pre Select Innovations
Carrier Preselect Pricing
CPS REGIONAL ANALYSIS
DATA WAREHOUSE APPLIANCE
CARRIER PRE-SELECTION USES NETWORK ACCESS
TECHNOLOGY
CARRIER PRE SELECTION (CPS) MARKET DRIVING FORCES
CARRIER PRE-SELECT RESULT OF EUROPEAN DE-REGULATED
TELEPHONE CHARGES

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.
Lexington, Massachusetts
www.wintergreenresearch.com

Carrier PreSelect (CPS) Services Market Opportunities, Strategies, and Forecasts, 2004 to 2009

The markets for telecommunications services are changing dramatically. Carrier preselect (CPS) represents a way for retailers to package groups of wireline and wireless services and offer them to the existing retail customer base.

Worldwide CPS narrowband, broadband, and WiFi fixed wireless services market forecast analysis indicates that there will be a reasonably rapid shift away from narrowband to broadband and WiFi fixed wireless services. CPS represents a shift away from traditional telecommunications services providers to retail store packaging of groups of converged telephone voice and entertainment services. Communications services can be sold along with more traditional store products.

The CPS providers generally have less reason to use a particular network and are free to negotiate wholesale deals with different network providers. They represent a significant worldwide trend toward using retail contact with customers to sell communications services.

The CPS now being sold is narrowband wireline services. This will shift as wireless connectivity and voice over IP services are beginning to be sold as the primary communications lines.

CPS instructs BT or other national carriers to route calls via the CPS carrier network directly from the BT or national exchange without the need to program an access code in to the telephone system and without the need to install costly and auto-dialer equipment.

With expertise in telephone system programming CPS vendors connects clients to network via PBX programming rather than via CPS as this gives greater flexibility to alter routing and change carriers quickly as and when necessary. CPS is extremely useful for older systems which are not fully programmable, for clients that have had problems with "leakage" to BT using programming and for single direct lines such as fax machines or home workers.

Total CPS markets at \$189.9 million in 2003 are expected to reach \$4.6 billion by 2009.

Companies Profiled

Market Leaders

Carphone/Talk Talk
One Tel/Centrica

Market Participants

BDR Networks	British Sky Broadcasting
Caudwell Group	Eckoh Technologies/Symphony Telecom Limited
Kingston Communications	LowerCall
Maintel	MCI
Patapsco Communications	Rocket Connect
Sovereign Telecom	Tele2
Telegroup Switzerland	Tesco
Tiscali	Tspeak UK Ltd
Vocalis Telecom	

Carrier PreSelect (CPS) Services Strategies and Forecasts, 2004-2009

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND THIRTIETH* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, TELEPHONE EQUIPMENT, HEALTH EQUIPMENT, AND ENERGY. 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. 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 PARTICIPATION 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. OUR RESEARCH INCLUDES ACCESS TO LARGE PROPRIETARY DATABASES. LITERATURE SEARCH INCLUDES ANALYSIS OF TRADE PUBLICATIONS, GOVERNMENT REPORTS, AND CORPORATE LITERATURE.

YOU MUST HAVE THIS STUDY

Carrier PreSelect (CPS) Services Market Opportunities, Strategies, and Forecasts, 2004 to 2009

Table of Contents

CARRIER PRESELECT (CPS) SERVICES EXECUTIVE SUMMARY

CARRIER PRESELECT (CPS) SERVICES EXECUTIVE SUMMARY	ES-1
Carrier Pre Selection (CPS) Market Driving Forces	ES-1
Carrier Pre Selection (CPS) Market Shares	ES-4
Carrier Pre Selection (CPS) Market Forecasts Total	ES-5

CARRIER PRE-SELECT MARKET DESCRIPTION AND MARKET DYNAMICS

1. CARRIER PRE-SELECT MARKET DESCRIPTION AND MARKET DYNAMICS	1-1
1.1 Carrier Pre-Select Result of European De-Regulated Telephone Charges	1-1
1.1.1 Carrier Pre-Selection (CPS) Allows Choice Of Telecommunications Provider	1-4
1.2 Advantages CPS Offers	1-5
1.3 Carrier PreSelect Eliminates Manually Dialing A Prefix	1-6
1.4 Carrier Pre Select Innovations	1-7

CARRIER PRESELECT (CPS) SERVICES MARKET SHARES AND MARKET FORECASTS

2. CARRIER PRESELECT (CPS) SERVICES MARKET SHARES AND MARKET FORECASTS	2-1
2.1 Carrier Pre Selection (CPS) Market Driving Forces	2-1
2.1.1 Benefits Of Using Carrier Pre Select Service	2-4
2.1.2 Differences Between Bitstream Services And Unbundled Loops	2-5
2.2 Carrier Pre Selection (CPS) Market Shares	2-5
2.2.1 Tesco	2-10
2.2.2 Tiscali	2-10
2.2.3 Carphone / Talk Talk	2-10
2.2.4 Caudwell Communications	2-11
2.2.5 Selected Communications Providers Offering Carrier Preselect	2-11
2.2.6 Carrier Pre Selection (CPS) Market Shares -- Users	2-14
2.3 Carrier Pre Selection (CPS) Market Forecasts	2-17
2.3.1 Carrier Pre Selection (CPS) Market Forecasts Retail Wireline	2-18
2.3.2 Carrier Pre Selection (CPS) Market Forecasts Retail Wireless	2-21
2.3.3 Wireless Data Services	2-22
2.3.4 Alternatives to the Local Access Network	2-23
2.3.5 Carrier Pre Selection (CPS) Market Forecasts Wholesale	2-24
2.3.6 Wholesale Unbundled Access Acquirer	2-25
2.3.7 Wholesale Unbundled Access to Metallic Loops	2-26
2.3.8 Carrier Pre Selection (CPS) Market Forecasts Total	2-27
2.4 Carrier Preselect Pricing	2-29
2.4.1 TalkTalk	2-30
2.4.2 OneTel Pricing	2-30
2.4.3 Directory Enquiries	2-31
2.5 CPS Regional Analysis	2-32
2.5.1 International Telecom Carriers/Telcos	2-34

2.5.2	UK Different Non-Geographic Numbers	2-45
2.5.3	United Kingdom UK CPS	2-46
2.5.4	CPS in Switzerland	2-46
2.5.5	France	2-47
2.5.6	Emerging Markets	2-47
2.5.7	Germany Deutsche Telekom	2-48
2.5.8	Tele2operations in Eastern Europe and Russia	2-48
2.5.9	Nordic CPS	2-49
2.5.10	Sweden	2-49
2.5.11	Denmark, Norway and Finland	2-50
2.5.12	Eastern Europe & Russia	2-50
2.5.13	Central Europe	2-51
2.5.14	Southern Europe Market	2-52
2.5.15	Luxembourg	2-52
2.5.16	Netherlands	2-52
2.5.17	Dutch Broadband	2-53
2.5.18	Mobile Subscriptions In Sweden	2-54
2.5.19	Belgian Market	2-54
2.5.20	Ireland	2-55
2.6	Worldwide CPS Narrowband, Broadband, And WiFi Fixed Wireless Services Market Forecasts	2-56

CARRIER PRESELECT (CPS) SERVICES PRODUCT DESCRIPTION

3. CARRIER PRESELECT (CPS) SERVICES DESCRIPTION	3-1
3.1 Tesco	3-1
3.1.1 Tesco Talk 2 – Evenings & Weekends	3-4
3.1.2 Tesco Talk 3 – Anytime	3-4
3.1.3 Tesco Talk Features	3-4
3.2 Carphone Warehouse Talk Talk	3-6
3.2.1 TalkTalk	3-7
3.2.2 TalkTalk Phone Company Description	3-7
3.3 Centrica Telecommunications / One Tel	3-8
3.3.1 Directory Enquiries	3-9
3.4 Homecall	3-10
3.5 British Sky Broadcasting Group / Sky Talk	3-11
3.6 True Communications Carrier Preselect	3-13
3.7 Rocket Connect	3-14
3.7.1 Rocket Connect Call Routing - Network Call Centre Services	3-20
3.8 Patapsco Communications Liberator	3-21
3.9 TollBridge Technologies	3-22
3.10 Cable and Wireless	3-22
3.10.1 Cable & Wireless Call Types That CPS Does Not Apply To	3-24
3.10.2 Cable & Wireless Benefits of CPS	3-24
3.11 Solcon Telefonie	3-25
3.12 Lowercall	3-25
3.13 Maintel Voice & Data	3-29
3.13.1 Maintel Voice Data Carrier Pre-Select (CPS)	3-31
3.13.2 Maintel Voice Data Solutions	3-32
3.14 3U TELECOM B.V.	3-33
3.15 Telecoms World	3-33
3.15.1 Telecoms World Indirect Voice - Carrier Pre-Selection	3-35
3.16 Sovereign	3-35

WINTERGREEN RESEARCH, INC.

3.16.1	CPS from Sovereign Features Quality Of Service	3-37
3.17	Khameleon Telecom	3-39
3.17.1	Khameleon Preselected	3-40
3.18	Caudwell	3-41
3.19	Telegroup Spectra Switzerland	3-43
3.19.1	Spectra Carrier PreSelect	3-43
3.20	Tspeak	3-49
3.21	CCT	3-52
3.22	Wisesurfer	3-52
3.23	ASPIDER® Communications / Wellness Nederland	3-53
3.24	S&H Systems	3-53
3.25	Primus Spectra	3-54
3.25.1	Spectra Preselect	3-54
3.25.2	Primus customers	3-59
3.26	True Communications CPS	3-59
3.27	Empcom	3-61
3.28	iiPhone	3-63
3.29	Tele2	3-64
3.29.1	Tele2 Overall Aim	3-66
3.30	MCI Indirect Access Service	3-66
3.30.1	MCI Carrier PreSelect (CPS)	3-68
3.26	Kingston Communications Carrier Pre-Select Service	3-69
3.31	True Communications Least Cost Routing	3-70

CARRIER PRE-SELECT TECHNOLOGY

4. CARRIER PRE-SELECT TECHNOLOGY	4-1	
4.1	Carrier Pre-Selection Uses Network Access Technology	4-1
4.2	Data Warehouse Appliance	4-1

CARRIER PRESELECT (CPS) SERVICES COMPANY PROFILES

5. CARRIER PRESELECT (CPS) SERVICES COMPANY PROFILES	5-1	
5.1	BDR Networks	5-1
5.2	Carphone Warehouse	5-2
5.2.1	TalkTalk Distribution	5-4
5.2.2	Telecom Services	5-5
5.2.3	TalkTalk Proactive MVNO Strategy	5-7
5.2.4	TalkTalk	5-9
5.3	British Sky Broadcasting	5-9
5.3.1	British Sky Broadcasting Financial Review	5-12
5.3.2	British Sky Broadcasting Wholesale Revenues	5-13
5.3.3	Sky Active Revenues	5-13
5.3.4	Skybet Revenues	5-13
5.3.5	Third Party Channels	5-14
5.3.6	British Sky Broadcasting Corporate	5-14
5.4	Caudwell Group	5-17
5.4.1	Caudwell Communications / Homecall	5-17
5.5	Centrica / One.Tel	5-18
5.5.1	One.Tel / Centrica Telecommunications	5-19
5.6	Eckoh Technologies / Symphony Telecom Limited	5-22
5.7	Kingston Communications	5-23
5.7.1	Kingston Communications Carrier Pre-Select Service	5-23

5.8	LowerCall	5-25
5.9	Maintel	5-26
5.10	MCI	5-28
5.11	Patapsco Communications	5-28
5.12	Rocket Connect	5-30
5.12.1	Rocket Group	5-31
5.12.2	Rocket Avaya Gold Partners.	5-32
5.13	Sovereign Telecom	5-32
5.14	Tele2	5-34
5.15	Telegroup Switzerland	5-37
5.16	Tesco	5-37
5.16.1	Tesco Enters China Through A Joint Venture With Ting Hsin	5-38
5.16.2	Tesco UK's Largest Retailer	5-38
5.17	Tiscali	5-40
5.17.1	Tiscali Multicultural Team	5-41
5.17.2	Tiscali 1Q04 results	5-42
5.17.3	Tiscali Sells Swiss Subsidiary	5-45
5.17.4	Tiscali Sells Norwegian Subsidiary	5-45
5.18	Tspeak UK Ltd	5-45
5.19	Vocalis Telecom	5-46

List of Tables and Figures

CARRIER PRESELECT (CPS) SERVICES EXECUTIVE SUMMARY

Table ES-1	ES-3
Carrier Pre Selection (CPS) Market Driving Forces	
Figure ES-2	ES-5
Worldwide CPS Services Wireline and Wireless Market Shares, Dollars, First Half 2004	
Figure ES-3	ES-6
Worldwide CPS Services Wireline, Wireless, and Wholesale Market Forecasts, Dollars, 2004-2009	
Figure ES-4	ES-7
Worldwide CPS Services Wireline Market Forecasts, Dollars, 2004-2009	

CARRIER PRE-SELECT MARKET DESCRIPTION AND MARKET DYNAMICS

Table 1-1	1-3
Typical Customers Carrier Pre-Select Order Form	
Table 1-2	1-5
Carrier Pre-Selection (CPS) Advantages	

CARRIER PRESELECT (CPS) SERVICES MARKET SHARES AND MARKET FORECASTS

Table 2-1	2-3
Carrier Pre Selection (CPS) Market Driving Forces	
Table 2-2	2-4
Benefits Of Carrier Pre Select Service	
Figure 2-3	2-7
Worldwide CPS Services Wireline and Wireless Market Shares, Dollars, First Half 2004	

Figure 2-4	2-8
Worldwide CPS Services Wireline and Wireless Market Shares, Dollars, 2003	
Table 2-5	2-9
Carrier Preselect Retail Wireline and Wireless Revenue Market Shares, 2003 and First Half 2004	
Table 2-6	2-11
Communications Providers Offering Carrier Preselect	
Figure 2-7	2-14
Worldwide CPS Services Wireline and Wireless Market Shares, Users, First Half 2004	
Figure 2-8	2-15
Worldwide CPS Services Wireline and Wireless Market Shares, Users, 2003	
Table 2-9	2-16
Carrier Preselect Retail Wireline and Wireless Users Market Shares, 2003 and First Half 2004	
Table 2-10	2-17
Carrier Preselect Segments – Retail, Wholesale, Wireless Market Shares, 2003 and First Quarter 2004	
Figure 2-11	2-19
Worldwide CPS Services Wireline Market Forecasts, Dollars, 2004-2009	
Figure 2-12	2-20
Worldwide CPS Services Wireline Segment User Market Forecasts, Users, 2004-2009	
Figure 2-13	2-21
Worldwide CPS Services Wireless Market Forecasts, Dollars, 2004-2009	
Figure 2-14	2-22
Worldwide CPS Services Segment Wireless User Market Forecasts, Users, 2004-2009	
Figure 2-15	2-25
Worldwide CPS Services Wholesale Market Forecasts, Dollars, 2004-2009	
Figure 2-16	2-28
Worldwide CPS Services Wireline, Wireless, and Wholesale Market Forecasts, Dollars, 2004-2009	
Table 2-17	2-29
Worldwide CPS Services Wireline, Wireless, and Wholesale Market Forecasts, Dollars, 2004-2009	
Table 2-18	2-31
Talk Talk Pricing	
Figure 2-19	2-32
Regional CPS Services Segment Market Analysis, Dollars, First Half 2004	
Table 2-20	2-33
Regional CPS Services Segment Market Analysis, Dollars, First Half 2004	
Table 2-21	2-34
International Telecom Carriers / Telcos	
Table 2-22	2-40
Global Consortiums and Industry Associations	
Table 2-23	2-41
Dutch Telecom Carriers/Telcos And Their Products	
Table 2-24	2-45
UK Non-Geographic Numbers	
Figure 2-25	2-57
Worldwide CPS Narrowband Services Market Forecasts, Users, 2004-2009	
Figure 2-26	2-58
Worldwide CPS Narrowband Services Market Forecasts, Dollars, 2004-2009	
Figure 2-27	2-59
Worldwide CPS Broadband Services Market Forecasts, Users, 2004-2009	
Figure 2-28	2-60
Worldwide CPS Broadband Services Market Forecasts, Dollars, 2004-2009	
Figure 2-29	2-61
Worldwide CPS WiFi Fixed Wireless Services Market Forecasts, Users, 2004-2009	

Figure 2-30	2-62
Worldwide CPS WiFi Fixed Wireless Services Market Forecasts, Dollars, 2004-2009	
Table 2-31	2-63
Worldwide CPS Services Segment Narrowband, WiFi Fixed Wireless, and Broadband Market Forecasts, Dollars, 2004-2009	

CARRIER PRESELECT (CPS) SERVICES PRODUCT DESCRIPTION

Table 3-1	3-3
Tesco Talk 1 – Pay As You Go Features	
Table 3-2	3-5
Tesco Talk Features	
Table 3-3	3-6
TalkTalk Services Advantages	
Table 3-4	3-12
British Sky Broadcasting Group Sky Talk Benefits	
Table 3-5	3-14
True Communications Communications Functions Offered	
Table 3-6	3-16
Rocket Connect Unique Number Uses	
Table 3-7	3-17
Rocket Connect Management Report Facilities Functions	
Table 3-8	3-18
Rocket Connect Call Functions	
Table 3-9	3-18
Rocket Connect Call Features	
Table 3-10	3-20
Rocket Connect Platforms	
Table 3-11	3-26
lowercall.com Steps To Enable CPS	
Table 3-12	3-27
lowercall.com Calls Options	
Table 3-13	3-28
LowerCall Tariffs Minimum Call Cost	
Table 3-14	3-30
Maintel Voice & Data Services Benefits	
Table 3-15	3-32
Maintel Voice Data Solutions	
Table 3-16	3-34
Telecoms World 3 Types Of Call Options For Carrier Preselect Service	
Table 3-17	3-36
Sovereign CPS Positioning	
Table 3-18	3-40
Khameleon Telecom Positioning	
Table 3-19	3-44
Telegroup Spectra Carrier PreSelect Conditions:	
Table 3-20	3-45
Telegroup Spectra Carrier PreSelect Systems	
Table 3-21	3-46
Telegroup Spectra Rates	
Table 3-22	3-50
Tspeak Call Options:	

WINTERGREEN RESEARCH, INC.

Table 3-23	3-51
Tspeak Call Pulsing	
Table 3-24	3-55
Spectra Preselect Features	
Table 3-25	3-56
Primus Spectra CPS Rates	
Table 3-26	3-60
True Communications CPS Positioning	

CARRIER PRESELECT (CPS) SERVICES COMPANY PROFILES

Table 5-1	5-10
British Sky Broadcasting Long-term growth Strategy Is As Follows:	
Table 5-2	5-11
British Sky Broadcasting Positioning:	
Table 5-3	5-27
Maintel Voice And Data Customers	
Table 5-4	5-31
Rocket Connect CPS Positioning	

ABOUT THE COMPANY

WINTERGREEN RESEARCH, HAS A UNIQUE RESEARCH STRATEGY THAT RELATES TO IDENTIFYING MARKET TRENDS THROUGH READING AND INTERVIEWING OPINION LEADERS. BY READING THE ELECTRONIC EQUIVALENT OF 40 FEET OF PAPER, WINTERGREEN RESEARCH SENIOR ANALYSTS CAN LEARN A LOT MORE ABOUT MARKETS, A LOT FASTER THAN CAN BE LEARNED THROUGH EXPENSIVE SURVEYS AND FOCUS GROUPS. 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.

IT IS A LUXURY REALLY, AVAILABLE TO ONLY A VERY FEW PEOPLE, TO BE ABLE TO GATHER INFORMATION, LOTS OF INFORMATION FROM READING MASSIVE AMOUNTS OF CONTENT, AND THEN TRYING TO MAKE SENSE OF THAT CONTENT. THE ABILITY TO THINK ABOUT MARKET TRENDS IS ENHANCED BY DOING IT OVER AND OVER FOR MANY DIFFERENT MARKETS. THAT IS WHAT WINTERGREEN RESEARCH IS ALL ABOUT: READING AND THINKING IS AN ESSENTIAL ASPECT OF COMPETITIVE ANALYSIS. TALKING TO OPINION LEADERS IS THE THIRD ESSENTIAL ASPECT OF PRODUCING GOOD, RELIABLE DATA.

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, INTERNET AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT EXPAND EXISTING MARKETS OR DEVELOP MAJOR NEW MARKETS. THE REPORTS ASSESS NEW PRODUCT AND SERVICE POSITIONING STRATEGIES, NEW AND EVOLVING TECHNOLOGIES, AND TECHNOLOGICAL IMPACT ON PRODUCTS, SERVICES, AND MARKETS. MARKET SHARES ARE PROVIDED. LEADING MARKET PARTICIPANTS ARE PROFILED, AND THEIR MARKETING STRATEGIES, ACQUISITIONS, AND STRATEGIC ALLIANCES ARE DISCUSSED. THE PRINCIPALS OF WINTERGREEN RESEARCH HAVE BEEN INVOLVED IN ANALYSIS AND FORECASTING OF INTERNATIONAL BUSINESS OPPORTUNITIES IN TELECOMMUNICATIONS AND ADVANCED COMPUTER TECHNOLOGY MARKETS FOR OVER 30 YEARS.

ABOUT THE PRINCIPAL AUTHORS

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE HAS THE ORIGINAL PATENTS IN ELECTRONIC VOTING MACHINES. SHE HAS NEW PATENT APPLICATIONS IN FORMAT VARYING, MULTIPROCESSING, AND ELECTRONIC VOTING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, BIOMETRICS, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, WEB SERVICES, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

WINTERGREEN RESEARCH, INC.

ORDER FORM

Return To: WinterGreen Research, Inc.
6 Raymond Street
Lexington, MA 02421 USA
Phone: (781) 863-5078 --- Fax: (781) 863-1235 or (781) 860-0897

PLEASE ENTER MY ORDER FOR:

**Carrier PreSelect (CPS) Services Market
Opportunities, Strategies, and Forecasts
2004-2009**

-ALL REPORTS ARE AVAILABLE IN EITHER PRINT OR PDF-

PDF

PRINT

___ ENCLOSED IS MY CHECK FOR \$2,800 FOR SINGLE COPY, \$3,800 FOR WEB SITE POSTING

___ PLEASE BILL MY COMPANY USING P.O. NUMBER _____

___ PLEASE CHARGE MY MASTERCARD/VISA/AMERICAN EXPRESS___

CARD NUMBER _____ EXP. DATE _____

If charging to a Credit card you may e-mail the order form, but not the card information

Fax or Call with credit card information - Do not send card number as e-mail - You may send the order as e-mail

___ ADDITIONAL COPIES, @ \$375 (EXTRA COPY PRICE IN EFFECT ONLY WITH INITIAL ORDER)

NAME _____ TITLE _____

SIGNATURE _____

COMPANY _____ DIVISION _____

-

ADDRESS _____

CITY _____ STATE /

ZIP _____

TELEPHONE _____

FAX _____

EMAIL _____

PLEASE NOTE: RESIDENTS OF MASSACHUSETTS AND CONNECTICUT MUST INCLUDE APPROPRIATE SALES TAX

SUBSCRIBERS OUTSIDE THE UNITED STATES MUST PROVIDE PREPAYMENT IN U.S. FUNDS

REPORT # SH29821368

197 PAGES

67 TABLES AND FIGURES

2004

\$2,800