

WINTERGREEN RESEARCH, INC.

**CWDM Market Opportunities, Strategies, and Forecasts,
2003 to 2008**

CWDM



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

REPORT # SH29821308

255 PAGES

71 TABLES AND FIGURES

2003

\$2,800

CHECK OUT THESE KEY TOPICS

CWDM MARKET SHARES
CWDM MARKET FORECASTS
WHY CWDM?

Transparent Metro DWDM Equipment

CWDM Market Conditions
Optical-to-Electrical Conversion
DWDM SYSTEM COMPONENTS

CARRIER GRADE DWDM

CWDM vs DWDM

TYPICAL DEPLOYMENT OF CWDM/DWDM SYSTEMS

CWDM MARKET DESCRIPTION

MARKET CHALLENGES

BROADBAND OPTICAL SERVICES

RAPID INCREASE IN BANDWIDTH DEMAND

REDUCED PROVISIONING TIME

ENABLING ETHERNET NETWORK COMPUTING PROTOCOLS

OPPORTUNITY ABOUNDS

WinterGreen Research, Inc.

Lexington, Massachusetts

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CWDM Market Opportunities, Strategies, and Forecasts, 2003 to 2008

Coarse CWDM systems are positioned as offering less expensive transport than dense DWDM technology and sufficient capacity for many edge network and enterprise network applications. CWDM systems deliver enough bandwidth for multiple metro applications DWDM systems deliver more bandwidth than CDWM but are more expensive than CWDM. DWDM systems cost \$32,000 per port per node. CWDM systems cost 30 to 40 percent lower than DWDM at \$12,000 per port per node.

Metro applications do not require the capacity that DWDM systems do. They require more space and power than CWDM. CWDM systems are available with relatively small numbers of channels and low cost. Space and price are key differentiators. 80-watt power is lower than a light bulb.

CWDM growth opportunities relate to implementing storage solutions, backup solutions, and CWDM metro transport. CWDM transport solutions platforms are expanding functionality to include access capability. In this manner access and transport markets are merging for the metro markets.

With the growth of the Internet, demand for high bandwidth continues to increase. The ability to increase transport capacity is needed universally. High bandwidth is needed to improve productivity and increase supply chain efficiency. Metro markets are shifting as the prices for laser components come down. Optical micro components promise to include more integrated functionality, at less cost per component, increasing the efficiency of DWDM systems.

CWDM brings innovative technologies to the broadband market. Platforms are evolving that extend transmission systems into access, supporting the engagement of multiple value added services on CWDM platforms. There is a convergence of transmission and digital loop carrier platform technology.

In metropolitan areas, in New York City, D.C. and any of the other major trading areas, real estate is the biggest expense. Small physical size, low heat consumption are big issues in metro deployments. CWDM markets at \$51 million in 2002 are expected to reach \$271.6 million by 2008.

Companies Profiled

Market Leaders

Nortel Networks
Alcatel
Ciena
Lucent Technologies
Siemens

Other Market Participants

ADVA Optical	Huawei
Agilent Technologies	Lightbit
Avici Systems	Lumentis
Avonex	Manticom Networks
Cisco	Marconi
Corning	NEC
ECI Telecom	Optical Micro-Machines
Ericsson	PacketLight
Fujitsu Optical Transport Solutions	Sorrento
Hewlett Packard	Sycamore Networks
JDS Uniphase	Telect
	Tellabs

CWDM Market Strategies and Forecasts, 2003-2008

REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND FIRST* REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, AND TELEPHONE EQUIPMENT. 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.

YOU MUST HAVE THIS STUDY

CWDM Market Opportunities, Strategies, and Forecasts, 2003 to 2008

Table of Contents

CWDM EXECUTIVE SUMMARY

CWDM EXECUTIVE SUMMARY	ES-1
CWDM Market Description	ES-1
CWDM Growth Opportunities	ES-2
CWDM Market Shares	ES-4
CWDM Market Forecasts	ES-6

CWDM DYNAMICS AND MARKET DESCRIPTION

1. COARSE WAVELENGTH DIVISION MULTIPLEXING CWDM MARKET DYNAMICS AND MARKET DESCRIPTION	1-1
1.1 Market Challenges	1-1
1.2 Broadband Optical Services	1-4
1.2.1 DWDM Applications	1-7
1.3 Why CWDM?	1-8
1.3.1 Ongoing Industry Adjustment	1-8
1.3.2 CWDM Market Dynamics	1-9
1.3.3 Wave Division Multiplexing (WDM)	1-10
1.3.4 CWDM Platform Systems	1-11
1.3.5 Metro Markets	1-12
1.3.6 Challenges of Telecommunications Network	1-14
1.3.7 Market Conditions	1-15
1.3.8 More Efficient To Put Together A Telecommunications Network	1-15
1.3.9 Delay In Spending For Capital Equipment	1-15
1.3.10 Capital Spending Decreasing	1-16
1.4 Transparent Metro DWDM Equipment	1-17
1.4.1 Increase In Data Traffic On The Public Network	1-19
1.4.2 Existing Public Network Transmission Infrastructure	1-20
1.5 Enabling Ethernet Network Computing Protocols	1-21
1.6 Rapid Increase In Bandwidth Demand	1-22
1.7 CWDM Market Conditions	1-24
1.7.1 Optical Systems Require Miniaturized Products	1-26
1.7.2 Ring Architecture	1-27
1.8 Reduced Provisioning Time	1-29

CWDM MARKET SHARES AND MARKET FORECASTS

2. CWDM MARKET SHARES AND MARKET FORECASTS	2-1
2.1 CWDM Market Description	2-1
2.2 CWDM Growth Opportunities	2-2
2.3 CWDM Market Shares	2-5
2.3.1 DWDM / CWDM Metro Market Shares	2-8
2.4 Metro DWDM and CWDM Market Forecast, Dollars	2-13

2.4.1	Service Provider Ethernet Technology	2-15
2.5	Metro DWDM and CWDM Market Forecast, Dollars and Ports	2-17
2.6	CWDM and DWDM Regional Analysis	2-25

CWDM PRODUCT DESCRIPTIONS

3. CWDM PRODUCT DESCRIPTION		3-1
3.1	Nortel Networks CWDM	3-1
3.1.1	CWDM and Nortel OPTera Metro 5000 platform	3-1
3.1.2	Nortel Scalable Hybrid CWDM Solution:	3-2
3.1.3	Nortel OPTera Metro 5100 CWDM	3-2
3.1.4	Nortel Networks Targets CWDM to Services Providers, Enterprises	3-6
3.1.5	Nortel CWDM Blades	3-7
3.1.6	Nortel OPTera Metro 1000	3-8
3.1.7	Nortel Optical Networks	3-13
3.2	Alcatel 1692 Metro Span Edge CWDM System	3-15
3.2.1	Alcatel 1696 Metro Span (Metro DWDM)	3-18
3.2.2	Alcatel 1660 SM Optical Multi-Service Node Integrates CWDM	3-18
3.2.3	Alcatel Packet Ring	3-20
3.3	Lucent Metro Optical	3-21
3.3.1	Lucent Metropolis	3-22
3.3.2	Lucent Metropolis® Enhanced Optical Networking (EON)	3-24
3.3.3	Lucent Optical Networking Products	3-25
3.4	Siemens / ADVA Scalable Enterprise Solution	3-26
3.4.1	Coarse WDM	3-28
3.5	Siemens	3-28
3.5.1	Siemens SURPASS hiT 75xx Series	3-29
3.6	ADVA Scalable CWDM Enterprise Solution	3-29
3.6.1	Service Provider ADVA FSP 500	3-30
3.7	Advanced Fiber Communications	3-33
3.8	White Rock Networks	3-34
3.8.1	White Rock Networks Flexible, Block-By-Block Architecture	3-35
3.9	Lumentis Technology Combines DWDM and CWDM	3-36
3.10	Fujitsu Limited	3-36
3.10.1	Fujitsu Flashwave® 7410	3-37
3.10.2	Fujitsu Storage Area Networking	3-40
3.10.3	Fujitsu Wavelength Services	3-40
3.10.4	Fujitsu Multi-service Access	3-41
3.11	Huawei	3-41
3.12	NEC	3-42
3.13	Ciena	3-48
3.13.1	Ciena ONLINE™ Edge Multiservice CWDM Platform	3-49
3.14	Cisco Metro Positioning	3-52
3.14.1	Cisco CWDM GBIC/SFP Solution	3-52
3.14.2	Cisco CWDM GBIC/SFP Deployment Scenarios	3-54
3.14.3	Cisco CWDM OADMs:	3-58
3.14.4	Cisco CWDM and DWDM	3-61
3.14.5	Cisco Router Architecture And Market Position	3-63

CWDM TECHNOLOGY

4. CWDM TECHNOLOGY	4-1
4.1 Optical-To-Electrical Conversion	4-1
4.1.1 Chromatic Dispersion	4-1
4.1.2 Optical Channels: CWDM vs DWDM	4-3
4.2 DWDM System Components	4-4
4.2.1 WDM Standards	4-6
4.3 Enterprise Services and Metro Access Requirements	4-8
4.4 Carrier Grade DWDM	4-11
4.5 CWDM vs DWDM	4-13
4.6 Typical Deployment of CWDM/DWDM Systems	4-16

CWDM COMPANY PROFILES

5. METRO DWDM COMPANY PROFILES	5-1
5.1 ADVA Optical	5-1
5.1.1 Adva Global Marketing Strategy	5-2
5.1.2 Adva Solutions	5-2
5.1.3 Adva Strategic Alliances	5-3
5.1.4 Adva Regional Focus	5-3
5.1.5 ADVA Product Positioning	5-5
5.1.6 ADVA Business Model	5-5
5.1.7 ADVA Optical Networking Revenues	5-5
5.1.8 ADVA Coarse Wavelength Division Multiplexing (CWDM)	5-6
5.1.9 ADVA Optical Networking	5-6
5.1.10 ADVA Market Topography	5-7
5.1.11 ADVA Focus On Storage Network And Ethernet-Based Technology	5-7
5.2 Agilent Technologies	5-8
5.3 Alcatel	5-8
5.3.1 Alcatel VND Division Markets Digital Loop Carrier (DLC) Multi-Service Access Solutions	5-9
5.3.2 Fourth Quarter Business Update:	5-10
5.3.3 Alcatel Participation In Communications Network Equipment Markets	5-12
5.3.4 Alcatel Metro DWDM	5-12
5.3.5 Alcatel and Optics	5-15
5.3.6 Alcatel and Tellabs / Sprint DWDM Metro Equipment	5-17
5.3.7 Alcatel Fiber Optic Submarine Cable Repair	5-18
5.4 Avici Systems	5-19
5.4.1 Avici Systems Research And Development	5-19
5.5 Avonex	5-20
5.6 Ciena	5-20
5.6.1 BT / Ciena Strategic Partnership	5-21
5.6.2 Ciena / WaveSmith Networks	5-22
5.6.3 Ciena Revenue	5-22
5.6.4 Ciena Acquires ONI Systems	5-23
5.7 Cisco	5-23
5.7.1 Cisco Acquisitions and Investments	5-24
5.7.2 Cisco Strategic Alliances	5-24
5.8 Corning	5-24
5.8.1 Corning Low-Loss Optical Fiber	5-25
5.8.2 Corning Telecommunications Segment	5-26
5.9 ECI Telecom	5-27
5.9.1 ECI Telecom Revenue	5-28

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5.9.2	ECI Telecom Customers	5-29
5.9.3	ECI Telecom Next-Generation Intelligent Optical and Transmission Solutions	5-30
5.10	Ericsson	5-31
5.10.1	Ericsson Partners	5-32
5.10.2	Ericsson Positioning	5-32
5.10.3	Ericsson 3G Positioning	5-34
5.10.4	Ericsson CDMA	5-34
5.10.5	Ericsson Wi-Fi	5-35
5.10.6	Ericsson Mobile handsets	5-36
5.10.7	Ericsson Broadband Access Unit Fibre-To-The-Home	5-36
5.10.8	Ericsson / Marconi Partnership	5-38
5.11	Fujitsu Optical Transport Solutions	5-39
5.11.1	Fujitsu DWDM	5-40
5.11.2	Fujitsu Network Communications Optical Transport Solutions	5-41
5.12	Hewlett Packard	5-42
5.12.1	Hewlett Packard Positioning	5-42
5.12.2	Blade Server Positioning Leverages Optical Networks	5-43
5.12.3	HP Blade Server Partner Program	5-44
5.12.4	Hewlett Packard / Compaq	5-44
5.13	JDS Uniphase	5-44
5.14	Huawei	5-45
5.14.1	Huawei Global Operations	5-46
5.14.2	Huawei ADSL Positioning	5-47
5.15	Lightbit	5-48
5.15.1	Lightbit WaveXchange™ Operating At Speeds Of 10Gb/s And Greater	5-49
5.15.2	Lightbit Next Generation DWDM Transmission Systems	5-50
5.16	Lucent Technologies	5-50
5.16.1	Lucent Service Provider Network Positioning	5-51
5.16.2	Lucent Optical Networking	5-52
5.16.3	Lucent Service Provider Network Positioning	5-53
5.16.4	Lucent Technologies Strategic Positioning	5-54
5.16.5	Business Forces Driving Change For Lucent	5-55
5.16.6	Lucent Metro Optical Solutions	5-56
5.16.7	Lucent Digital Loop Carrier	5-57
5.16.8	Lucent High Density Multi-Service Access Platform	5-59
5.16.9	Lucent AnyMedia® Access System	5-61
5.17	Lumentis	5-62
5.17.1	Lumentis Architecture	5-63
5.17.2	Lumentis Eliminating Amplifiers	5-63
5.17.3	Lumentis Performance and flexibility	5-64
5.17.4	Lumentis Dynamic Networking	5-65
5.17.5	Lumentis CWDM and DWDM	5-66
5.17.6	Lumentis Storage market	5-66
5.17.7	Lumentis Funding	5-67
5.18	Manticom Networks	5-67
5.19	Marconi	5-68
5.19.1	Marconi Revenue	5-68
5.19.2	Marconi Customers	5-70
5.19.3	Marconi Financial Restructuring	5-70
5.20	NEC	5-72
5.20.1	NEC Solutions (America)	5-73
5.20.2	NEC USA	5-74

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5.20.3	NEC Long Haul Submarine DWDM Systems	5-74
5.20.4	NEC Integration Of Computers And Communications	5-75
5.20.5	NEC Handsets	5-76
5.20.6	NEC Handset Customers	5-77
5.20.7	NEC Third Quarter Revenue Of The Fiscal Year Ending March 31, 2002	5-77
5.20.8	NEC Networks	5-78
5.20.9	NEC Solutions (America)	5-81
5.21	Nortel Networks	5-81
5.21.1	Nortel Product Development	5-83
5.21.2	Nortel Core Business Segments	5-84
5.21.3	Nortel Optical Networks	5-84
5.21.4	Nortel Strategic Alliances And Acquisitions	5-86
5.21.5	Nortel Service Optical Networks Vision Of Framework	5-86
5.21.6	Nortel Networks Ethernet Over DWDM	5-87
5.21.7	Nortel Surviving The Downturn	5-88
5.21.8	Nortel Networks Corporate Strategy	5-89
5.21.9	Nortel Customers	5-91
5.21.10	Nortel Product Differentiation	5-91
5.22	Optical Micro-Machines	5-92
5.23	PacketLight	5-93
5.23.1	PacketLight Networks Access Platform	5-94
5.24	Sycamore Networks	5-94
5.25	Sorrento	5-95
5.25.1	Sorrento Networks Revenue First Quarter Fiscal 2004	5-96
5.25.2	Sorrento Customers	5-96
5.25.3	Sorrento Networks Transport Of Video-On-Demand Services	5-96
5.26	Telect	5-97
5.27	Tellabs	5-97
5.27.1	Tellabs Customers	5-98
5.27.2	Tellabs Products	5-98
5.27.3	Tellabs Financials	5-99
5.27.4	Tellabs Optical Networking Products	5-102
5.27.5	Tellabs Next -Gen SDH and Managed Access Systems	5-102

List of Tables and Figures**CWDM EXECUTIVE SUMMARY**

Table ES-1 CWDM Growth Opportunities	ES-2
Figure ES-2 Worldwide CWDM Market Shares, Dollars, First Half 2003	ES-5
Figure ES-3 Worldwide CWDM Market Forecasts, Dollars, 2003-2008	ES-8

CWDM MARKET DYNAMICS AND MARKET DESCRIPTION

Table 1-1 Enterprise CWDM Broadband Optical Services Applications	1-5
Table 1-2 Enterprise CWDM Broadband Optical Target Markets	1-5
Table 1-3 Enterprise CWDM Broadband Optical functions	1-6
Table 1-4 DWDM Applications	1-7
Table 1-5 DWDM Service Breadth	1-19
Table 1-6 Optical Fiber Systems Efficient Operation Functions	1-26

CWDM MARKET SHARES AND MARKET FORECASTS

Table 2-1 CWDM Growth Opportunities	2-2
Table 2-2 Market Advantage Achieved by Sustainable Product Offerings	2-4
Figure 2-3 Worldwide CWDM Market Shares, Dollars, 2002	2-5
Table 2-4 CWDM Market Shares, Worldwide, 2002	2-6
Figure 2-5 Worldwide CWDM Market Shares, Dollars, First Half 2003	2-7
Table 2-6 CWDM Market Shares, Worldwide, First Half 2003	2-8
Figure 2-7 Worldwide Metro DWDM Market Shares, Dollars, 2002	2-9
Table 2-8 Metro DWDM and CWDM Market Shares, Worldwide, 2002	2-10
Figure 2-9 Worldwide Metro DWDM Market Shares, Dollars, First Half 2003	2-11
Table 2-10 Metro DWDM Market Shares, Worldwide, First Half 2003	2-12
Figure 2-11 Worldwide Metro DWDM Market Forecasts, Dollars, 2003-2008	2-14

Figure 2-12	2-15
Worldwide CWDM Market Forecasts, Dollars, 2003-2008	
Figure 2-13	2-18
Worldwide CWDM Market Forecasts, Ports, 2003-2008	
Figure 2-14	2-19
Worldwide Metro DWDM Market Forecasts, Ports, 2003-2008	
Table 2-15	2-20
Worldwide Metro DWDM and CWDM Market Forecasts, Dollars, 2003-2008	
Table 2-16	2-21
Worldwide DWDM Market Forecasts, Ports, 2003-2008	
Table 2-17	2-22
Worldwide Metro DWDM and CWDM Market Forecasts, Ports, 2003-2008	
Table 2-18	2-26
Worldwide DWDM Market Forecasts, Percent, By Region, 2003-2008	
Table 2-19	2-27
Worldwide DWDM Market Forecasts, Dollars, By Region, 2003-2008	

CWDM PRODUCT DESCRIPTIONS

Table 3-1	3-3
Nortel OPTera Metro 5100 CWDM Key Features:	
Table 3-2	3-4
Nortel OPTera Metro 5100 CWDM Benefits	
Table 3-3	3-9
Nortel OPTera Metro 1000 Key Features	
Table 3-4	3-10
Nortel OPTera Metro 1000 Features and Benefits	
Table 3-5	3-11
Nortel OPTera Metro Modules	
Table 3-6	3-16
Alcatel 1692 Metro Span Edge CWDM System Key Features	
Table 3-7	3-17
Alcatel 1692 Metro Span Edge CWDM System Key Benefits	
Table 3-8	3-21
Lucent Metro Optical Solutions Positioning	
Table 3-9	3-22
Lucent Metro Metropolis Solutions	
Table 3-10	3-23
Lucent Metro Customer Positioning	
Table 3-11	3-38
FLASHWAVE 7410 platform Features	
Table 3-12	3-39
Fujitsu FLASHWAVE 7410 system CWDM Support	
Table 3-13	3-43
NEC CWDM Applications	
Table 3-14	3-44
NEC CWDM Applications Benefits	
Table 3-15	3-46
NEC CWDM Point Of Presence (POP) Positioning	
Table 3-16	3-50
Ciena CWDM Features	

Table 3-17	3-53
Cisco CWDM Key Features and Benefits	
Table 3-18	3-56
Cisco CWDM GBIC Product Information	
Table 3-19	3-57
Cisco CWDM SFP Product Information	
Table 3-20	3-59
Cisco CWDM OADM Type Comparison	
Table 3-21	3-60
Cisco CWDM OADM Product Information	
Table 3-22	3-64
Cisco IP Communications System Components	
Table 3-23	3-67
Cisco AVVID Architecture	
Table 3-24	3-68
Cisco Service Control	
Table 3-25	3-69
Cisco Support for convergence of media types	

CWDM TECHNOLOGY

Table 4-1	4-4
DWDM Systems Components	
Table 4-2	4-9
Requirements For Metro Access Technology	
Table 4-3	4-12
Carrier Grade DWDM Features	
Table 4-4	4-13
DWDM and CDWM Features	
Table 4-5	4-15
Premise, Metro and Core CWDM and DWDM System Implementations	
Table 4-6	4-16
Basic Differences Between a CWDM and a DWDM System	
Table 4-7	4-17
Basic Similarities Between A CWDM Or DWDM System	

CWDM COMPANY PROFILES

Table 5-1	5-14
Alcatel Metro DWDM Positioning	
Table 5-2	5-16
Alcatel Terrestrial Optical Networking Strategy	
Table 5-3	5-17
Alcatel Submarine Optical Networking Strategy	
Table 5-4	5-31
ECI Telecom Products	
Table 5-5	5-43
HP Ecosystem Of Compatible Blade Server Products	
Table 5-6	5-56
Business Forces Driving Change	
Table 5-7	5-58
Lucent Broadband Access Solutions	

Table 5-8	5-58
Lucent Broadband Digital Loop Carrier Positioning	
Table 5-9	5-60
Lucent AnyMedia Access System Family of Products	
Table 5-10	5-83
Nortel Product Development	
Table 5-11	5-85
Nortel Optical Networks DWDM Competitive Issues	

ABOUT THE COMPANY

WINTERGREEN RESEARCH, FOUNDED IN 1985, PROVIDES STRATEGIC MARKET ASSESSMENTS IN TELECOMMUNICATIONS, COMMUNICATIONS EQUIPMENT, HEALTH CARE, AND ADVANCED COMPUTER TECHNOLOGY. INDUSTRY REPORTS FOCUS ON OPPORTUNITIES THAT WILL 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.

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