

WINTERGREEN RESEARCH, INC.

**Worldwide Telecommunications and Communications  
Market Opportunities, Strategies, and Forecasts, 2005 to 2010**

**Worldwide Telecommunications and Communications**



*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

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

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**CHECK OUT THESE KEY TOPICS**

*WORLDWIDE TELECOMMUNICATIONS MARKET GROWTH*  
*WORLDWIDE TELECOMMUNICATIONS AND COMMUNICATIONS EQUIPMENT*  
*MARKET FORECASTS*

**Worldwide Telecommunications Markets**  
**Competitive Structure Of The Carrier Market**

Enterprise Market Characteristics

Voice Infrastructure Market

*OPEN STANDARDS*

***SPECIFIC ABSORPTION RATE (SAR) OF A MOBILE PHONE***

***EGPRS (EDGE)***

***IP WITHIN CDMA***

***BLUETOOTH***

***COMMUNICATIONS NETWORKING INDUSTRY***

***IP TELEPHONY***

***CHANGE IN TELECOMMUNICATIONS NETWORK ARCHITECTURE***

***CONVERGED NETWORK REVOLUTION***

***TOP 10 TELECOMMUNICATIONS PROVIDER SHIPMENTS***

***OPPORTUNITY ABOUNDS***

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## **Worldwide Telecommunications and Communications Market Opportunities, Strategies, and Forecasts, 2005 to 2010**

The worldwide telecommunications markets are set for extraordinary growth, doubling from \$123 billion in 2004 to \$282 billion by 2010. Communications represents opportunity for expansion of economies. The Internet based communications systems are vastly improving the efficiency of the supply chain for the largest 5000 companies worldwide.

The combination of voice, video, and data on a network makes people more efficient. More information can be communicated not in real time, but is available, as people need it. Messaging systems play a significant role in passing information asynchronously, just in time.

Underdeveloped countries use communications to achieve trading and exchange of goods. As people have portable communications devices, they want more things and can make an economy emerge where there was none before. A Siemens representative tells about putting a refrigerator size switch in a rural South African village and coming back 10 years later to find a thriving village with shops and civilization. When people were coming and going to the city of Johannesburg, they would carry goods in both directions, creating demand for more items. Trade went in both directions from the village to the city and from the city to the village.

The uncertainty in the telecommunications markets has been resolved. Digital, IP, Ethernet will replace all other protocols. The convergence of networks is to IP, the Internet, Ethernet. It works seamlessly, it is reliable, it is resilient, it is fast. Now the issue is how fast the TDM networks will be replaced with the new technology.

Wireless is everything. 3G base stations promise to coexist with WiMAX 802.16 base stations in metro environments.

Worldwide telecommunications and communications equipment market forecasts, shipments in dollars analysis indicate strong growth in very large existing markets. Markets at \$197.6 billion in 2005 are anticipated to reach \$446.9 billion by 2010.

## Companies Profiled

### Market Leaders

Nokia  
Motorola  
Siemens

### Market Participants

Alcatel  
Cisco Systems  
Fujitsu  
Intel  
NEC  
Samsung

Avaya  
Ericsson  
Huawei Technologies  
Lucent Technologies  
Nortel  
UT Starcom

# Worldwide Telecommunications and Communications Strategies and Forecasts, 2005-2010

## REPORT METHODOLOGY

THIS IS THE *TWO-HUNDRED AND THIRTY-SEVENTH* 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**

# Worldwide Telecommunications and Communications Market Opportunities, Strategies, and Forecasts, 2005 to 2010

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**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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