

WINTERGREEN RESEARCH, INC.

**Network Outsourcing Market Opportunities, Strategies,
and Forecasts, 2005 to 2011**

Network Outsourcing



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

www.wintergreenresearch.com

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CHECK OUT THESE KEY TOPICS

NETWORK OUTSOURCING MARKET SHARES

NETWORK OUTSOURCING MARKET FORECASTS

Network Outsourcing Market Driving Forces

Network Systems Integration Definitions

Networking Solutions Need To Change and Adapt
Managed Internet Services

CONVERGED NETWORK REVOLUTION

CARRIER GRADE NEXT GENERATION NETWORK

TELECOM MARKET STRUCTURE

MARKET ENVIRONMENT AND STRATEGIC DIRECTION

CHANGE IN TELECOMMUNICATION NETWORK ARCHITECTURE

NETWORK OUTSOURCING SMART NETWORKS

INTERNET AS A MASSIVE, CRITICAL COMMUNICATIONS NETWORK

DIGITAL LOOP CARRIER (DLC) NETWORK NODES

NETWORK OUTSOURCING SERVICES PROVIDED

TYPES OF NETWORK OUTSOURCING COMPANIES

OPPORTUNITY ABOUND

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Mission Critical Messaging Middleware Market Opportunities, Market Forecasts, and Market Strategies, 2005-2011

Enterprises are achieving a focus on core competencies. They seek to make their infrastructure more flexible; they seek to introduce services that let people manage the business intelligently. They seek to make the supply chain more efficient and to exchange information with partners. The enterprise seeks to manage IT infrastructure efficiently while reducing complexity. Enterprise network outsourcing is evolving in this context.

Service providers are faced with the need to converge their existing voice and data networks onto a single, packet-based network to meet the increasing demand from end users for fast and seamless communication. Convergence is complicated; it will happen across multiple layers; applications, infrastructures and back-office environments and will involve multiple components.

Network outsourcing is positioned to apply technology innovation for continuous improvement. Access expertise and infrastructure are part of the network outsourcing story. Network outsourcing is positioned to Improve return on technology investment (ROTI) through consolidation of assets and functions.

Network outsourcing provides a service level agreement – a guarantee to keep the infrastructure at a certain level. Network consulting is positioned for the building of resilient enterprise networks. Companies can realize network management of a new dimension of the types of risks and vulnerabilities that are possible in business. They need to plan for a range of events that can include man-made occurrences or natural disasters.

Network outsourcing is the taking over of the network and running it according to an SLA. The SLA is measurable and represents a very rich portfolio services. It may be a more targeted strategic prepackaged system to solve client pain points that are a roadmap addressing specific issue.

Service providers need to build the capacity for net services that leverage the opportunity brought by broadband. Services implementation depends on network flexibility and cost reductions.

Network outsourcing customer success depends on the evolution of their business models and their networks. Network outsourcing is taking place in this context. Services providers in the network outsourcing business have employees dedicated to professional services, managed services, deployment services and maintenance services. Services organizations maintain a direct sales force that supplements the sales effort from the global sales organization.

Planning, design, optimization, integration and management services are critical to simplifying convergence and empowering service providers to bring profitable lifestyle-changing services to end users, while driving increased revenues.

Network outsourcing markets at \$28.7 billion in 2004 are expected to grow significantly through out the forecast period to \$70 billion by 2011.

Companies Profiled

Market Leader

IBM
SBC/AT&T

Market Participants

Alcatel	Avaya
BellSouth	Cap Gemini
Cisco Systems	Deutsch Telekom T-Systems
Electronic Data Systems Corporation (EDS)	Ericsson
Fujitsu	Hewlett-Packard (HP)
Huawei Technologies	i2
Intel	Lucent Technologies
Motorola	NEC
Nokia	Nortel
Samsung	Siemens
UT Starcom	Verizon Communications

Mission Critical Messaging Middleware Strategies and Forecasts, 2005-2011

REPORT METHODOLOGY

THIS IS THE 258TH 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

Network Outsourcing Market Opportunities, Strategies, and Forecasts, 2005 to 2011

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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.

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