

WINTERGREEN RESEARCH, INC.

**Next Generation Network (NGN) Market Opportunities,
Strategies, and Forecasts, 2006 to 2012**

Next Generation Network (NGN)



Picture by Susie Eustis

MOUNTAINS OF OPPORTUNITY

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

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CHECK OUT THESE KEY TOPICS

NGN REVENUE GENERATING MEDIA SERVICES
VOICE-OVER-PACKET (VOP) MARKET
Softswitch / Media Gateway Market Forecasts
Service Provider NGN Systems

Network Service Needs
Increasing Average Revenue Per User (ARPU)
IMPACT OF COMPETITION
WIRELESS NETWORKS
MARKET GROWTH DYNAMICS
CONVERGED VOICE AND DATA NETWORKS
STRATEGIES TO IMPROVE PERFORMANCE
MARKET MAKERS
IP TELEPHONY SERVICE SOLUTIONS
MARKETING GLOBALLY
OPEN STANDARDS
EGPRS (EDGE)

OPPORTUNITY ABOUND

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Next Generation Network (NGN) Market Opportunities, Market Forecasts, and Market Strategies, 2006-2012

Sonus had significant customer wins with leading Internet service providers. It extended leadership in core VoIP markets as measured by minutes of use - 15 billions minutes per month, representing 40% of global VoIP minutes.

Cisco and Italtel joint solution platforms are deployed in production networks handling over 43,400 million minutes/month of live traffic (over 520 Billion Minutes/Year), with about 6.8 millions ports controlled by i-SSW. More than 26 customers have selected the Cisco and Italtel joint solutions in 15 different countries.

Siemens Surpass NGN overlay solutions offer best-in-class technology that reduces operational expenses and grows profits, lowering total cost of ownership. Surpass optimizes return on investment through feature richness, high-performance, scalable networking solutions.

Nortel next generation network business continuity solutions work with high-speed connections to mirror sites for added security, and redundancy. Business continuity and disaster recovery projects link offsite operations centers with central business district headquarters using a high-speed networks.

Alcatel next generation networks (NGN) are positioned to implement voice over DSL products enable service providers to offer small office, home office and business customers a complete communications solution. High-speed data is offered plus up to 16 voice lines over a single DSL line.

Huawei is a strong participant in the voice-over-packet equipment market. Huawei has a 15 percent share of the market, with 1.98 million ports shipped in the first quarter, behind Nortel's 22.9 percent share, or 3.29 million shipments

Service providers are engaged in figuring out how to offer revenue generating media services. Price erosion in legacy voice services is accelerating as VoIP services become free or very inexpensive. The equipment vendors and system integrators are looking at new services that would drive their business with the service providers.

Users are looking at services and solutions that would make them function efficiently in a globalized and competitive business environment. Transformation to NGNs is an evolution. Service providers are cautious over technical obstacles associated with NGNs. A rapid evolution of the industry is anticipated to follow a range of trials in various aspects of the business.

All the legacy networks need softswitches as they transform to NGNs. This transformation depends on the emergence of a foolproof NGN that can provide even better, if not equal, performance than the legacy circuit switched networks.

Incumbent operators seek to control costs and cap investment in TDM technology. Developing new services to attract and retain customers is a priority. Major service provider needs and requirements coming from the market are:

The new market entrants like Google in San Francisco and with GoogleTalk, Yahoo in Japan, E Bay with Skype, and Disney with initiatives to reach consumers directly with content are potential and real competitors to the incumbent service providers. Though the incumbent service providers may wish to preserve their existing investment, they are wrong. Market forces will make them move faster than they are comfortable to move to instantiate new network systems that are broadband and IP based.

The systems need to scale, they need to manage media in combination with data and voice. The systems need to be leading edge. The systems need to incorporate the wireless component of the communications infrastructure.

Companies Profiled

Market Leaders

Siemens
Nortel

Market Participants

ADVA Optical Netorking
Avaya
Ericsson
Hitachi
Italtel
Motorola
Samsung
Tekelec

Alcatel
Cisco Systems
Fujitsu
Huawei Technologies
Lucent Technologies
NEC
Sonus
UT Starcom

Next Generation Network (NGN) Strategies and Forecasts, 2006-2012

REPORT METHODOLOGY

THIS IS THE 267TH 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

Next Generation Network (NGN) Market Opportunities, Strategies, and Forecasts, 2006 to 2012

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