



Picture by Susie Eustis

Value Added Telecom Services Markets: Strategic Positions Market Forecasts

***E-commerce
E-services / Video
Applications
ATM / Frame Relay
ADSL / Cable
Unified Messaging
Internet Growth***

Convergence Voice and Data

Network Core / Edge

Wire Speed

**Market Forecasts 2000 to
2005**

Market Strategies:

Carrier
Cable TV
Enterprise
Internet ISP
Appliances
New Provider
E-Businesses
E-Services
Value Added

Worldwide Value Added Services Markets:

**[Applications Systems / Messaging VPNs](#)
[ATM, ADSL, Frame Relay,](#)
[Application Servers / Cable Modems](#)**

The Study Addresses These Issues:

- ***Identify high growth Internet value added services market segments***
- ***Driving forces in value added services markets***
- ***Trends in value added markets***
- ***Role of applications services providers***
- ***E-commerce and e-services as market driving forces***

➤ *How carriers are positioning*

➤ *How servers are used by industry*

COMPANIES PROFILED

**Advanced TelCom
Ameritech
AT&T
Bell Atlantic
BellSouth
British Telecom
Cable & Wireless
China Telecom**

**Equant NV
GST Telecom
ICG / Iridium
Telecom Italia
Level3
MCIWorldcom/Uunet
Netcom / NTT
Omnipoint / SBC**

**Sprint
Telemar (Brazil)
US West / Qwest
Verio/ Vodafone
WIC Connexus
Wind / WISH**

Report Outline -- EXECUTIVE SUMMARY

E-commerce issues
Supply chain issues
Tag switching

Personal location services
Enterprise voice and video
Video infrastructure

Fast access ADSL
Cable Modem

1. CARRIER VALUE ADDED SERVICES MARKET DESCRIPTION

Value added opportunities
Carriers system architecture
Voice and data
Content hosting
Building brand loyalty
System monitoring
Equipment vendor mergers

Carrier consolidation
End-to-end Internet solutions
Rapid, flexible deployments
ATM applicaitons
Carrier business strategy
Internet service provider
ISP business strategy

Systems management
Outsourcing
ADSL / SDSL
Cable modems
Frame relay
Virtual private networks

2. CARRIER VALUE ADDED SERVICES MARKET FORECASTS

Overview / Industry Growth
Net traffic / Driving forces
Carriers / Enterprise / Client
Market Variables / Summary
Market driving forces
Internet market profile
Internet users / Traffic,

Internet purchases, hosts
Market thrusts
Data Services
Frame Relay, ATM services
ADSL, XDSL services
T1, DS3, Messaging VPNs
Internet Application servers

Industry Analysis
Financial / Helathcare / Travel
/ Videoconferencing
Video on Demand
Interactive Games
Books / Music

3. US SERVICE PROVIDER VALUE ADDED SERVICES

RBOC / Ameritech / SBC
Bell Atlantic / BellSouth
US West / Qwest
GTE Network Services
Interactive Services Group
AT&T / IBM global
Core Business Strategy
AT&T Cellular Network
Sprint / Motorola
MCI/Worldcom
On-Net Services
Data Services / ATM Services
Managed Services

Bell Canada (Canada)
Newer U.S. Carriers Nationwide
voice and data
Advanced Telecom Group
Cable & Wireless
Customers from the Internet
Backbone Solutions
Central Texas
Global Crossing
GST/ IXC Communications
Level 3 / MediaOne
MCI Worldcom
Omnipoint / Verio

Province of New Brunswick
Western International
ISP / Uunet / GST
InterconX / Suburban Cable
Microsoft corporate network
Airlines / Enterprise / Delta
Automotive / Telematics
Research and Education
Missouri Network
New York State Network
U.S. Postal Service
Transportation Department
DSL Services

Convad / DSLnetworks, Satellite / Iridium

4. . EUROPE AND ASIA SERVICE PROVIDER VALUE ADDED SERVICES

BT (United Kingdom)	UK-Based Development	Korea Telecom
Belgacom (Belgium)	Vodafone / Hanson Quarry	Mahanagar Telephone Nigam
BroadNet / Bulgaria	Internet Service Providers	/ Singapore Telecom
Cable & Wireless	i-21 Future Communication	Taiwan Internet2
Deutsche Telekom	Wish / ISP Netherlands	Zhengzhou
Digital Island	Energy providers / Wind	Telecommunications Bureau
Eastern Europe	VALUE ADDED IN ASIA /	Zhejiang Mobile
Equant / Esprit Telecom	China Post / China Telecom	LATIN / SOUTH / OTHER
France Télécom (France)	China Unicom	Argentina / COTAS
Global One	DDI / IDO of Japan	Impsat / Teletulua Telecom
Post und Telekom Austria	Indian State Government	Venezuela CANTV
Qwest Communications Xlink	NTT DoCoMo	Middle East Mobile Systems
Internet Service	Interpath Communications	TELEMAR (Brazil)
Teledanmark (Denmark)	Hanaro Telecom	United Arab Emirates
Telia (Sweden)	Hypercom	
Trans-European Network	Hong Kong Telecom	

5. SERVICE PROVIDER VALUE ADDED COMPANY PROFILES

6. VALUE ADDED SERVICES TECHNOLOGY

Internet technology	Prioritizing Traffic / QoS	Third Generation Wireless
Fore / GEC customer base	E-commerce Enabling	3 G Mobile Communications
Network Ctrl / Smart cards	Multilayer Switches	Universal Mobile (UMTS)
Middleware Messaging	HDTV / Voice eXtensible	Personal location / GSM
Billing / Microbilling	VXML / Distributed Systems	
Flat fee / Prepaid wireless	1394 Firewire / Open	

List of Tables and Figures Forecasts for Services by Type & Industry

Market Shares / Forecasts, 1999-2004 Value Added Services/ Servers / ATM /

Services Segments / ISP, Carrier, Enterprise	Frame Relay / ATM / ADSL / xdsl / T1 / DS3
Internet Service Providers (ISPs) /	Messaging VPNs / Internet Application servers
Worldwide Revenue for Data Communications	Industry Analysis / Financial / Healthcare
Backbone Internet and Voice Traffic	Travel / Videoconferencing / Video on Demand
Market Driving Forces	Interactive Games / Books / Music
Tag Switching Scaling The Internet	BellSouth Value Added / SBC ATM Switching
Personal Location / BellSouth Value Added	AT&T Digital / MCI Managed / Bell Canada
Value Added Services Summary	WIC Connexus / InterconX / BT Applications
Strategic Alliance / Telecom Service Data	Cable & Wireless / Deutsche Telekom
Circuit Switched Migration	Tag switching / Scalability / WISH Broadband
ATM Backbone / Network Solutions	China Post/ COTAS / Fore / Billing Issues VXML
Network Value Added Applications	/ Third generation / Personal Location Voice Data
Target Markets For Enterprise ATM	/ Networking Group
Benefits Of Enterprise ATM	Enterprise / Carrier / Small / Medium Business
Target Markets For Converged Voice And Data	Carriers / ISP / ASP / Value-Added Resellers
Types Of Carriers / Provider Market Positioning	Applications Networking / Changing Market
Solutions Supported By ADSL / Broadband	Internetworking / Any-to-Any Networking
Internet market profile / Users / Traffic Purchases	Mission-Critical / Long Distance / Routing /
/ Hosts / Market Thrusts	Access / Cable / Headend / Development

REPORT METHODOLOGY

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This is the thirty seventh in a series of market forecasts of communications, telecommunications, Internet, and computer and telephone equipment. Value added services are key to Internet growth. The project leaders have significant experience preparing industry studies, having written over 300. Forecasts are based on primary research and proprietary data bases. In-depth interviews are conducted with key vendor, users, and opinion leaders provided insight about how value added services will evolve. Analysis of market directions that provide focus is based on an understanding of the issues and the market opportunities.

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

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