2010

MARKET RESEARCH AGENDA

Open Source Software Impacts on Telecom Services 2010-2015

www.insight.corp.com/reports/open10.asp

In the coming decade, open source software will significantly impact how telecom carriers create, deploy, manage, and bill for new services. The revenue models for open source software-based commercial offerings are becoming increasingly mainstream, and telecom carriers' specific requirements for network service components that are highly-available, reliable, scaleable, and extensible are being met through new innovations in open source software architectures.

In this study, Insight looks at how open source packages fit into carrier-class operations. We examine the various types of telecom organizations that are trialing open source and the impacts that this software will have on "traditional" telecom software vendors (ISVs), including those that provide components for IP networks (softswitches, application servers, and gateways). We forecast telecom open source software driven revenue related to the creation of new services, and carrier investment in open source platforms including commercial right-to-use licenses, consulting, and support across all service markets.

Enterprise Telecommunications Services and HFC Networks 2010-2015

www.insight-corp.com/reports/enterprise10.asp

This report will be essential reading for a wide range of providers offering telecom services to the enterprise and small business. Commercial telecom services have traditionally been the exclusive province of telcos, but that is changing. While the large cable MSOs HFC networks pass over 80 percent of businesses in the US, the CableCos' share of the commercial services market is less than two percent. The opportunity appears obvious and, indeed, every major cable operator is targeting commercial services as their top growth priority over the next five years.

This report examines how MSOs are leveraging their existing networks—built primarily to transport broadcast video services—to support commercial telecommunications services for the enterprise and small business. We survey a representative number of MSOs, telcos, and enterprise customers, and tell how the various carriers are addressing the needs of the enterprise and small business customer. We provide forecasts of spending for hardware and network services to provide various types commercial services, and on the enterprise side we forecast how fiber optics, wireless access, and digital transmission is augmenting demand for such services.

Web 2.0, Mobility and Fixed Line Applications: The Revolution in New Applications Development 2010-2015

www.insight-corp.com/reports/web2010.asp

The ubiquity of Internet access has created a new set of technologies and business models known as "Web 2.0"—and it has already made significant changes to fixed line and wireless application development and deployment. We believe the application of Web 2.0 to telecommunications will be the most significant change to the industry since the introduction of the public Internet, significantly accelerating adoption of new applications.

Pure IP-based services like Magic Jack and Skype challenge the traditional market for "fixed" communication services by delivering equivalent service without a traditional fixed line. The arrival of 3G and 4G combined with intelligent mobile devices will present challenges and opportunities. The ability to truly separate the applications from the network afforded by broadband IP networking will produce a surge in innovation.

This report explores the implications of the convergence of fixed line, mobile broadband, and Web 2.0. We describe the technologies for application development and deployment, the capabilities of mobile devices and networks, and how they change the game for users, operators, and application developers. We project markets for apps and discuss the impact of a Web 2.0 application deployment model on network operators.

Telecommunications and Capital Investments 2010-2015: Looking Beyond the Financial Crisis

www.insight-corp.com/reports/investments10.asp

The world is in the grip of a financial recession that has shaken the global economic system to its foundation. But what is the consequence for the telecom sector? After all, telecommunications and the Internet are now vital platforms, underpinning trade, industry, finance, and personal communications worldwide.

Services are coming under pricing pressure and margins are eroding, which in turn will affect investment in infrastructure and new technology. Will the credit crunch derail investments in NGNs and converged services? Does the dot-com bust earlier in the decade provide clues for the way forward? Furthermore, how will OEMs fare during the economic maelstrom, where are the opportunities for operators, what are the risks, and which operators are best equipped to weather the crisis?

This report explores the impact of the financial crisis on the telecom sector in quantitative terms, especially on capital investments such as optical equipment and fiber and Ethernet and Sonet equipment. The focus of the analysis will be on operators in North America, key EU member states, and select Asian countries.

THE INSIGHT RESEARCH CORPORATION

The 2010 Insight Market Research Agenda

Private Line and Wavelength Services 2010-2015

www.insight-corp.com/reports/pl10.asp

Converged solutions using VoIP and MPLS are driving the demand for local private lines. In addition, we are forecasting continued demand for wireless backhaul. Overall, the market for high speed point to point circuits will remain moderately positive through the forecast period. This report will also provide an update on the status of new copper technologies and their deployment vis-à-vis the more traditional fiber private line solutions.

Does the demand for bandwidth translate into increasing revenue for private lines? The emergence of nationwide 4G wireless solutions will alter the competitive landscape. Will the 4G rollout lead to a wireless glut similar to the fiber surplus in 2001? This report explores the question of how and when the new 4G infrastructures will create a threat to traditional landline private lines.

A private line is a dedicated non-switched circuit or channel that is leased for a specified period. This channel provides a private and direct connection between at least two sites. *Private Line & Wavelength Services, 2010-2015* details revenue and circuit counts by carrier type, and defines the split between wholesale and retail sales of T-carrier (T1, T3) and OC-N circuits (OC-3, OC-12, OC-48, OC 192, OC-768), gigabit Ethernet, and wavelength services. Insight's annual study illustrates how carriers and their customers continue to move to higher capacity circuits in order to reap the benefits of lower cost-per-bit transport.

The 2010 Telecommunications Industry Review: An Anthology of Market Facts and Forecasts

www.insight-corp.com/reports/review10.asp

The 2010 Telecom Industry Review summarizes current conditions across the global telecommunications industry, providing analysis of over a dozen infrastructure and service segments. From fundamental background issues to detailed five-year forecasts accompanied by practical strategic advice, this study provides a sweeping examination of the telecom marketplace.

The Review provides up-to-date information in such key areas as high-speed access, optical networking, VoIP, operations support systems, gateways, cable telephony, residential and business communications trends, and new opportunities such as fixed mobile convergence, various IP-based applications delivered as services, and IPTV.

Whether you are an industry veteran or new to telecom, *The 2010 Telecom Industry Review* will serve as a frequently referenced yearbook, supplying hard data and sound analysis on pressing service and equipment issues. Concise, clear, and current, the review is a detailed strategic tool that amasses a year's worth of telecom research—over a dozen segments—into one comprehensive resource.

Carriers & Ethernet Services 2010-2015

www.insight-corp.com/reports/ethernet10.asp

Ethernet, the protocol that is ubiquitous in enterprise local area networks, is now being offered by service providers as a metro or wide area service. These publicly available Ethernet services have been among the communications market's fastest growing segments, with carriers enjoying revenue growth in the range of 25 percent annually as enterprises large and small opt for these new services offered in an array of speeds and reach.

Carrier Ethernet services, which was a $2.4 billion market in 2009, offers the enterprise customer the chance to tie locations together in what appear to be virtual LANs that can stretch across a metropolitan area, a region, a nation, or the world. These widely available Ethernet services offer significant advantages in cost and simplicity and in facilitating convergence—and are often touted as a replacement for legacy data solutions like private line and frame relay.

This Insight study projects market size, growth, and revenue, including segmented breakdowns of point-to-point and any-to-any services as well as by interface levels ranging from 10 Mbit/s to the emerging 10 Gbit/s standard. This report provides insight into this emerging arena that will fundamentally shape the communications market of the future.

Mash-Ups in Telecommunications 2010-2015

www.insight-corp.com/reports/mashup10.asp

Mash-ups are increasingly being developed and used by both consumer and enterprise users in everyday life. Giving the end user the ability to combine information sources into a useable output enhances the value of information and bolsters a sense of empowerment, and by adding telecommunications data such a location, presence, and call control information to a user-generated mash up also creates new revenue opportunities for telecommunications service providers.

This study reviews how information sources resulting from established standards as well as better data access and connectivity are being coupled with tools and capabilities to enable end-users to design and develop innovative services. Insight will explore the various facets of this emerging opportunity. We analyze the leading vendors and the technologies that are creating Mash-up capabilities, report on prominent service providers that illustrate best practices, and reveal areas of high potential for carriers including forecasts of Mash-Up adoption and revenue.

Telecom Services in Vertical Markets 2010-2015

www.insight-corp.com/reports/vert10.asp

Telecom Services in Vertical Markets, 2010-2015, the thirteenth market analysis study in this series from Insight Research, quantifies the telecom spending habits of major US industry segments for wired and wireless services. This report examines wired and wireless spending trends in the general economy and then delves into wired voice and data service spending patterns and wireless spending for specific industry segments, including: healthcare; construction; retail trade; wholesale trade; educational services; financial, insurance, and real estate services; professional business services; hotel and lodging; transportation; communications; utilities; entertainment and media; durable manufacturing; and non-durable manufacturing.

As competition drives down margins, solution selling into vertical markets enables real competitive differentiation, and allows increasingly sustainable profit margins. Vertical marketing opens new doors, taps niche markets, and builds customer loyalty. When telecom providers focus on vertical market solutions, they move away from the commodity voice sale and toward higher-margin, value-added services.

Managed Services in an IP World: New Opportunities for Wireless and Wired Networks 2010-2015

www.insight-corp.com/reports/manserv10.asp

Managed services, traditionally supplied by carriers or systems integrators to support their customer's requirements for complete WAN solutions, are headed into new territory. Whereas managed services used to require separate capabilities for monitoring each voice, data, mobile or video service, convergence based on common IP networks and systems technology will present new opportunities for wireless and wireline providers.

In this study, Insight will provide a detailed analysis of the current state of the managed services marketplace: the providers, the technology, and the scope of current service offerings. The study differentiates among four segments of managed services: managed WAN services, managed LAN, mobility management, and managed infrastructure. In addition to the revenue forecasts for these market segments, forecasts are provided for various market subdivisions including managed IP VPNs and IP endpoints, managed security services, managed WLANs, VoIP services, managed hosting and managed storage and a number of other significant areas within the managed services domain.

The report also provides Insight's survey of outsourced disaster recovery and storage management services by vertical industry.

US Hispanic Use of Telecommunications Services: Spending Patterns for Wireless and Wireline Services 2010-1015

www.insight-corp.com/reports/hisp10.asp

Nearly one out of every three dollars spent on residential telecommunications services in 2009 came from US ethnic communities, so the spending power of the Hispanic-American, African American, and Asian-American communities have become crucial to the survival of telecommunications providers. This market report takes a close look at the purchasing habits and telecom usage patterns of the burgeoning Hispanic segment of the US population. In the last census, Hispanics surpassed the African-American population as the largest minority group in the US. US Hispanic purchasing power is now growing at nearly twice the rate of the general population, fueled by continued population growth and increasing Hispanic employment and income levels.

US Hispanics are heavy users of local, long-distance, international, and wireless calling. Prepaid services have also experienced explosive growth in the US Hispanic market.

In this report, Insight examines spending by US Hispanics on local, long-distance, wireless, and pre-paid services, and compares these spending patterns to the general population and to other minority segments including Asian Americans and African Americans.

Telecommunications, IT and Healthcare: Wireless Networks, Digital Healthcare, and the Transformation of US Healthcare 2009-2014

www.insight-corp.com/reports/telhlth09.asp

The $2 trillion ecosystem of hospitals, physicians, pharmaceutical companies, and insurance providers that make up the healthcare industry will be spending tens of billions of dollars over the next five years on telecommunications services. Rising healthcare industry costs and a shortage of skilled staff have created a lucrative opportunity for technology and service providers, as hospitals and other front-line healthcare providers look to adopt new technology to lower their operating costs.

Wireless LANs, VoIP deployments, the RFID tagging of patients and hospital assets, as well as extending care to remote patients via telemedicine applications all promise to lower healthcare delivery costs. While the initial deployment analysis for revamped technology suggested long ago an increase in productivity and reduction in healthcare providers operating costs, more recent studies of patient satisfaction, the availability of federal grants, and the upcoming Medicare reimbursement policy for connection charges suggest that in the months and years ahead the healthcare industry is ready to make the commitment to a new generation of networking technology.

This study examines the emergence of techno-healthcare, surveys the rollout plans for a representative number of US hospitals, and forecasts spending for hardware and network services across the healthcare industry.

Custom Research

When faced with a challenging assignment, Insight Research's expert staff of telecom professionals can make the difference. We begin every project by working with our clients to develop a set of objectives, carefully document-ing the elements of work, and setting realistic schedules and deadlines. Our clients know that we are responsive, provide value, deliver on time, and always adhere to the strictest levels of confidentiality.

Call Insight today to learn how our custom capabilities can assist you. Our custom research clients have recently ben-efited from studies on the following topics:

- Wholesale Markets Revenue Assessment *(Large Domestic Carrier)*
- Competitive Assessment of Video Services Capabilities *(Large Domestic Carrier)*
- Domestic Private Line Provisioning Intervals *(RBOC)*
- Cloud Computing Analysis *(Overseas Carrier)*
- Market Potential for New Technology *(Start-Up Company)*
- Wireless Intellectual Property Market Evaluation *(State-sponsored R&D Directorate)*
- Analysis of Customer Buying Criteria *(OSS Provider)*
- Wireless Data Wholesale Revenue Opportunity *(International Carrier)*
- Customer Credit Policy Analysis *(Tier1 Service Provider)*
- Wireless Data Project *(Auto Manufacturer)*
- Strategy Planning *(Independent Operating Company)*
- Impacts of IP on SS7 Markets *(Telecom Service Bureau)*
- Analysis of IP Growth Markets *(Carrier's Carrier)*
- Cost Analysis of Emulated Private Line *(Next-Gen Start-Up Company)*

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Recent Insight Reports

The Global Market for Unified Communications: Software, Services and Solutions 2009-2014

www.insight-corp.com/reports/unified09.asp

In this study, Insight provides a global perspective on the software, hardware and services transforming unified communications. Current UC solutions exploit all available channels—including email, phones, faxes, instant messaging (IM), PBXs, voice/video messages and wireless connectivity. However, voice packetization has opened the doors to non-traditional UC solution develop-ers who are now competing with traditional networking experts, which created a bewildering array of claims and capabilities and retarded marketplace acceptance. Insight analyzes the strategies of individual platform vendors, looks at how carriers are creating and selling the offers, and examines the key role of system integrators in implementing the solutions.

Advertising Enablement: Telecommunications Move to Advertising Supported Offers 2009-2014

www.insight-corp.com/reports/ad09.asp

Most telecommunication service providers have yet to embrace ad-supported services, although much of the Internet, specifically Google, has seen success with the strategy. Insight explores the unique challenges of advertising selection, insertion, presentation, interactivity, and managing the results. This report examines the entire advertising enablement ecosystem from the vantage of a telecommunication service provider. Vendor product profiles, along with examples from prominent service providers, illustrate approaches and identify best practices. Forecasts for each domain and each advertising enablement technology are provided.

Streaming Media, IPTV, and Broadband Transport: Telecommunications Carriers and Entertainment Services 2009-2014

www.insight-corp.com/reports/IPTV09.asp

Streaming media—the IP transmission of on-demand rich media that gives the user the ability to listen to audio and view video from the network without downloading the content—is being used to deliver information and entertainment services. In this research report, Insight studies the role and many applications of IPTV, streaming 4G wireless systems, and traditional wireless and wired networks. We also evelute the broadband infrastructure, hardware, and software necessary to deliver this service to the market, and the end user devices at work in homes and businesses. This study provides a detailed forecast of the video, IPTV, and streaming media markets—including the applications and markets.

The Mobile Phone and Financial Applications Worldwide 2009-2014

www.insight-corp.com/reports/MPF08.asp

The evolution of mobile phone technology and markets has gone hand in hand with the perennial quest of wireless carriers to improve their margins. This report analyzes the leading mobile phone financial applications from the point of view of the major stakeholders and covers key applications areas including banking, credit cards, peer-to-peer payments, payment for content, bar coding, RF payment systems/proximity cards, stock trading, authentication, retail applications, and ticketing.