2011 MARKET RESEARCH AGENDA

Mobile Workforce and Enterprise Applications 2011-2016

www.insight.corp.com/reports/mwf11.asp

Wireless technology has fully penetrated enterprises and enabled businesses of all sizes to experience some benefits of a mobile workforce. As enterprises increasingly look to expand customer service, the next generation of wireless products and services will enable more robust enterprise applications to support an expanded mobile workforce. Over the past decade, wireless networks, devices, and applications have been developed to support the most basic enterprise applications, such as voice, email, ordering, and tracking. These developments were largely independent of the enterprise applications on the wireline side, which were expanding to support broadband access to intranet and internet applications. The next few years will see an increasing integration of wireline and wireless applications, enabled by new technologies, such as IMS, 3G networks, smart phones, and WiMAX devices.

This report will provide a detailed analysis of the wireless technologies, application platforms, and workforce trends that will accompany this integration. Carriers, device manufacturers, software companies, and application providers are swarming around this market, searching for the key set of features needed to win in the high-margin, enterprise application space. Mobility and IP convergence will be examined, along with fixed-mobile convergence, IMS, and content services. Insight will provide forecasts of enterprise wireless service demand by wireless application type as well as demand by vertical industry.

Communicating GREEN: Telecommunications Value in Promoting Environmental Improvement 2011-2016

www.insight-corp.com/reports/green11.asp

In this study, Insight examines the positive role fixed line and mobile telecommunications applications will play by ameliorating a wide array of current environmental concerns. Green communications product & service portfolios exist today, though they are not being marketed as such—and this study puts a dollar value on marketing portfolios that aid the environment.

Communicating Green identifies several key domains in which telecom applications can have a direct, tangible impact on lowering greenhouse gas emissions, power consumption, and achieving efficient recycling of equipment waste. For example, transportation demand management systems can cut down emissions produced by vehicles by leveraging location-based services, unified communications services, mobile resource management and fleet management systems. Major domains are identified and a forecast of carrier revenue related to these portfolios is provided.

Managed Services in an IP World: New Opportunities for Wireless and Wired Networks 2011-2016

www.insight-corp.com/reports/manserv11.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 these 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. Also provided is Insight's survey of outsourced disaster recovery and storage management services by vertical industry.

VoIP and the SME: CableCos, Telcos, the Rise of Hosted Service Models 2011-2016

www.insight-corp.com/reports/voip11.asp

In the never-ending quest to squeeze additional revenues from their infrastructure, cable companies have launched a full scale blitz on business markets. Telcos—which have long considered the small and medium business markets their exclusive domains—now are contending with the CableCo assault and competition from a variety of upstart hosted service providers that are providing enhanced VoIP services into this hotly contested market.

In a new research study, Insight's analysis reveals that more than three million small and medium businesses are geographically located within two-way capable cable systems, a veritable gold mine of captive customers for cable MSOs. By factoring in home-based businesses as well, the near-term opportunity created by this market is well in excess of 20 million lines.

This report analyzes enhanced VoIP services that are made possible by today's technology—not just telephony, but complete suites of unified communications geared and priced for the unique business requirements of SMEs. Insight quantifies the SME addressable market opportunity by vertical industry for VoIP and unified communications hosted services, and measures the competitive risk they pose to the incumbent telephone carriers.

THE INSIGHT RESEARCH CORPORATION

PO Box 34
Mountain Lakes, NJ 07046
973/541-9600
info@insight-corp.com
www.insight-corp.com

Private Line and Wavelength Services 2011-2016

www.insight-corp.com/reports/pl11.asp

Increasing demand for wireless backhaul and converged solutions using VoIP and MPLS are driving the demand for local private lines. The market for high speed point to point circuits is expected to remain moderately positive over the next few years, even as Ethernet takes an increasing share of the point-to-point market. This study 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 ever-increasing amounts of bandwidth translate into increasing revenue for private lines? Will the emergence of nationwide 4G wireless solutions alter the competitive landscape? 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, 2011-2016* 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.

Carriers & Ethernet Services 2011-2016

www.insight-corp.com/reports/ethernet11.asp

Ethernet,the world's primary computer-to-computer protocol with interfaces on well over a billion computers worldwide, is now being offered by nearly every US service provider 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 $3.2 billion market in 2010, 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.

The 2011 Telecommunications Industry Review: An Anthology of Market Facts and Forecasts

www.insight-corp.com/reports/review11.asp

The 2011 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, 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 2011 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.

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 & 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 app developers. We project markets for apps and discuss the impact of a Web 2.0 application deployment model on network operators.

Telecom Services in Vertical Markets 2011-2016

www.insight-corp.com/reports/vert11.asp

Telecom Services in Vertical Markets, 2011-2016, the fourteenth 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.

Mash-Ups in Telecommunications 2010-2015

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

"Mashups" 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 as location, presence, and call control information to a user-generated mashup 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 mashup capabilities, report on prominent service providers that illustrate best practices, and reveal areas of high potential for carriers including forecasts of mashup adoption and revenue.

US Hispanic Use of Telecommunications Services: Spending Patterns for Wireless and Wireline Services 2011-1016

www.insight-corp.com/reports/hisp11.asp

Nearly one out of every three dollars spent on residential telecommunications services in 2010 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 and post-paid 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.

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.

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 documenting 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.

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THE
INSIGHT
RESEARCH
CORPORATION

PO Box 34 • Mountain Lakes, NJ 07046 • 973/454-5551
email: info@insight-corp.com • www.insight-corp.com

Recent Insight Reports

Carriers & Ethernet Services 2010-2015

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

Ethernet, the protocol ubiquitous in enterprise local area networks, is now being offered by service providers as a metro or wide area service. These services have carriers enjoying revenue growth in the range of 25 percent annually as enterprises opt for services offered in an array of speeds and reach. Carrier Ethernet services, 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 or the world. Ethernet services are often touted as a replacement for legacy data solutions like private line and frame relay. This study projects market size, growth, and revenue, including segmented breakdowns of point-to-point and any-to-any services.

The Mobile Phone and Financial Applications Worldwide 2009-2014

www.insight-corp.com/reports/ad09.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. It is easy to imagine data-driven financial applications a "must have" utility for consumers for many years to come. There are several key attributes of mobile financial applications that promise to make this class of services particularly attractive to carriers, including the diversity of potential uses; dependence on transactional data; the ability to involve multiple stakeholders to distribute risk; and the likelihood of continual product innovation. Insight analyzes leading mobile phone financial applications and covers key areas including banking, credit cards, peer-to-peer payments, RF payment systems/proximity cards, stock trading, retail applications, and ticketing.

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

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

What is the consequence of the financial recession for the telecom sector? Telecommunications and the Internet are now vital platforms, underpinning trade, industry, finance, and personal communications. Services are coming under pricing pressure and margins are eroding, which in turn will affect investment in infrastructure and new technology. This report explores the impact of the financial crisis on the telecom sector in quantitative terms on capital investments, such as optical equipment and fiber, and Ethernet and Sonet/SDH equipment.

Rural versus Urban Telecommunications in the US: Changes in Markets and Technologies, 2009-2014

www.insight-corp.com/reports/rural09.asp

Even though more than twenty-percent of US households are situated in rural areas, can these subscribers expect the same access to broadband-based information and commerce services as their urban and suburban counterparts? Will Washington take further actions to push for larger subsidies to rural areas which will result in comprehensive broadband deployment? Broadband penetration rates are expected to level off in urban areas, but the potential for growth exists in rural areas. This study looks at the residential and business makeup and examines the economics of providing broadband services to this large, but too often ignored market.