

**Lucent Adjusts to Voice as Data:
Market Strategies, Market Opportunities, and
Market Forecasts, 2002-2007**

Lucent Market Assessment



WINTERGREEN RESEARCH, INC.

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

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Lucent Markets,

Lucent Segment Analysis,

Summary Telecommunications Market Forecasts,

Softswitches,

Lucent Technologies Strategic Positioning

MARKET STRATEGIES FORECASTS TO 2007

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Lucent Markets,

Lucent Telecommunications Market Environment and
Strategic Direction

Telecommunications Market Trends

MARKET STRATEGIES FORECASTS TO 2007

CHECK OUT THESE KEY TOPICS

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Lucent Market Growth Factors
Lucent Market Shares
Lucent Positioning Strategies

Lucent Market Growth Opportunities

Telecommunications Market Outlook
Lucent Wireless Telecommunications Market Participation
Telecommunication Switch Markets
Softswitch Markets
Business Strategy
Reorganization Strategy
Strategic Alliances Shift to Go to Market Strategies
2-G Technologies
Lucent Worldwide Services

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**Lucent Adjusts to Voice as Data:
Market Strategies, Market Opportunities, and Market Forecasts,
2002 to 2007**

The convergence of voice and data turns out to be merging of voice into data networks. As voice is transmitted over IP networks, call control switching is still needed. But, the shrinking markets are driving market consolidation. The trend towards consolidation in the global telecommunications industry is expected to continue into 2003. Lucent is positioning to embrace new network architecture that the RBOCs use to implement networks in a more efficient manner.

Lucent is positioned to participate in the continuing expansion of wireless capabilities. End-user demand for network capacity from businesses and other organizations is expected to continue to grow in 2002 creating market demand for Lucent products. In 2002, declines in service provider capital spending in the area of long-distance optical networking are continuing.

Telecommunications markets are going to have diminished size early in the forecast period with some recovery later on. Telecommunications infrastructure is a primary economic driver in both developed and underdeveloped countries. New telecommunications infrastructure provides direct benefit because it supports reliable communication, universal access to voice communication, and Internet access. Telecommunications infrastructure provides indirect benefit by supporting the ability to achieve an educated population. The Internet provides access to information for enterprise training and learning that is useful for every discipline. This promises to continue. The Internet has become a significant sales and distribution channel in every industry. The Internet automates supply chains, changing the economics of doing business.

Lucent will continue to have its strongest markets in the United States. In the United States service providers are beginning to utilize excess network capacity. Only later will carriers exceed their excess network capacity. Once service providers have exhausted their current excess network capacity and begin to engage in new network expansions, service provider demand for long-distance optical networking equipment will occur.

Start-up and smaller telecommunications customers are struggling or faltering. Economic stimulus measures by the United States and other countries, such as the proposed deregulation of the Local Access Transport Area (LATA), may provide new spending opportunities for service providers around the world including Lucent.

Telecommunications equipment shipment forecasts at \$204.8 billion in 2001 are expected to reach \$344.1 billion by 2007. Lucent will participate in these markets with significant market presence.

Lucent Company Profile

Market Leaders

Lucent Technologies
Lucent Technologies Strategic Positioning
Lucent Revenue
Regional Market Analysis
Lucent Regional Revenues
Telecommunications Market Regional Analysis
Lucent Bell Labs

Lucent Market Strategies and Forecasts, 2002-2007

REPORT METHODOLOGY

THIS IS THE HUNDRED AND THIRTY-SEVENTH REPORT IN A SERIES OF MARKET RESEARCH REPORTS THAT PROVIDE FORECASTS IN COMMUNICATIONS, TELECOMMUNICATIONS, THE INTERNET, COMPUTER, SOFTWARE, AND TELEPHONE EQUIPMENT. 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.

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LUCENT EXECUTIVE SUMMARY

LUCENT EXECUTIVE SUMMARY	ES-1
Consolidation of the Global Telecommunications Industry	ES-1
Changes in the Worldwide Communications Industry	ES-2
Lucent Segment Analysis	ES-4
Summary Telecommunications Market Forecasts	ES-7
Softswitches	ES-10
Lucent Technologies Strategic Positioning	ES-11
Business Forces Driving Change For Lucent	ES-12
Softswitch Market Forces	ES-13
Softswitch Emergence	ES-15

LUCENT TELECOMMUNICATIONS MARKET ENVIRONMENT AND STRATEGIC DIRECTION

1. LUCENT TELECOMMUNICATIONS MARKET ENVIRONMENT AND STRATEGIC DIRECTION	1-1
1.1 Convergence of Voice And Data	1-1
1.2 Packet / Cell Voice Systems	1-2
1.3 Voice-Enabling The Data Network	1-3
1.4 Transition From Circuit Switch Network To IP Architecture	1-4
1.5 IP Network Delay And Congestion	1-6
1.6 Change In Telecommunication Network Architecture	1-6
1.7 Foundations For Telecommunications Network Change	1-8
1.8 Converged Network Revolution	1-10
1.9 IP Telephony For Long Distance	1-11
1.10 Global Telecommunications Market Deterioration	1-11
1.10.1 Impact of Lower Telecommunications Capital Spending	1-12
1.11 Market Environment And Strategic Direction	1-13
1.11.1 Wireline And Wireless Market Segmentation	1-13
1.11.2 Market Environment	1-14
1.11.3 Decline In The Credit-Worthiness Of Customers	1-15
1.12 Manufacturing Outsourcing	1-15
1.13 Competitive Issues	1-19
1.14 Global Electronics Design And Manufacturing Services	1-21
1.14.1 Design	1-22
1.14.2 Photonics	1-24
1.15 Research	1-24

LUCENT MARKET FORECASTS

2. LUCENT MARKET FORECASTS	2-1
2.1 Telecommunications Market Trends	2-1
2.2 Worldwide Telecommunications Market Driving Forces	2-5
2.2.1 Go To Market Strategy	2-7
2.2.2 Impact of Voice Packet Architecture	2-7
2.3 Communications Opportunity	2-8
2.3.1 Lucent Marketing Globally	2-11
2.4 Telecommunications Summary Market Share Analysis	2-14
2.5 Telecommunications Summary Segment Analysis	2-19
2.6 Summary Telecommunications Market Forecasts	2-22
2.7 Index Of Company Sales	2-26
2.8 Telecommunications Market Outlook	2-30
2.8.1 Time To Market	2-33
2.8.2 Pursue Performance Excellence	2-34
2.9 Lucent Wireless Telecommunications Market Participation	2-34
2.9.1 Wireless Telecommunications Market Shares	2-34
2.9.2 Wireless Infrastructure Markets	2-41
2.9.3 Wireless Telecommunications Market Forecasts	2-43
2.9.4 Wireless Infrastructure	2-44
2.9.5 Base Station Market Forecasts	2-45
2.9.6 Wireless Switch Market Forecasts	2-47
2.9.7 Wireless Infrastructure Segments	2-51
2.9.8 Wireless Infrastructure Regional Analysis	2-58
2.9.9 Driving Forces Of Wireless Infrastructure Market	2-60
2.9.10 Wireless LAN Market Forecasts	2-61
2.9.11 Broadband Fixed Wireless Market Forecasts	2-61
2.9.12 Mobile Subscribers	2-62
2.9.13 Wireless Networks	2-63
2.10 Telecommunication Switch Markets	2-64
2.10.1 Circuit Switches	2-68
2.10.2 Multiservice Switches	2-72
2.10.3 Cabling And Assemblies	2-76
2.11 Softswitch Markets	2-77
2.11.1 Summary Total Softswitch Market Forecasts	2-79
2.12 Sonet / SDH	2-84
2.12.1 Sonet / SDH Market Shares	2-84
2.12.2 Sonet Market Forecasts	2-87
2.12.3 DWDM Systems Market Shares	2-89
2.12.4 DWDM Systems Market Forecasts	2-92
2.12.5 Digital Subscriber Line (DSL)	2-95
2.12.6 DSL Market Shares	2-96
2.12.7 DSL Market Forecasts	2-99
2.12.8 Digital Loop Carriers (DLCs)	2-101
2.12.9 DLC Market Shares	2-101
2.12.10 DLC Market Forecasts	2-103
2.12.11 Service Provider Routers	2-105
2.13 Frame Relay Systems	2-108
2.14 VoIP High Density Rack Mounted Gateway Service Provider Market Shares	2-109
2.14.1 VoIP High Density Rack Mounted Gateway Service Provider Market Forecasts	2-114
2.15 Lucent Market Participation	2-117
2.15.1 Lucent Segment Analysis	2-119

LUCENT PRODUCT POSITIONING

3.	LUCENT PRODUCT POSITIONING	3-1
3.1	Service Intelligent Network Architecture	3-1
3.1.1	Integrated Network Solutions Segment	3-1
3.1.2	Lucent Network Architecture	3-2
3.1.3	Integrated Network Solutions (INS) Segment	3-6
3.2	Lucent Switches	3-7
3.2.1	Circuit Switching	3-7
3.2.2	Packet Switching	3-8
3.2.3	Advantages And Disadvantages Of Packet Switching	3-8
3.2.4	Lucent 5ESS'r' Switch	3-9
3.2.5	Lucent 7R/E Switch	3-10
3.2.6	Lucent Next Generation Core Multiservice Switch	3-10
3.2.7	Lucent SoftSwitch	3-10
3.2.8	Lucent LambdaUnite	3-11
3.2.9	Lucent LambdaRouter™ All Optical Switch	3-12
3.3	Lucent Access Products	3-15
3.3.1	Lucent MAX TNT Edge Access Product	3-15
3.3.2	Lucent Stinger DSL	3-16
3.3.3	Lucent Broadband Access	3-16
3.3.4	Lucent DSL	3-17
3.3.5	Lucent Optical Networking Products	3-18
3.4	Lucent Optical Transmission Networking Products	3-19
3.4.1	Lucent Core Optical Networking Products	3-20
3.4.2	Lucent Core DWDM Transport	3-21
3.4.3	LambdaXtreme™ Transport	3-21
3.4.4	Lucent WaveStar® OLS 1.6T	3-23
3.4.5	Lucent Metro Optical Solutions	3-24
	Lucent Technologies Next-Generation Ring DWDM Optical Equipment	3-26
3.5	Lucent Wireless Products	3-27
3.5.1	Lucent Base Stations Products	3-29
3.5.2	Lucent Core Wireless Network Equipment	3-30
3.5.3	Springtide 7000'r' IP services switch	3-31
3.5.4	Lucent SpringTide	3-31
3.5.5	Wireless Service Intelligent Architecture	3-32
	Flexent® CDMA Distributed Base Station for Cellular Networks	3-32
3.5.7	Flexent® Modular Cell Base Station	3-34
3.5.8	Flexent® GSM Macrocell	3-35
3.5.9	Wireless Applications And Service Delivery Products	3-36
3.6	Lucent Network Management Products	3-36
3.7	Lucent Worldwide Services	3-37

LUCENT POSITIONING STRATEGIES

4. LUCENT POSITIONING STRATEGIES	4-1
4.1 Business Strategy	4-1
4.1.1 Lucent	4-4
4.1.2 Lucent Strategy	4-5
4.1.3 Lucent Global Capability And Experience	4-6
4.1.4 Lucent Divestitures	4-7
4.2 Restructuring Telecommunications Vendor Organizations	4-8
4.2.1 Contract Manufacturing	4-9
4.2.2 Organizational Realignment	4-9
4.2.3 Vendor Reorganization	4-10
4.3 Reorganization Strategy	4-11
4.3.1 Lucent Reorganization Strategy	4-12
4.3.2 Lucent Restructuring Program	4-13
4.4 Strategic Alliances Shift To Go To Market Strategies	4-15
Strategic Alliances, Acquisitions, And Minority Investments	4-16
4.5 2-G technologies	4-17
4.5.1 Lucent 3-G	4-18
4.6 Customer Financing	4-18

LUCENT COMPANY PROFILE

5. LUCENT COMPANY PROFILE	5-1
5.1 Lucent Technologies	5-1
5.1.1 Service Provider Networks	5-2
5.2 Lucent Technologies Strategic Positioning	5-3
5.2.1 Business Forces Driving Change For Lucent	5-4
5.2.2 Softswitch Market Forces	5-5
5.2.3 Softswitch Emergence	5-7
5.2.4 Lucent Softswitch / Level 3	5-7
5.3 Lucent Revenue	5-7
5.3.1 Lucent Sale Of Optical Fiber Business	5-14
5.3.2 Lucent Sale Of Manufacturing Operations	5-15
5.3.3 Agere	5-16
5.4 Regional Market Analysis	5-17
5.4.1 United States And Canada Telecommunications Markets	5-17
5.4.2 European Telecommunications Markets	5-17
5.4.3 Asia Pacific Region Telecommunications Markets	5-18
5.4.4 Chinese Telecommunications Markets	5-19
5.4.5 Caribbean And Latin America	5-19
5.4.6 Africa	5-20
5.5 Lucent Regional Revenues	5-20
5.5.1 Lucent Non-U.S. Operations	5-23
5.6 Telecommunications Market Regional Analysis	5-24
5.7 Lucent Bell Labs	5-27
5.7.1 Service Intelligent Network Architecture	5-29
5.7.2 Bell Labs Powers LambdaXtreme	5-32
5.7.3 Bell Labs-Developed Raman Amplification System	5-32
5.7.4 Bell Labs Flexent™ Mobility Server	5-33
5.7.5 Bell Labs Multilingual Text-to-Speech Systems	5-34
5.7.6 Bell Labs Nature Of Internet Traffic	5-35
5.7.7 Bell Labs Calculates Theoretical Limits Of Fiber Optic Communications	5-36
5.7.8 Bell Labs Software Enables Global Roaming Across All Wireless Networks	5-36

List of Tables and Figures**LUCENT EXECUTIVE SUMMARY**

Figure ES-1	ES-6
Worldwide Lucent Telecommunications Market Segments, Dollars, 2001	
Table ES-2	ES-7
Lucent Shipments by Segment, Dollars, 2001	
Figure ES-3	ES-8
Worldwide Telecommunications Equipment Market Forecasts, Dollars, 2002-2007	
Table ES-4	ES-9
Global Telecommunications Equipment Shipment Forecast by Segment, Dollars, 2002-2007	
Table ES-5	ES-13
Business Forces Driving Change	
Table ES-6	ES-14
Softswitch Market Issues	

LUCENT TELECOMMUNICATIONS MARKET ENVIRONMENT AND STRATEGIC DIRECTION

Table 1-1	1-2
Packet/Cell Technologies Used For Voice	
Table 1-2	1-4
Factors Impacting Voice Quality	
Table 1-3	1-9
Shift From Separate Voice And Data Core Transmission Systems	
Table 1-4	1-12
Reasons Global Telecommunications Market Deteriorated	
Table 1-5	1-16
Telecommunications And Computer Marketing Organization	
Benefits From Outsourcing Manufacturing	
Table 1-6	1-17
Contract Manufacturers Address Customer Needs	
Table 1-7	1-18
Contract Manufacturer Benefits to Customers	
Table 1-8	1-19
Contract Manufacturer Partnering With Customers	
Table 1-9	1-20
Outsource Manufacturer Competitive Positioning	
Table 1-10	1-23
Outsourcer ASIC Design Services	

LUCENT MARKET FORECASTS

Table 2-1	2-2
Changes In Communications Competitive Environment	
Table 2-2	2-3
Changes In Market Direction	
Table 2-3	2-4
Changes In Voice Markets	
Table 2-4	2-6
Principal Competitive Factors In Telecommunications Markets	
Table 2-5	2-10
Communications Network Market Opportunities	
Table 2-6	2-12
Lucent Marketing Globally	
Figure 2-7	2-15
Top Ten Telecommunications Public Equipment Shipments By Company, 2001	
Table 2-8	2-16
Top Ten Telecommunications Equipment Provider Shipments, 2001	
Figure 2-9	2-17
Top Ten Telecommunications Provider Shipments, 1998 – 2001	
Table 2-10	2-18
Top Ten Telecommunications Equipment Provider Shipments, 1998 – 2001	
Figure 2-11	2-19
Worldwide Telecommunications Equipments Shipments By Segment, 2001	
Table 2-12	2-20
Global Telecommunications Equipment Provider Shipments By Segment, Dollars, 2001	
Figure 2-13	2-21
Worldwide Telecommunications Equipment Shipments By Segment, 2007	
Table 2-14	2-22
Global Telecommunications Equipment Provider Shipments By Segment, Dollars, 2007	
Figure 2-15	2-23
Worldwide Telecommunications Equipment Market Forecasts, Dollars, 2002 – 2007	
Table 2-16	2-24
Global Telecommunications Equipment Shipment Forecast By Segment, Dollars, 2002 – 2007	
Table 2-17	2-25
Reasons For Telecommunications Market Declines In 2001	
Figure 2-18	2-27
Index Sales of Selected Leading Telecommunications Equipment Suppliers, 1993 – 2001	
Table 2-19	2-28
Index Of Company Sales	
Table 2-20	2-30
Telecommunications Infrastructure Market Outlook	
Table 2-21	2-33
Telecommunications Infrastructure Benefits	

Figure 2-22	2-35
Global Wireless Base Station Infrastructure Market Shares, 2001	
Table 2-23	2-36
Global Wireless Base Stations Market Shares, 2001	
Figure 2-24	2-37
Global Wireless Switch Infrastructure Market Shares, 2001	
Table 2-25	2-38
Global Wireless Switch Market Shares, 2001	
Figure 2-26	2-39
Global Wireless Infrastructure Market Shares, 2001	
Table 2-27	2-40
Global Wireless Infrastructure Market Shares, 2001	
Figure 2-28	2-43
Worldwide Wireless Telecommunications Equipment Market Forecasts, Dollars, 2002 - 2007	
Table 2-29	2-44
Global Telecommunications Wireless Equipment Shipment Forecast By Segment, Dollars, 2002 - 2007	
Figure 2-30	2-46
Global Wireless Base Station Infrastructure Market Forecasts, Dollars, 2002 - 2007	
Table 2-31	2-47
Global Wireless Base Station Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-32	2-48
Global Wireless Switch Infrastructure Market Forecasts, Dollars, 2002 - 2007	
Table 2-33	2-48
Global Wireless Switch Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-34	2-51
Global Wireless Infrastructure Market Segments, 2001	
Figure 2-35	2-52
Global Wireless Infrastructure Market Segments, 2007	
Table 2-36	2-53
Factors Contributing To Mobile Systems Infrastructure Growth	
Figure 2-37	2-55
Global Wireless Infrastructure Market Forecasts, Dollars, 2002 - 2007	
Table 2-38	2-55
Global Wireless Infrastructure Market Shipment Forecasts, Dollars, 2002 - 2007	
Table 2-39	2-64
Service Provider Build-Out Of The Next Generation 3G Systems	
Figure 2-40	2-66
Worldwide Central Office Telecommunications Equipment Market Forecasts, Dollars, 2002 - 2007	
Table 2-41	2-67
Global Telecommunications Central Office Equipment Shipment Forecast By Segment, Dollars, 2002 - 2007	
Figure 2-42	2-69
Global Central Office Circuit Switch Market Shares, 2001	
Table 2-43	2-69
Global Circuit Switch Market Shares, 2001	

Figure 2-44	2-70
Global Central Office Circuit Switch Market Forecasts, Dollars, 2002 - 2007	
Table 2-45	2-71
Global Circuit Switch Equipment Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-46	2-73
Global Multiservice ATM/IP Market Shares, 2001	
Table 2-47	2-74
Global Wide Area Network Multiservice Switch ATM/IP Equipment Market Shares, 2001	
Figure 2-48	2-75
Global Multiservice ATM/IP Wide Area Core Network Switch Market Forecasts, Dollars, 2002 - 2007	
Table 2-49	2-75
Global Wide Area Network Multiservice ATM/IP Switch Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-50	2-77
Worldwide Central Office Cable and Assembly Market Forecasts, Dollars, 2002 - 2007	
Figure 2-51	2-78
Global Softswitch Infrastructure Market Shares, 2001	
Table 2-52	2-79
Global Softswitch Infrastructure Market Shares, 2001	
Figure 2-53	2-80
Worldwide Total Softswitch Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-54	2-81
Total Softswitch Shipment Forecasts, Dollars, 2002 - 2007	
Table 2-55	2-83
Softswitch Market Issues	
Figure 2-56	2-85
Global Sonet/SDH Market Shares, 2001	
Table 2-57	2-86
Global Sonet/SDH Landline Market Shares, 2001	
Figure 2-58	2-88
Worldwide Sonet/SDH Market Forecasts, Dollars, 2002 - 2007	
Table 2-59	2-88
Global Sonet/SDH Equipment Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-60	2-90
Global DWDM Market Shares, 2001	
Table 2-61	2-90
Global DWDM Landline Market Shares, 2001	
Figure 2-62	2-93
DWDM Market Forecasts, Dollars, 2002 - 2007	
Table 2-63	2-94
Global DWDM Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-64	2-97
Global DSL Market Shares, 2001	
Table 2-65	2-97
Global DSL Market Shares, 2001	

Table 2-66	2-98
Target Markets For DSL Growth	
Figure 2-67	2-100
Global Digital Subscriber Line (DSL) Market Forecasts, Dollars, 2002 - 2007	
Table 2-68	2-100
Global Digital Subscriber Line (DSL) Equipment Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-69	2-102
Global DLC Market Shares, 2001	
Table 2-70	2-103
Global DLC Market Shares, 2001	
Figure 2-71	2-104
Global Digital Loop Carrier (DLC) Market Forecasts, Dollars, 2002 - 2007	
Table 2-72	2-104
Global DLC Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-73	2-106
Global Service Provider Data Router Market Shares, 2001	
Table 2-74	2-106
Global Service Provider Data Router Market Shares, 2001	
Figure 2-75	2-107
Global Service Provider Router Market Forecasts, Dollars, 2002 - 2007	
Table 2-76	2-108
Global Service Provider Router Market Shipment Forecasts, Dollars, 2002 - 2007	
Figure 2-77	2-109
Worldwide Enterprise Frame Relay Market Forecasts, Dollars, 2002 - 2007	
Figure 2-78	2-110
Worldwide Rack Based Voice Over IP Service Provider Gateway High Density Voice Port Market Shares, Dollars, 2001	
Table 2-79	2-111
Worldwide Rack Based Voice Over IP Service Provider Gateway High Density Voice Port Market Shares, Dollars, 2001	
Figure 2-80	2-112
Worldwide Rack Based Voice Over Service Provider Gateway High Density Voice Market Shares, Ports, 2001	
Table 2-81	2-113
Worldwide Rack Based Voice Over IP Service Provider Gateway High Density Voice Market Shares, Ports, 2001	
Table 2-82	2-113
Worldwide Rack Based Voice Over IP Service Provider Gateway Voice Unit Market Shares, 2001	
Figure 2-83	2-115
Worldwide Voice Over IP Service Provider Rack Based Voice Gateway Shipments, Dollars, 2002 - 2007	
Table 2-84	2-115
Global Voice Over IP (Vo IP) Router Market Shipment Forecasts, Dollars, 2002 - 2007	

Figure 2-85 Worldwide Voice Over IP Service Provider Rack Based Voice Gateway Shipments, Ports, 2002 - 2007	2-117
Figure 2-86 Worldwide Lucent Telecommunications Market Segments, Dollars, 2001	2-120
Table 2-87 Lucent Shipments By Segment, Dollars, 2001	2-121

LUCENT PRODUCT POSITIONING

Table 3-1 Service Intelligent Network Architecture Key Elements	3-3
Table 3-2 Lucent LambdaUnite Network Functions	3-12
Table 3-3 Lucent LambdaRouter All Optical Switch Features	3-14
Table 3-4 Enhanced revenues from DWDM	3-23
Table 3-5 Lucent Metro Customer Provisioning	3-25

LUCENT POSITIONING STRATEGIES

Table 4-1 Vendor Reorganization Activities	4-10
---	------

LUCENT COMPANY PROFILE

Table 5-1 Business Forces Driving Change	5-4
Table 5-2 Softswitch Market Issues	5-5
Figure 5-3 Lucent Regional Market Shares, 2001	5-22
Table 5-4 Lucent Shipment By Region, Dollars, 2001	5-23
Figure 5-5 Worldwide Telecommunications Equipment Shipments By Region, 2001	5-25
Table 5-6 Worldwide Telecommunications Equipment Provider Shipments By Region, Dollars, 2001	5-26
Table 5-7 Top Ten Telecommunications Equipment Provider Shipment By Region, Dollars, 2001	5-27
Table 5-8 Service Intelligent Network Architecture Key Elements	5-29

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

ELLEN T. CURTISS, TECHNICAL DIRECTOR, CO-FOUNDER OF WINTERGREEN RESEARCH, CONDUCTS STRATEGIC AND MARKET ASSESSMENTS IN TECHNOLOGY-BASED INDUSTRIES. PREVIOUSLY SHE WAS A MEMBER OF THE STAFF OF ARTHUR D. LITTLE, INC., FOR 23 YEARS, MOST RECENTLY AS VICE PRESIDENT OF ARTHUR D. LITTLE DECISION RESOURCES, SPECIALIZING IN STRATEGIC PLANNING AND MARKET DEVELOPMENT SERVICES. SHE IS A GRADUATE OF BOSTON UNIVERSITY AND THE PROGRAM FOR MANAGEMENT DEVELOPMENT AT HARVARD GRADUATE SCHOOL OF BUSINESS ADMINISTRATION. SHE IS THE AUTHOR OF RECENT STUDIES ON WORLDWIDE TELECOMMUNICATIONS MARKETS, THE TOP TEN INTERNET EQUIPMENT COMPANIES, THE TOP TEN CONTRACT MANUFACTURING COMPANIES, AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

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