

**Service Provider Softswitch
Market Opportunities, Forecasts, And Shares,
2002-2007**



OPPORTUNITY ABOUND

**WinterGreen Research, Inc.
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SERVICE PROVIDER SOFTSWITCH

MARKET OPPORTUNITIES, FORECASTS, AND SHARES, 2002- 2007

Telecommunications continues to account for most of the service provider revenue. The convergence of voice and data brings new opportunity to telecommunications service provider markets. New opportunity relates to compiling softswitch feature sets on computer industry hardware. The new IBM Blade computer hardware product represents the type of open systems hardware that will replace proprietary circuit switch hardware in service provider central offices. Softswitches will provide expanded feature sets that support offering new value added services.

Telecommunications markets have stalled as the dual effects of over capacity and a fundamental shift in network architecture create market uncertainty. The enormous capacity provided by DWDM systems increased existing transmission capacity by factors of 40 to 80, for very little incremental cost. Optical systems promise to continue to create enormous capacity at vastly lower system cost.

Communications infrastructure needs new capabilities provided by softswitches. Granular call control is needed to achieve development of value added services that will create new market thrust. Communications remains the single most significant aspect of economic growth and change. Economies of scale are dependent on efficient communications systems.

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Softswitch shipments at \$449.5 million in 2001 are expected to reach 4.4 billion by 2007.

Companies Profiled

3Com
@boyd:Hotsip
Alcatel
Clarent
Comgates
Congruency
Convergent Communications
Convergent Networks
CopperCom
DSP Group
Cisco Systems
Ericsson
ETSI Tiphon
Fujitsu
Intel
ipGen
IP Unity
ipVerse
Internet & Telecoms Convergence Consortium
Internet Engineering Task Force
ITU
Lucent Technologies
NEC
Netrix Corporation
Nortel
Nuera
Oki Network Technologies
Performance Technologies

Pactolus Communication Software
Radcom
RAD Data Communications Ltd
Siemens
Sonus Networks
Sun Microsystems
Telcordia Technologies
Telica
TimesTen
Texas Instruments
Unisphere Solutions
VocalTec
White Pajama

REPORT METHODOLOGY

THIS IS THE ONE-HUNDRED NINTH 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. MARKET SHARE ANALYSIS INCLUDES CONVERSATIONS WITH KEY CUSTOMERS OF PRODUCTS, INDUSTRY SEGMENT LEADERS, MARKETING DIRECTORS, DISTRIBUTORS, LEADING MARKET PARTICIPANTS, 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 OPINION LEADERS IN THE MARKET SEGMENT.

SOFTSWITCH CONVERGENCE OF VOICE AND DATA BRINGS NEW OPPORTUNITY TO TELECOMMUNICATIONS SERVICE PROVIDER MARKETS

YOU MUST HAVE THIS STUDY

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ABOUT THE COMPANY

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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 AND THE TOP TEN TELECOMMUNICATIONS MARKET ANALYSIS AND FORECASTS.

SUSAN EUSTIS, PRESIDENT, CO-FOUNDER OF WINTERGREEN RESEARCH, HAS DONE RESEARCH IN COMMUNICATIONS AND COMPUTER MARKETS AND APPLICATIONS. SHE HOLDS SEVERAL PATENTS IN MICROCOMPUTING AND PARALLEL PROCESSING. SHE IS THE AUTHOR OF RECENT STUDIES OF THE REGIONAL BELL OPERATING COMPANIES' MARKETING STRATEGIES, INTERNET EQUIPMENT, A STUDY OF INTERNET EQUIPMENT, WORLDWIDE TELECOMMUNICATIONS EQUIPMENT, TOP TEN TELECOMMUNICATIONS, DIGITAL LOOP CARRIER, WEB HOSTING, AND APPLICATION INTEGRATION MARKETS. MS. EUSTIS IS A GRADUATE OF BARNARD COLLEGE.

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