

Following is a synopsis of analyst research from the past two months that may be of interest to those in the Service Provider Mobility Community.

- **Infonetics, Update to Mobile Backhaul report.** Mobile backhaul equipment investments jumped a healthy 59% in 2008 to \$3.7 billion worldwide, and Infonetics forecasts another 60% jump in 2009 to \$5.9 billion.
- **Infonetics (Continuous Research Service), Perspective on WiMAX market.** In 3Q09, the overall WiMAX equipment and device market was up 11.4% from 2Q09, reaching \$290.2M; this is the second consecutive quarter of revenue growth, following three consecutive down quarters. This is still down from the 1Q08 market high of \$332M, but it is a slightly better performance than the flattish quarter we predicted.
- **Heavy Reading, Evolved Packet Core for LTE.** This report provides a roadmap that charts how network operators will migrate to LTE, and how that migration will shape their core networks. It identifies the key technology and deployment issues and assesses the technology platforms and choices for EPC network elements. The report also includes Heavy Reading's first-ever five-year forecast for the mobile packet core sector and analyzes the EPC product strategies of 12 leading mobile network equipment suppliers. The tone of the section on Cisco is reserved, in part because of the pending Starent acquisition.
- **Infonetics, IMS market quarterly update.**
- **Perspectives on Cisco intent to acquire Starent from Infonetics, Ovum, Canalys, IDC, Current Analysis, Springboard.** Mostly positive.
- **Ovum, WiMAX in Emerging Markets.** WiMAX has so far struggled to establish a foothold in the mature markets of Europe, North America and Asia, and many view the emerging markets, with their low fixed-line penetration, as the key hunting ground for WiMAX. However, the combination of several factors including technology evolution, cost, coverage, vendor support and service provider choices limit WiMAX's future potential as a mass-market broadband technology in emerging markets. As a result, WiMAX will remain a niche technology, forming part of established fixed and mobile operators' broader broadband access portfolios.
- **Infonetics, FMC and Femtocell equipment report/forecast.** Combined, sales of FMC network element equipment and femtocell equipment are forecast to grow to \$7.4 billion worldwide by 2013. The number of 2G and 3G femtocells sold for use in GSM/GPRS, CDMA, W-CDMA/HSPA and CDMA2000/EV-DO networks is expected to increase five-fold from 2009 to 2010.
- **Current Analysis, Assessment of Clearwire.** CA is "slightly positive" on Clearwire.
- **Dell'Oro Group, Quarterly Mobility Market Report.**
- **Current Analysis, Enterprise Femtocells.** Suggesting that the space has been rather quiet recently runs contrary to recent femtocell-related announcements from the likes of Airvana, picoChip, Percello and SpiderCloud.
- **Yankee Group, Preparing for 4G and Video.** Mobile IP traffic will be dominated by video in 2013. Network operators need to begin planning today for the business models and network architectures that will make video services profitable without sacrificing user experience. The report includes mention of Cisco's Visual Networking Index, as well as a chart based on the VNI.
- **Yankee Group, Mobile Broadband Exceeds Fixed Broadband in Emerging Markets.** After nearly six years of fixed broadband leading the way, mobile broadband penetration will exceed fixed in 2009 and for the foreseeable future. Operators must prepare their networks, their marketing departments and even their regulatory departments for the change.
- **Ovum, LTE Business Case: Conclusions and Recommendations.** This is the last of a series of reports on the business case for LTE. [Ovum's] recent research into the business case for LTE reveals that operators need to clarify their plans for LTE in order to pursue the near-term goal – spectrum acquisition. However, actually implementing LTE presents different challenges, not all of which need to be addressed immediately.