



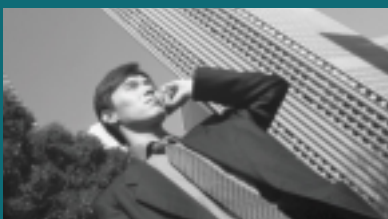
*Mobile and  
Wireless  
Communications*

*remote access*



*ISPs and  
the Internet*

*Broadband  
Communications*



*Traditional and  
New Carriers*

*Corporate Voice,  
Data and Video  
Networking*

# TELECOM MARKETPLACE

# SHAPING THE NETWORKED ECONOMY

## A VIBRANT TELECOM MARKETPLACE

Telecom and networking has become the lifeblood of modern business. And in the transition from corporate support service to a source of strategic advantage, the telecom and networking industry has now become one of the most profitable businesses within the global marketplace.

The global telecom market today is worth well over one trillion dollars, and will continue to grow. Yet the market is in turmoil, with significant changes imminent. Opportunities for start-ups remain strong, but acquisitions continue to flourish. As technology continues to change at high speed, the proliferation of the Internet and e-commerce keeps the telecom industry in constant motion.

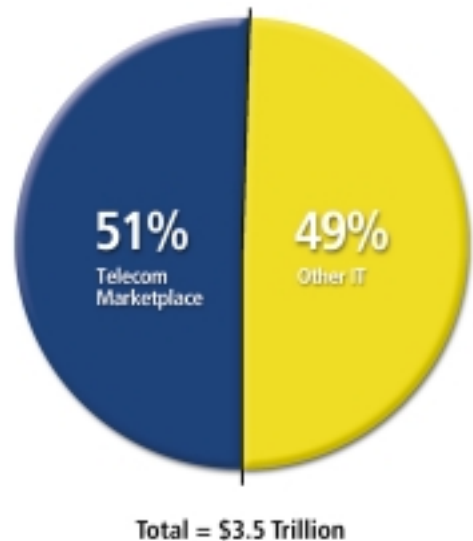
## YOUR OPPORTUNITIES AND CHALLENGES

If you are in the telecom industry, you must understand the forces that shape the market. The opportunities are booming, but the market is volatile. How can you ensure that your company will survive?

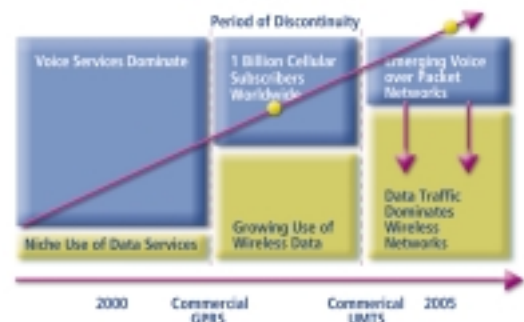
- What are the opportunities for e-commerce applications over mobile networks?
- How will competitive forces in telecoms and services affect local ISPs and Web hosts?
- What will become the standard for service providers deploying Voice over IP services?
- How does the migration of traffic from circuit to packet switching affect the network infrastructure market?
- What new network designs will be required by the networked economy?

No matter if you're a business executive, marketer or technologist, Gartner's telecom marketplace can help you address the above pivotal questions.

## WORLDWIDE IT MARKETS BY SEGMENT – 2003



## THE CHALLENGE FOR CELLULAR OPERATORS

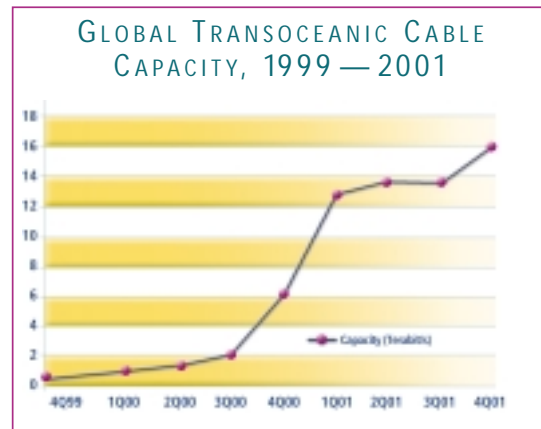
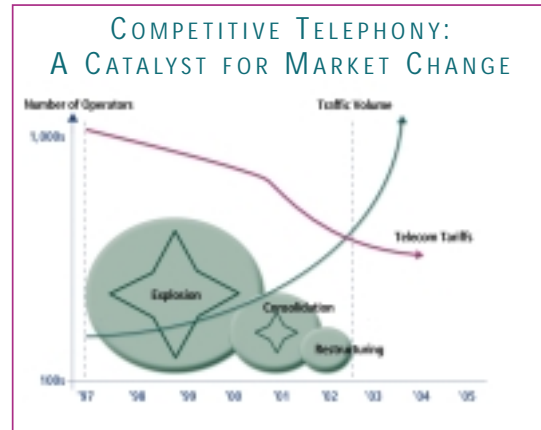


## WHAT IS TELECOM MARKETPLACE?

Gartner has combined all of its global telecom research and services capabilities and resources into one telecom marketplace practice, designed specifically to support telecom equipment suppliers and service providers. It includes:

- Mobile and Wireless Communications
- ISPs and the Internet
- Traditional and New Carriers
- ASPs
- Broadband Communications
- Remote Access
- Corporate Voice, Data and Video Networking

Our mission is to help you achieve your business goals by providing integrated solutions and offerings that contribute directly to your overall success.



## WHY GARTNER?

Gartner has the strongest research, analyst and consulting team in the telecom and networking industry. More than 260 analysts and consultants in 18 countries provide an unmatched breadth and depth of telecom coverage to rapidly changing areas such as VoIP, converged networking services, optics, signaling, security, VPN, policy-based networking, wireless services and remote access.

Gartner is the only company independently covering all areas of IT, allowing the widest perspective and consideration of total business potential. Within each IT and related business area, Gartner has analysts who understand the supply and demand side of the market. We also understand the effects of intranets and the Internet on emerging application requirements, and realize the premium that is placed on reliable LANs and WANs that can survive escalating bandwidth demands. Whether you are developing and marketing telecom products or providing telecom services, Gartner is here to help you make the right decisions. We can help you discover, create and implement breakthrough business strategies to define new markets, enhance growth opportunities and achieve an overall competitive advantage. Our unrivaled thought leadership and independent, objective analysis empower you to make business decisions with confidence.

# TELECOM MARKETPLACE

## *Supporting your key job functions and issues*

The telecom and networking industry is experiencing change, including a significant shortage of human resources and skills. To address these problems, Gartner can support all of your key job functions and issues by providing custom solutions to meet your specific needs.



## EXECUTIVE STRATEGY AND PLANNING

### *Creating strategies for success*

When it comes to telecom strategic and business planning, Gartner is the only name you need to know. We offer executive guidance on business alignment, organizational effectiveness and business development, particularly in global markets. Gartner can also provide crucial insight on acquisitions, partnering and alliance strategies.

- Strategic Planning and Business Strategy
- Acquisitions and Alliances
- Business Alignment
- Organizational Development and Effectiveness
- Business Development
- Business Risk Management
- Financial Impact
- Global Market Strategy

- What are the main opportunities and threats?
- What are the strategies to maintain earnings in an era where bandwidth will increasingly become a commodity?
- Which business model allows your organization to profit in this new world order?
- Which partners will you need in order to provide a complete and competitive offering in the future?
- How do you expand internationally?
- How will the Internet impact your business?

Through **2003**, enterprises that do not competitively bid for their remote-access services will risk overpaying by between two and 20 times.

VoIP will eventually become the **price-leading** most fully featured premium voice service offering.



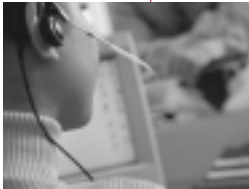
## SALES AND MARKETING

### *Leveraging market opportunities*

Gartner offers comprehensive global market data, analysis and advice to track your opportunities and keep you focused on your competition. We can augment your marketing with everything from strategies to market testing to effective marketing communication and public relations. We can also help train your sales force and work with you to develop competitive sales strategies and effective sales channels.

- Market Analysis and Strategy
- Product Marketing
- Competitive Analysis
- Customer Relationship Management
- Sales Strategies and Distribution Channels
- Business and Market Planning
- Training and Education
- Marketing Communications and Public Relations

- How can your company defend margin for existing products while capturing a share of new markets?
- What will happen to prices in your market?
- What type of channel partners should you work with?
- How is your organization perceived in the market, and how satisfied are your customers?
- Which new markets and industries should you enter?
- How should you position your offers in the marketplace and vis-à-vis your competition?



## PRODUCT DEVELOPMENT AND SUPPORT

### *Providing leading-edge products and services*

With time-to-market a crucial factor, Gartner is well positioned to help you develop winning product and support strategies. Understanding the best architectures and technologies to build into your products and services is crucial for competitive edge. At Gartner, understanding this is one of our unique strengths. We can help you manage difficult make vs. buy decisions, and also help you measure customer satisfaction and loyalty.

- Technology Direction and Assessment
- Customer Satisfaction
- Product and Support Strategy
- Product Development
- Services Creation
- Make vs. Buy
- Benchmarking

- Which future technologies will delight your customers, and which will lead to a dead end?
- How can you convert technology possibilities into marketable products?
- How can you manage the transition between legacy infrastructure products and next-generation networks?
- How do you maximize the profitability of your product lines?
- How well will your new products sell?
- How can you use customer service as a competitive edge?

# WHAT VALUE DOES GARTNER BRING TO YOU?



## Research and Analysis

At Gartner, we provide our clients with the kind of insightful research and actionable advice you expect from an industry leader: clear, concise and comprehensive. Gartner Dataquest research, leveraging its world-class quantitative capabilities, provides insight and expert advice on the forces that shape the telecom marketplace. Additionally, Gartner research provides independent insight that your customers rely on to make decisions about the products, vendors and technologies that support their businesses and telecom infrastructures.



## Consulting

Adding strength to the core competencies in key areas such as technology assessment, network strategy and strategic planning, Gartner now offers an even broader range of highly customized consulting capabilities. Gartner Consulting now spans all aspects of the telecom marketplace — from marketing strategy, new product planning, competitive analysis, image assessment to customer satisfaction surveys and joint venture partnering. Additionally, we recently developed competencies in network planning and design, enabling us to provide you with more strategic consulting that is focused on your critical markets and better equipped to help you determine why business is won or lost.



## Measurement

Gartner Measurement provides a suite of services that help you address efficiency, effectiveness and alignment analyses, as well as management and business issues. We provide services that will enable you to benchmark your own IT performance in all key functional areas of an MIS center. We can benchmark for you or your customers the call center, help desk, and enterprise network and telecom environments. Gartner is the acknowledged marketplace leader for measurement services and depth of comparative analysis on a global basis.



## Decision Tools

Gartner provides its user clients with powerful analytical rating tools, designed to help in the vendor selection process. We base our recommendations on comprehensive weightings and detailed product information. Technology suppliers hoping to augment their marketing, product development and sales activities can use these same tools. Gartner is also the acknowledged leader in providing total cost of ownership (TCO) tools and models, including network software.



## Events

As the world's largest conference provider, Gartner takes pride in providing face-to-face interactions with Gartner analysts, unique networking opportunities, and opportunities for vendors to showcase their products and services. You can learn about the most recent trends, analyses and predictions for the future of the telecom marketplace at our worldwide symposia as well as a host of telecom marketplace events.



insight for the  
connected world

## ABOUT GARTNER

In the new connected economy, where the rules of business change as quickly as they are created, the ability to make timely decisions means the difference between your organization's success or failure. Yesterday's start-up is tomorrow's industry leader — and your new competition. Making, managing and adapting decisions at the speed of business is critical. Gartner provides advice and insight to support competitive decision making, guiding your company to success.

Gartner can help your organization succeed in each complex stage of the business life cycle. No matter what your business requirements entail, we will help you make the decision to navigate through the complexity, anticipate potential breakdowns and barriers, and implement your business strategies, quickly, efficiently and cost-effectively. Timing is everything — and Gartner delivers the advice you need, when you need it.

Since 1979, Gartner has been helping clients make and manage the best decisions for their business. Headquartered in Stamford, Connecticut, our 80 locations across the globe allow us to maintain an international focus and the ability to work with companies worldwide. The name Gartner has become synonymous with our group of the brightest IT minds in the industry — our 1,200 research analysts and consultants.

Your organization's success depends on your ability to adapt to the constant changes of the business world. Gartner's experience, confidence and unrivaled thought leadership can help you make the right decision — now and in the future.

For more information about Gartner's industry-leading research capabilities, consulting and measurement services, and world-renowned symposia and events, please visit us on the World Wide Web at <http://www.gartner.com>.

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