The Telecom Equipment Europe Cluster delivers detailed coverage of the public network infrastructure, mobile network and enterprise communications environments as implemented within the EMEA region. These environments are undergoing rapid and substantial changes because of the explosive impacts of enabling Internet, optical and mobile technologies. The Cluster delivers strategic and tactical business decision support for companies supplying (or investing in) network infrastructure, access technologies, converged enterprise infrastructure and associated professional services. Actionable advice is also given to distributors and integrators of products implemented within the EMEA region. Supported by end-user research, key areas of market opportunity are also assessed.

Cluster programs deliver industry-specific business planning statistics, forecasts and analysis. Clusters enhance the broad range of Gartner analysis available in Core Research by providing in-depth information of unique interest to companies competing (or investing) in the industry covered by the Cluster.

Scope of Coverage

The Telecom Equipment Europe Cluster spans the markets for infrastructure used in wide area, metropolitan and mobile networks, including transmission and switching equipment, plus access technologies, enterprise equipment and consumer devices. These markets continue to undergo substantial change as existing and traditional networks and access techniques evolve from circuit-oriented architectures to Internet Protocol (IP) based multimedia, multiservice, packet-oriented architectures. Clients will receive actionable advice on business strategies associated with communications applications with information on key market trends and vendor positioning.

Market Segmentation

- Enterprise communications—Detailed quantitative and qualitative analysis of Networking and communications systems and applications markets, including voice and call center communications equipment and application, and networking infrastructure equipment.
- Mobile terminal device development—Assessing the scale and diversity of the market for mobile communications terminals; the driving factors behind evolving form factors, capabilities and cost; regular analysis of key players, including market share positions
- Public network infrastructure—including next-generation switched networks, broadband access, metro Ethernet, optical transport, access and switching networks, soft switches, OSS, BSS and associated network management.
- Mobile infrastructure development—Detailed qualitative and quantitative analysis of the evolution of core network and radio access elements; including expert views on the migration paths, key players and alternative business models used to finance costly infrastructure investments.

Key Business Issues

- What opportunities arise from convergence around IP infrastructures in both wide area and local area networking?
- How will the Unified Communications market develop?
- What contact center technologies will companies invest in, and how should vendors position themselves to be successful?
- How are mobile device markets developing?
- How will mobile and fixed public network infrastructure markets evolve over the next five years?
- How will new broadband and mobile access technologies impact the market?
- How will developments in optical networking affect network evolution?
- How will soft-switch developments affect network evolution?
- How must vendors reposition to be successful?
Product Segmentation

- Enterprise networking equipment including Ethernet switches, wireless LAN equipment and application acceleration appliances
- Enterprise WAN edge equipment Secure Broadband Routers, VPN Access Equipment, Mid-range VPN Equipment, Enterprise VPN Concentrators, traditional Backbone and Access Routers.
- Enterprise voice systems including PBXs, voice/data converged IP-PBX systems and IP business phones.
- Contact center systems, including call center, self-service IVR solutions, Speech recognition and software suites
- Mobile Terminal Forecasts, sales to end-users and revenue by:
  - Device type—Basic voice, enhanced voice, smart phone, wireless PDA
  - By Bearer standard (e.g. CDMA, GSM, W-CDMA etc.)
- Mobile Terminal Market Share
  - Quarterly deliverable by vendor, by region
- Mobile Infrastructure Forecasts
  - By Equipment type—macro, micro and pico base station, base station controllers, mobile switching centers and packet data gateway nodes
- Fixed Network infrastructure Forecasts
  - NGN Optical transport, SDH/SONET, WDM, Metro Ethernet
  - Softswitches, next-generation switching elements, Application Servers and IP-Centrex platforms
  - Multi-service switches, IP core routers, Media gateways and session border controllers
  - Broadband access, xDSL, WiMAX, FTTx, Cable
  - VoIP and Triple-play platforms, voice, video and data

Geographic Coverage

Statistical geographic coverage varies by technology, reflecting the degree of market activity for a given application within each region. In each of the industry segments listed, an assessment of market size and forecast of implementation trends is provided for Western Europe. An accompanying market shares analysis for the region is also provided for key technologies within an industry segment. In many key technologies, analysis has been extended to also cover the Central and Eastern Europe and Middle East and Africa sub-regions. Where applicable, a statistical roll up for the total Europe, Africa and Middle East (EMEA) region is provided.

Note: Detailed country-level breakouts targeting the most significant and dynamic markets for the key technologies within a given segment are also provided.