

## **Forecast: Enterprise Ethernet services, Asia-Pacific BY Aarkstore Enterprise**

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AP's Ethernet market continues modest growth in Japan on a large base: revenues of \$5.1B in 2008 will reach \$7.5B by 2014. A few other developed markets have high penetration rates but bandwidth growth and new verticals will push these markets as well.

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Executive summary

In a nutshell

Ovum view

Ethernet services will swim up against the downstream telecom current in 2009

Forecast summary

AP enterprise Ethernet service market projected to reach \$11.8 billion in 2014

Results for 2008

AP (excluding Japan) achieved solid 23% growth in CY08

Japan

AP (excluding Japan)

Long-range market forecast drivers and barriers

Ethernet driven by enterprise demand, applications, and technology substitution

Enterprise demand

Applications

Competitiveness

Technology enablers

Potential inhibitors: economic doldrums, consolidation

Ethernet services segmentation forecasts

Segment highlights include EFM, T1/E1 replacement, the GigE community, EVPL and VPLS segments

Regional forecasts

Japan leads the way

Carrier snapshots

Verizon Business

Reliance Communications

SingTel

Spectrum of carrier strategies

Both full-line and niche/point strategies are working

Service mix

Access

Geographic scope

Carrier-grade demarcation

Fiber rollout

Portals

Interconnect approach

Technology platforms

Market scenarios and early warning signs

Depth and length of the macroeconomic correction is key to forecast direction

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