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## **Disruptive Analysis**

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*Don't Assume*

### **VoWLAN Business Models:** How the wireless VoIP market catalyses fixed-mobile convergence

***June 2005***

Author: Dean Bubley, Founder

## The report

Published in June 2005, Disruptive Analysis' new report, "**VoWLAN Business Models: How the wireless VoIP market catalyses fixed-mobile convergence**" is the most comprehensive review of the market for voice-over-WLAN products and services available with detailed analysis and recommendations.

The study provides rigorous argument and detailed quantitative forecasts of the future of VoWLAN. It assesses residential and corporate usage cases, both standalone and in "dual-mode" form with cellular telephony. The report examines the role of VoWLAN in driving forward various fixed-mobile convergence (FMC) business models.

Based on a research effort spanning 200+ interviews with key providers of handsets, network services, semiconductors, operator infrastructure and corporate networks, the study provides actionable, substantiated insights into this nascent market.

### Key questions answered by the report

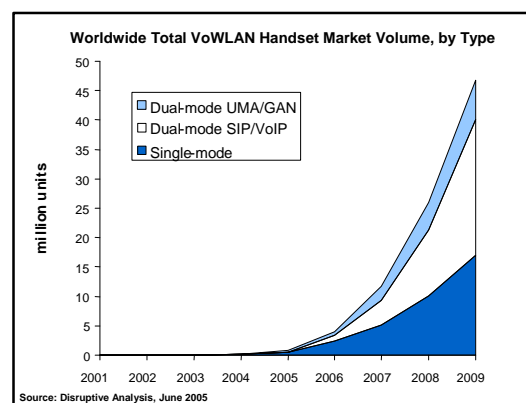
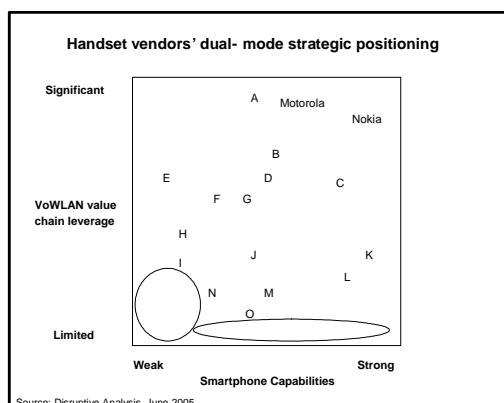
- Does VoWLAN pose an opportunity or threat to mobile operators?
- What are the practical issues that could derail new service launches?
- Can fixed operators use VoWLAN to recapture revenues from mobile?
- What are the differences between VoWLAN in enterprise and residential markets?
- What are the underlying drivers for FMC and VoWLAN?
- Which other FMC approaches and technologies compete with VoWLAN?
- What will be the market size for VoWLAN phones and subscribers?
- Is UMA a viable solution for VoWLAN? Or is it just a stop-gap?
- Is "seamless roaming" really that important?
- What will be the role of dual-mode, WiFi-enabled smartphones?
- Is the market for VoWLAN-only phones important?
- Who are the market leaders in providing VoWLAN and FMC solutions?
- How can VoIP service providers and IP-PBX vendors gain leverage?

### Selected topics and forecasts covered in the report

- Market forecasts for 2005-9 for single- and dual-mode VoWLAN phones and users.
- Segmentation and quantification by enterprise vs. consumer, and UMA vs. SIP-based solutions.
- Advantages and disadvantages of key mobile operator, fixed carrier and enterprise-based VoWLAN solutions.
- Competitive positions in handsets, IP-PBXs, network equipment and WLANs.
- Specific actionable recommendations for each group of market participants.
- Practical and commercial factors impacting uptake of technically-capable solutions.
- Case study and analysis of BT Fusion, one of the first operator FMC launches.

## Who will benefit from the report?

- **Mobile handset suppliers:** understand the opportunity for dual-mode phones, and the key issues for user and operator acceptance .
- **Mobile operators and MVNOs:** assess the threat of competitive wireless VoIP offerings, and understand if UMA or SIP better protects your revenue streams in the short and longer terms.
- **Fixed operators and competitive carriers:** examine the potential of VoWLAN to reverse fixed-mobile substitution and form the basis of new services, in residential and enterprise context.
- **Broadband and cable service providers:** evaluate alternative approaches to exploiting the VoIP and cellular opportunities, on your own or with partners.
- **ISPs and VoIP specialists:** gain insight into how VoWLAN can help you win a slice of both fixed and mobile businesses.
- **IP-PBX vendors:** understand the different business models emerging for enterprise FMC platforms, and whether cellular solutions pose a threat.
- **WLAN equipment suppliers:** learn how to leverage the growth in WLAN deployments by optimising your products and marketing to support voice.
- **In-building wireless systems suppliers:** determine whether you should be focusing on indoor cellular solutions, or embracing VoWLAN as a key part of your offering.
- **Semiconductor vendors:** quantify your market opportunity for handset-based WLAN, and assess the requirements for different types of devices.
- **Cordless telephony manufacturers:** assess the threat to conventional cordless posed by VoWLAN.
- **Mobile software suppliers:** understand the key software and user interface needs for emerging VoWLAN phones.
- **Enterprise IT and telecoms departments:** gain insight into the potential benefits of VoWLAN – and the possible practical issues that may limit its near-term deployment.
- **Investment banks:** gauge the likely impact of VoWLAN at various points in the value chain, and understand potential indirect impacts on operator service pricing and profitability.
- **Venture capital firms:** identify necessary new components of the VoWLAN ecosystem, and understand bottlenecks that could impede development of early business models.
- **Consultancies and integration houses:** gain insight into the key issues in deployment of FMC solutions, for both service providers and enterprises.
- **Regulators:** gain early warning of the changes that FMC and VoWLAN could bring to existing national and international markets for VoIP and mobile services.



## About Disruptive Analysis

Disruptive Analysis is a pioneering technology-focused advisory firm. Founded by experienced analyst Dean Bublely in 2002, it provides critical commentary and consulting support to telecoms/IT vendors, users, investors and intermediaries.

Disruptive Analysis focuses on communications and information technology industry trends, particularly in areas with complex value chains, rapid technical/market evolution, or labyrinthine business relationships. It provides its clients with advice and analytical opinion on topics such as technology business models and go-to-market strategies, "addressable market sizing", planning validation and due diligence.

Currently, the company is focusing on the wireless and mobility marketplace, alongside additional research on networks, VoIP, telecom OSS and enterprise IT. Recently, it has focused on the potential for convergence of cellular, WLAN and fixed communications in a new breed of devices, services and networks. Other hot topics currently being researched include in-building wireless, mobile handset software, MVNOs, and VoWLAN products and business models.

Vendors and users of telecoms and IT products & services face a plethora of published information and analysis on trends, technologies, companies and markets. Much of this data and comment is too generic - and most of it ignores hidden factors that will ultimately separate hype from reality. Risk factors are ignored or downplayed, upsides and innovation go unconsidered.

Disruptive Analysis attempts to predict - and validate - the future direction and profit potential of technology markets - based on consideration of many more "angles" than is typical among industry analysts. We take into account new products and technologies, changing distribution channels, customer trends, investor sentiment and macroeconomic status. Disruptive Analysis' motto is **"Don't Assume"**.

[www.disruptive-analysis.com](http://www.disruptive-analysis.com)

## About the Author

Dean Bublely is the Founder of Disruptive Analysis, an independent technology industry analyst and consulting firm. An analyst with over 13 years' experience, he primarily specialises in wireless, networking, and telecoms fields, with further expertise in certain aspects of the software, semiconductor and IT hardware sectors. His present focus is on wireless technology, especially the evolution of mobile device architecture & software, fixed-mobile convergence, shifts in service provider value chains, enterprise mobility, in-building technologies, wireless broadband, and the integration of cellular and WLAN technologies.

Mr Bublely has extensive experience in both published analytical research and bespoke consultancy, and has regularly spoken at industry conferences and events. He holds a BA in Physics from Keble College, Oxford University.

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## **Companies mentioned in the report include:**

Agere, Alcatel, Aruba, Atheros, Avaya, Azaire, BenQ, BellSouth, Boingo, BridgePort, Broadcom, BT, Cicero, Cingular, Cisco, Colubris, D-Link, Ericsson, Flextronics, Hitachi Cable, HP, i-Mate, Inventel, ip.access, Kineto Wireless, KT, LinkSys, LongBoard, Meru, Microsoft, Moimstone, Motorola, NEC, NetGear, Nokia, Nortel, NTT DoCoMo, PalmOne, PalmSource, Panasonic, Philips, Proxim, Qualcomm, RadioFrame, RIM, RTX, Samsung, Saunalahti, Senao, Skype, Siemens, SonyEricsson, SpectraLink, Square7, Symbol, Symbian, Talktelecom, Tatara, TeliaSonera, Texas Instruments, T-Mobile, Trapeze, TTPCom, UTStarcom, Vocera, Vodafone, Vonage, WiFon, Wistron, Zynetix, ZyXel, 3Com

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