

## Enterprise Ethernet Services

### Forecast for Asia-Pacific region

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Dear Colleague,

The enterprise Ethernet services market is healthy across Asia-Pacific. Initially motivated by private-line replacement, Ethernet spreads to support any-to-any connectivity at much higher bandwidths and lower costs than feasible across legacy platforms.

Drivers include: enterprise interest in managing their own IP routing, simplifying WAN management, keeping costs in check, and supporting applications like real-time city-to-city transactions, workforce collaboration, virtualization, and business continuity.

Regionally, the Ethernet market continues to see modest growth in Japan on a large installed base: we expect revenues of \$5.1 billion in 2008 to reach \$7.5 billion by 2014. A handful of other developed markets already have high penetration rates but bandwidth growth and extension to new verticals will push these markets as well. South Korea's revenues, for example, should grow from \$0.2 billion in 2008 to roughly \$0.7 billion by 2014. AP's big emerging markets, China and India, face mixed prospects.

China is smaller than earlier estimated but we still expect good growth from a 2008 base of \$0.46 billion to \$1.01 billion in 2014. The Indian market was tiny in 2008 at \$0.07 billion, but global players also building out their domestic base — notably Reliance, Tata, and Bharti — will help push this to \$0.58 billion by 2014.

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