

Telecoms in 2020: components

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Abstracts

Ovum's vision for the long-term future of telecoms component suppliers based on the core Telecoms 2020 scenario includes adding power consumption as a critical differentiator; developing multi-level transmission products for the network core; establishing high-volume, low-cost strategies for products currently in the network core as they are tomorrow's access products; increasing optoelectronic integration; and establishing greater cooperation up and down the food chain.

Contents

Executive summary

In a nutshell

Scope

Ovum view

Innovation required to move hotspot components onto different curves; cannot rely on Moore's Law

Multiple hotspots span core and access networks

Industry structure generally in good shape but needs to slim down in FTTx

Greater industry cooperation increases development efficiency

Key messages

Recommendations for components market players

Telecoms components in 2020 – the broad view

Components are key enablers for LEAN operators in 2020

Components industry overview

Transport will use complex transmission and signal processing

Broadband access in 2020 will be fiber-based

Packet-processing technology will be pushed for power reductions

Technology roadmaps

Optoelectronic integration moves from today's high-end to volume markets in 2020

Cross-silo design optimization represents new potential to exploit

Power savings will come to the core network relatively late

As services become more content-centric, storage continues to be the alternative to network transit

Larger semiconductor roadmap has tools to borrow

Component industry structure/player positioning

Components require supporting ecosystem to thrive

Vertical integration down to chip level is costly but beneficial

Competition from system OEMs is a reality

Horizontal integration between optical component markets leads to many choices

Combining optics and electronics in one supplier – time to try again?

SWOT analysis of telecoms components in 2020

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Weaknesses

Opportunities

Threats

Components suppliers

The world of 2020

End devices and programmability will keep large semiconductor vendors in telecom
The core network will continue to rely on mid-sized specialty semiconductor houses

Components supplier development timeline

Development timeline

2009–2012

2013–2016

2017–2020

Components customers and markets

Increasing collaboration on roadmap

The world of 2020 by segment

WAN customers

Datacom customers — Cisco dominates

Access customers

Preference for local vendors

Continued rise of China

Japan as a market is closed

Indian system vendors push for domestic components

Components services, revenues, and margins

The world of 2020

Best-in-breed products

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Optoelectronic integration

Best-in-breed service

Components market development timeline

Development timeline

2009–2012

2013–2016

2017–2020

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