WiMAX, Portability, & Proprietary Market Analysis

State of the Market

2003 - 2008

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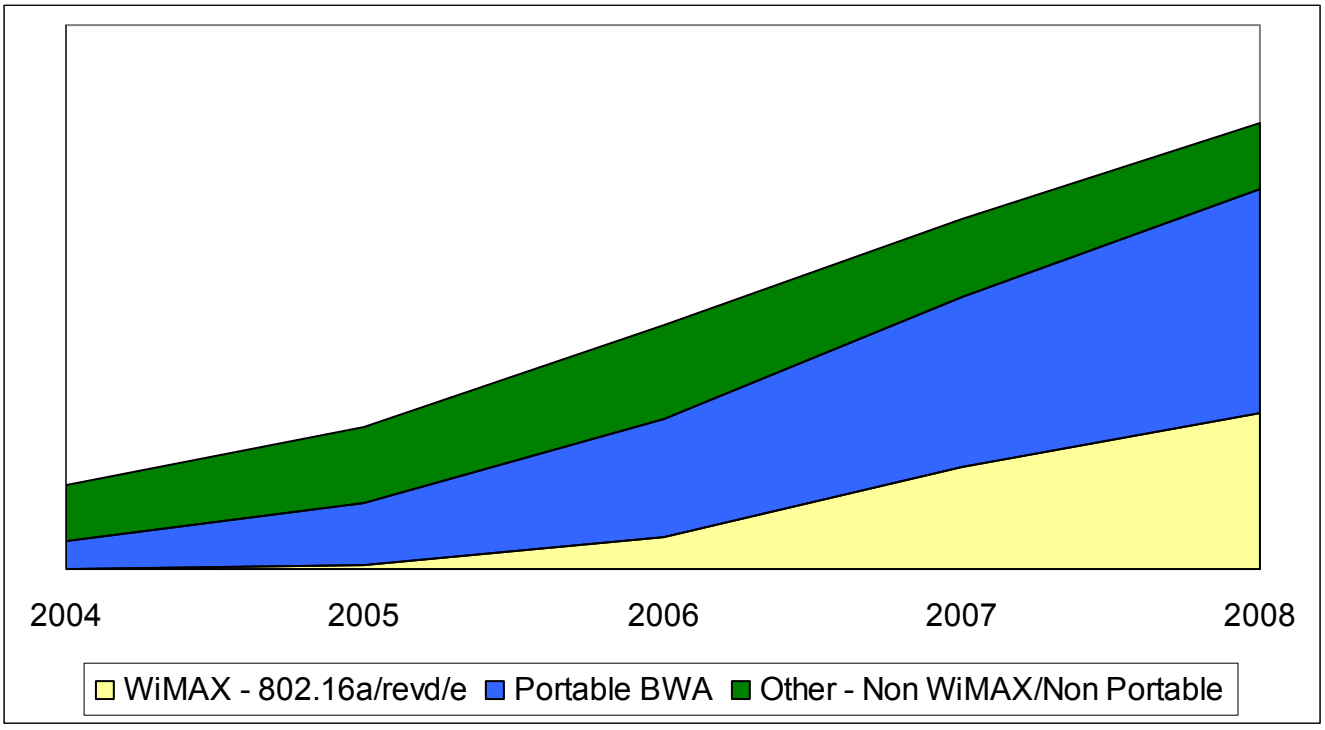
Report Summary

In 2003, the BWA industry went through a metamorphous of sorts, as an industry filled with proprietary solutions, saw a collaboration of vendors and two different, but complimentary standards started to emerge. The results were WiMAX, based on 802.16 and the developing 802.20 standard, a truly mobile broadband data solution. Although WiMAX radios were not shipping in 2003, these radios will generate revenue as proprietary radios are converted to WiMAX radios. Certified WiMAX/802.16d radios will start shipping in 2005 and continue to ramp aggressively throughout the forecast. Although WiMAX is expected to represent a significant share of BWA revenue, portable radios will have a larger piece of the market over the next five years. A number of factors, including currently available radios that meet important cost objectives, drive this leadership position. The BWA landscape changes dramatically by 2008 as WiMAX and portable non-WiMAX radios take hold, pushing the BWA market over $2 billion in equipment revenue.

Share of Portable, Proprietary, & WiMAX(802.16a/d/e) ~ 2004 -2008



Source: Sky Light Research

Sky Light Research's (SLR) report takes the reader through its thought process, leaving no holes in revenue conclusions. The report is a bottoms up look at the market and provides historical, current, and future trends for proprietary, WiMAX, and portable radios. It shows the

cross over rate from proprietary radios to WiMAX, as well as the take-up rate for portable radios. The report provides an in-depth, look at market share, drivers, challenges, five-year forecasts, bill of materials for CPEs, number of subscribers, number of base stations, and cost per user comparisons for each radio type. The report is one section of a larger report that not only examines global WiMAX, portable and proprietary radios but also examines frequency, CPE, base station, and regional trends. The report has received excellent reviews from its regular subscribers, and is sure to provide a clear, uncomplicated view of the market.

Report Specifications

For this analysis, the Broadband Wireless Access (BWA) market includes point-to-multipoint systems that operate under 10 GHz and provides broadband Internet downloads of at least 384 Kbps. The analysis does not include 802.11 products. (For further clarification, please refer to the segmentation tab in the market share and/or forecast reports.) Services are not included, only equipment revenue.

SLR takes careful consideration only to include those products that are PMP wide area radios and not WiFi (WLAN, indoor) or WLL (WAN under 384 Kbps). Therefore, some publicly traded companies will have less revenue than publicly reported due to the stringent model that SLR applies to insure an equal product comparison among the different radio vendors. SLR only includes commercial revenue and not revenue from orders or trials in the report.

Revenue from IP based 3G applications in cellular bands are not included in the report. These solutions are from vendors like IP Wireless and Flarion. These solutions will be added to the report IF they are used in a fixed or portable application and frequency. For example, if IPWireless makes a sale with a mobile operator for a 3G application in 1.9 GHz, this will not be included in the BWA report. However if the application is for fixed or portable BWA in 2.5 GHz, then revenue will be included. In short, frequency placement will be the determining factor. Frequencies viewed as BWA include: 900 MHz, 2.0 GHz, 2.3 GHz, 2.4 GHz, 2.5 GHz, 2.8 GHz 3.5 GHz, 5.2 GHz, 5.7 GHz, 5.8 GHz.

BWA
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Table of Contents:

List of Figures

List of Tables

Segmentation

The following is an example of the types of radios that are considered BWA for this report.

Table 6. BWA Point-to-Multipoint Radios (384 Kbps+ & Under 10 GHz)

Types of Companies	Types of Products
Axxcelera	AB Access
AirSpan	AS4000, AS4020, WipLL (acquired from Marconi in 4Q 02)
Alvarion	WALKair 1000, BreezeAccess, eMGW
Aperto Networks	PacketWave
BeamReach	BeamPlex System
Cambridge Broadband	VectaStar 3500
Harris	ClearBurst MB
ioWave	
IP Wireless	Total Network Solution
L3	PrimeWave 3000
Marconi	MDMS, WipLL (WipLL through 3Q 02)
Motorola	Canopy
Navini	RipWave
SR Telecom (Netro)	Angel, AirStar, SR500 with Broadband Module
NextNet	Expedience
Proxim	Tsunami PMP
Soma Networks	Amosphere
REMEC	ExcelAir 70
Trango Broadband	Access 5800, FOX5800
Vyyo	V251 Wireless Modem, V3000 Wireless Hub
WaveRider	LMS2000, LMS2001, LMS4000, LMS3000
Wi-LAN	Libra 3000, Ultima3, AWE Family

Source: Sky Light Research