



Q&A: Dr Hamadoun Touré, secretary general, ITU

The Business of Communications

A **CYBER MEDIA** publication

# FAILS AGAIN

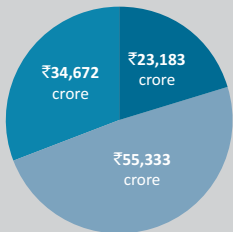
For the second consecutive year Indian telecom equipment industry falls flat

- Carrier equipment down 5%
- User device remains stagnant
- Enterprise equipment up 9%

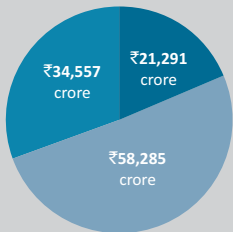


VOLUME-1

## TELECOM EQUIPMENT REVENUE



FY 2011-12 (₹113,188 crore)



FY 2010-11 (₹114,133 crore)

### Segments

- Enterprise Equipment
- Carrier Equipment
- User Device

### Growth

- 8.89%
- 5.06%
- 0.33%



1. NOKIA, D Shivakumar | 2. SAMSUNG, Ranjit Yadav | 3. CISCO, Naresh Wadhwa | 4. WIPRO, Anil Jain | 5. HUAWEI, Cai Liqun | 6. NSN, Sandeep Girotra | 7. ERICSSON, Fredrik Jejdling | 8. TECH MAHINDRA, Raju Wadalkar | 9. TCS, N Sivasamban | 10. ALCATEL-LUCENT, Munish Sethi

## Top 10 Telecom Equipment Vendors



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Published by Pradeep Gupta on behalf of Cyber Media (India) Ltd. D-74,  
 Panchsheel Enclave, New Delhi – 110 017, and printed by him at Ratna Offset,  
 C-101, Okhla Industrial Area Phase-I, New Delhi – 110 020

**Subscription:** Foreign—US \$40 (SAARC Countries), US \$50 (Rest of the world)

**All Payments Favoring:** CYBER MEDIA (INDIA) LTD

**Distributors in India:** IBH Books & Magazines Dist. Pvt. Ltd, Mumbai.

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**Corporate Website:** www.cybermedia.co.in  
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OVERALL ANALYSIS

# History Repeats Itself

The Indian telecommunications industry in FY12 had nothing much to cheer about having burnt its fingers with 3G and the only bright spot being 4G emerging in the scene as a wiser opportunity

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**'Policy Is Right, But How Spectrum Can Be Allocated Should Be Addressed'**  
 —Dr Hamadoun Touré  
 secretary general, ITU

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Slow pick up of 3G and lack of 4G ecosystem led to the downfall

### 86 OSS/BSS On Its Toes

The industry is being shaped significantly by service quality and availability, customer behavior, ease-of-use of services, and social media



### 64 MANAGED SERVICES Moving in Full Swing

Multi-vendor and multi-technology complexities are forcing the operators to move towards managed services

### 68 TRANSMISSION Sliding Down

Slow adoption of 3G and moderate growth in 2G coupled with political uncertainties resulted in the downfall

### 70 TEST & MEASUREMENT Smooth Sailing

Rising domestic demands and new technologies are contributing to the growth of the test and measurement industry



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An infrastructure rollout is needed to create a conducive environment for the growth of telecom turnkey

### 82 TELECOM TOWERS Failing to Rise

3G's failure has brought down the much promising tower segment to its knees

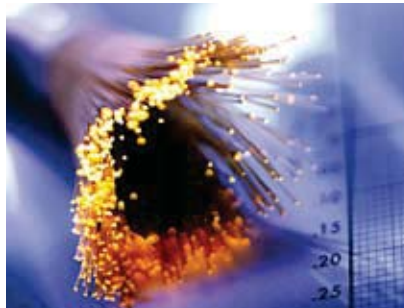


### 60 WIRELINE BROADBAND Sideline by Wireless



Wireless and wireline broadband should play 'cooperative' games rather than 'competitive' in providing broadband in the country

### 88 TELECOM CABLES Back In Gear



Dealing with huge crisis for some time, telecom cable manufacturers are riding high as FY12 brings in promises of growth

### 90 POWER MANAGEMENT Craving for Power



Being an indispensable part of the telecom infrastructure, power management needs a timely boost from the industry

### 93 TELECOM SOFTWARE Marching Ahead

The industry has gained with the CSPs investing heavily in embedded software, mobile communications, support systems, and network management



## ENTERPRISE EQUIPMENT

### 122 NETWORK INTEGRATION In Turbulent Times



The slowdown in major verticals like telecom and govt. took a toll

### 96 ROUTERS Treading Cautiously



For data transfer, wireless has always been the preferred medium, hence the focus on routers

### 98 SWITCH Standstill!



The market grew dynamically though it failed to translate into revenues

### 100 VOICE SOLUTIONS On an Upswing

The industry reports growth due to cloud adoption, open standards, IP Telephony, UC and mobility rich platforms





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**Up...Up and Higher!**



Thanks to mass adoption of smart mobile devices and BYOD, the wireless LAN industry is on cloud 9

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**Gain, with Pain!**



The market for structured cabling is tricky, with a lot of potential but enough roadblocks too

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**The New Real**



The rise in enterprise mobility, penetration of smart devices, and proliferation of 3G has presented a new dimension for AV conferencing

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Security threats are evolving parallelly with the onset of newer and advanced technologies—a heads-up for the security market

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The rising demand for portable devices has pushed the wireless equipment business way ahead of its wired counterparts

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**Fun with Funbook**



FY12 saw many handset companies shut shop, the Big Five ruled the Indian market

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**Not OK!**



For consumers cheap price is okay but cheap user experience is not, and that's what the Wishtel Ira is all about

**USER DEVICE**

**132**  
**HANDSETS**  
**The Vanishing Act**



FY12 saw many handset companies shut shop, the Big Five ruled the Indian market

**136**  
**FIXED PHONES**  
**More Gloomy Days Ahead**



Though it is very difficult for this segment to regain its lost growth, it would not be annihilated either

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**DATA CARD**  
**Long Live the Card!**



As convenience and consumption become key, there is a substantial increase in the number of subscribers opting for data cards

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**Biggies Remain Biggies**  
The industry reports growth due to cloud adoption, open standards, IP Telephony, UC and mobility rich platforms



**INTERVIEW**

## 'We plan to conduct phone compatibility tests with each of our headsets before launch'



**Ann Goh**

head of sales, South Asia Region, GN Netcom

### Which new areas have you tapped for India?

We are moving our focus towards lifestyle consumers. Hence we have upgraded even our entry-level platform products to have multimedia streaming and HD voice capabilities, offering more value for the customers.

Secondly, we have also taken a step forward with colors. Noting that consumers today want to match devices with their style and color choices, we have launched 4 new colors for Jabra Clipper. They are tangerine tango, new pink, turquoise, and white.

### How has been 2011 for Jabra?

2011 has been a good year for the company. We have achieved #1 position in Europe and also #1 cross brand in China, based on GFK data.

### What are the new products in the pipeline?

Being the global leader in headsets (Jabra owns 20% market share of headsets globally), we are constantly pushing our R&D specialists for innovation. We are

going to have a key product launch by the end of this year to set the platform for 2013, so I will have to keep you in suspense first! But stay tuned to Jabra, we will have more exciting products for the consumers.

### What are the new demands of your customers?

Consumers today want devices that can do everything for them. Hence the upgrade of our mono platform (except BT2045) is necessary so that even for early adopters of bluetooth headset buyers, they can use their voice apps with the same headset.

Second is with the personalization trend. More and more consumers want to personalize their headset and match them with their phones, clothes, or style. Hence we are launching Clipper colors to understand how the market responds to this variation. Subsequently, you can expect Jabra to be launching more colors which are in line with the latest color trends.

### What is the size of your retail presence in India and how do you plan to strengthen it further?

We are present in all the tier-1 and -2 cities. We are now planning to expand deeper into these cities. We have just launched some schemes for RDs and retail channels.

### Bluetooth technology many times faces interoperability issues. How do you handle this?

We have a lot of expertise in handling interoperability issues. As a third party cross brand with 10 years of experience in this field, we will conduct phone compatibility tests with each of our headsets before the launch.

**Ritu Singh**

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### Nokia and Carl Zeiss Extend Partnership

Nokia has extended its 7-year partnership with Carl Zeiss, a German manufacturer of optical systems. This partnership has led to manufacturing of camera smartphones such as Nokia N8 and Nokia 808 PureView. Nokia has also announced that Nokia 808 PureView would be launched in May 2012 in India, Russia, and in other select markets. Nokia 808 PureView features PureView technology to represent imaging technology, sensors, Carl Zeiss optics, and Nokia developed imaging algorithms. It also features Dolby headphone technology, HD 1080p video recording and playback with 4X zoom.

### Aricent and Mindspeed Launch LTE eNodeB Framework

The Aricent group and Mindspeed announced the launch of a joint LTE eNodeB reference framework. This framework includes solution design, from RF interface through S1 and X2 interfaces and includes Aricent base station software stacks integrated with Mindspeed baseband and silicon. The base station solution is designed to help telecom equipment manufacturers (TEMs) deliver high-performance base stations in multiple form factors, including femto, pico, metro and micro-cell configurations and is available for both LTE FDD and TD-LTE variants.

### DragonWave and NSN Amend Divestment Agreement

DragonWave and Nokia Siemens Networks (NSN) have chosen to amend divestment agreement for DragonWave's acquisition of NSNs' microwave transport business. As part of the amended agreement the planned closing date is June 1, 2012, subject to closing conditions, said NSN. DragonWave would be a strategic supplier of packet microwave and other related products to Nokia Siemens Networks. The 2 companies would jointly coordinate on technology development activities.