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# VoWLANS

in the  
Enterprise,  
Public Access and  
Residential Markets  
and the Emergence of the 4M Devices  
Released April 2004 Updated November 2004  
2004 - Third Annual Edition

## SUMMARY to the April 2004 Edition

The November 2003 edition of this report focused on the issue of the emergence of the convergent (4M) devices, which the first TeleAnalytics Report on Public Access VoWLANS in June 2002 had identified as one of the key enablers for VoWLAN. The November edition therefore focused more on devices than the far-reaching effects of VoWLAN in the Telecoms Industry as a whole.

This focus was rather necessary since the early VoWLANS visions of mid 2002 on the heels of the Public Access WLANs explosion, had been quite delayed due to uncertainties and soul searching on investing behind the development of 4M devices. With most of the research for the November 2003 edition done in the summer of that year, there was still quite some doubts on if the timelines were to be kept this time.

The timeline that was drawn in the November edition and was based on a significant amount of research correlating vendor's announcements with realities of design was mostly accurate; devices stopped being prototypes only. In the same period the thinking of the operator's adjusted to the inevitable realities (not necessarily undesirable) and quite a significant number of major operators created VoWLAN departments. These departments currently operate under "need to know" rules and they are matched in that respect by most traditional and not vendors of either handsets or silicon for handsets. The second round of VoWLAN handsets is going to hit the markets at the latest before Q4.

A new edition therefore became necessary, since now it is becoming evident to most that the "game" is not for 1,000,000 handsets some time in the next 3-4 years. Given the money spend and/or committed behind VoWLAN technology (in the few hundreds of millions range) VoWLAN would have its day in court the way all disruptive phenomena of such magnitude do. Disruptive phenomena of this nature, no matters to where they going to finally converge to, seldom burn "like candles"; Big Bangs are part of their trajectory.

This edition while starts with the issues of devices and the short-term inroads that VoWLANS is making in the enterprise market, also paints the medium term picture of a much bigger market the consumer one. Nothing about the creation of this market is going to be automatic and the warfare that is going to ensue will take years to drive to a new equilibrium point that transverses the boundaries of wireline and wireless. Many lightweights are moving into the market already, but only few major entries can be expected for this year, and even then they would be of the reconnaissance type. The actual battles would start in earnest in 2005, and along with the rising tide of consumer VoIP they would tax among others the limits of the regulatory systems around the world.

This edition expands on the point of view that VoWLANS is the manifestation that WLANs at a minimum are *wireless private convergent broadband premises networks*, and they have to be interfaced from the technology to the business planes, with the same seriousness that their wireline cousins take for granted. Of course the fact that they are not always private, and they came to the point that sometimes cover few tens of square kilometers is also analyzed.

Finally as explained in some more detail later in this brochure, this edition includes the results of a much more comprehensive forecasting model that allows for much higher resolution understanding of what "VoWLAN users" are, and what and how many VoWLAN devices they may use during the successive stages of the unavoidable lengthy realignment.