

Survey Methodology

Heavy Reading's 2003 Telecom Equipment Market Perception Study was conducted in two stages. In the first stage, a list of product categories and vendors was developed using a report entitled "Who Makes What" on the *Light Reading* Website, published on June 25, 2003. The initial version of the report included a preliminary set of categories with lists of vendors and invited readers to propose revisions to the categories and lists. The project was then publicized via email broadcasts to *Light Reading* readers. In all, about 300 proposed revisions were received, in the form of emails and postings on *Light Reading*'s message board. Based on these submissions, changes were made to the product categories, with some new categories being added and some definitions being modified. A significant number of vendors also were added to the lists.

In the second stage of the study, an online questionnaire was developed based on the product categories and vendor lists from the refined "Who Makes What" report. Potential survey respondents were then solicited via email to participate in the study. Only responses from participants employed by service providers were included in the final results.

Heavy Reading solicited participation from potential respondents via email invitations targeted specifically to service provider mailing lists. Email invitations were sent on August 19, 2003; August 21, 2003; August 26, 2003; September 2, 2003; and September 3, 2003. As an incentive, participants were enrolled in a contest to win a \$1,000 gift certificate.

The questionnaire was constructed so that respondents answered market perception questions involving only those product categories with which they claimed to be familiar. Survey participants rated vendors in each product category according to five criteria:

- Name recognition
- Price leadership
- Performance leadership
- Market leadership in product quality and reliability
- Market leadership in service and support

In addition, participants were invited to submit "write-in" comments on other vendors they perceived as being in that specific market segment, as well as on the key problems they perceive in each product category. Finally, all participants were invited to submit anecdotes illustrating service and support problems with equipment vendors.

SURVEY RESPONDENTS

More than 980 responses were received for the study. All responses coming from those who said they did not work for a service provider were eliminated from the survey database.

The final base of 770 survey participants represents employees from more than 300 different service providers worldwide.

The numbers of respondents who participated in the specific product category surveys are as follows:

Figure 1.7: Respondents by Product Categories

Product Category	# of Respondents
Sonet Multiservice Provisioning Platforms	212
SDH Multiservice Provisioning Platforms	179
Metro Ethernet Equipment	169
Metro Ethernet Equipment (Incl. Packet Ring)	135
Ethernet Access Equipment	195
10-Gbit/S Ethernet Switches	138
Core Routers	212
Multiservice Switches	145
Edge Routers	183
Broadband Remote Access Servers (B-RASs)	85
DSL Access Multiplexers (DSLAMs)	166
Cable/MSO Equipment	51

Third-Generation Digital Loop Carriers (DLCs)	56
Access/Metro DWDM Systems	128
Terrestrial Long-Haul DWDM Systems	121
Submarine Long-Haul DWDM Systems	86
Optical Switches	120
Softswitching/VOIP Equipment	124
Content Switching/Load Balancing	82
Traffic Management Devices	49
Session Controllers	38
Route Optimization Devices	46
Test Equipment	155
Fiber Access Equipment	98
Free Space Optics	53
Broadband Home Gateways	73
Integrated Access Devices (IADs)	67
Video-Over-IP Equipment	84