

WIRELESS IMPACT ON THE STRUCTURED CABLING SYSTEMS MARKET

What do recent wireless developments mean to the structured cabling systems (SCS) suppliers?

- Will there be a wholesale change out to wireless networks?
- Will only certain segments of the SCS market be impacted by wireless?
- What about the sunken investment in the current cabled SCS network?
- How will new smart phones and tablets, especially the Apple iPad be used in current networks?
- Will new networks opt for a wireless network?

All of these issues are addressed in our new study on the impact of wireless on the SCS market.

There are critical concerns for all of the SCS suppliers.

A detailed impact analysis in the new study includes analysis over three time periods:

- Near term: next two years
- Midterm: three to five years
- Far term: beyond five years

Five-year product forecasts are provided for:

- 1) UTP Cables and apparatus by category
- 2) Fiber cables by MM—SM & LOM (laser optimized multimode)
- 3) Fiber apparatus by MM—SM
- 4) Separate Fiber cable and apparatus forecasts for data centers

New technologies analyzed include:

- 400/1000 Gbps
- Future high-speed WLANs
- Apple's Thunderbolt high-speed interface
- Passive Optical Networks (PONs)
- Active Optical Cables (AOC)

Over.....

TABLE OF CONTENTS

Chapter 1

Introduction

Wireless Situation SCS Market Implications
Study Objectives
Methodology/Sources
General Notes

Chapter 2

Executive Summary

Current Wireless Situation
Wireless impact on SCS Market
SCS Market Forecast
SCS Total Market Yearly Growths

Chapter 3

Wireless Situation Analysis

Wireless Evolution
Apple iPad – A Game Changer

Chapter 4

WI-FI

WI-FI an Established Standard
IEEE 802.11 WI-FI Standards
WI-FI Future Trends

Chapter 5

WLANs

WLANs Evolve
WLAN Architecture
WLAN Cabling Standards
WLANs Pro/Cons
WLAN Future Trends

Chapter 6

SCS Product/Technology Trends

OM4 Fiber Cables
Higher Speed Beyond 10 Gbps UTP Cables
Cat 7/Cat 7a STP Cables
40/100 Gbps Over UTP Cables
400/1000 Gbps Ethernet
Energy Efficient Ethernet
Power Over Ethernet

Chapter 7

Future Technology Developments

Thunderbolt
Passive Optical Networks (PONs)
Active Optical Cables

Chapter 8

Wireless Impact Analysis

Overview
Near Term Impact Analysis
Mid Term Impact Analysis
Far Term Impact Analysis

Chapter 9

Total SCS Market Forecast

Total SCS Market Forecast
Fiber-Copper SCS Segment Forecast
Cable-Apparatus SCS Segment Forecast

Chapter 10

Copper Cable Forecast

Total Copper Cable Volume Forecast
Total Copper Cable Market Forecast
Copper Cable Volume Forecast by Cable Types
Copper Cable Market Forecast by Cable Types
Total Copper Cable Volume Forecast by Plenum – Non-Plenum

UTP Copper Cable Volume Forecast by Categories

UTP Copper Cable Market Forecast by Categories

Chapter 11

Fiber Cable Forecast

Total Fiber Cable Forecast
Fiber Cable Volume Forecast
Fiber Cable Market Forecast by MM-SM
Fiber Cable Volume Forecast by MM-SM
Multimode Fiber Cable by LOM-Other Volume Forecast
Data Center Fiber Cable by Types Forecast

Chapter 12

Copper Apparatus Forecast

Total Copper Apparatus Forecast
Patch Panel Volume Forecast by Categories
Patch Panel Market Forecast by Categories
Outlet Volume Forecast by Categories
Outlet Market Forecast by Categories
Connector Volume Forecast by Categories
Connector Market Forecast by Categories

Chapter 13

Fiber Apparatus Forecast

Total Fiber Apparatus Forecast
Fiber Interconnect Volume Forecast by MM-SM
Fiber Interconnect Market Forecast by MM-SM
Fiber Outlet Volume Forecast by MM-SM
Fiber Outlet Market Forecast by MM-SM
Fiber Connector Volume Forecast by MM-SM
Fiber Connector Market Forecast by MM-SM
Data Center Apparatus Volume Forecast by Product Types
Data Center Fiber Apparatus Market Forecast by Product Types

LIST OF FIGURES

Chapter 2

Figure 2.1: Total SCS Market Forecast
Figure 2.2: Total SCS Market Year-to-Year Growth

Chapter 4

Figure 4.1: 802.11 Network Standards
Figure 4.2: New Wireless Technologies

Chapter 5

Figure 5.1: WLAN Centralized Architecture

Chapter 6

Figure 6.1: Multimode Fiber Types Performance Grades
Figure 6.2: Multimode Fiber Link Distances Support
Figure 6.3: High Speed Ethernet UTP Cable – Differing Support Schemes

Chapter 9

Figure 9.1: Total SCS Market Forecast
Figure 9.2: Total SCS Market Year-to-Year Growths
Figure 9.3: Fiber vs. Copper Cabling Forecast
Figure 9.4: Fiber vs. Copper Cabling Trends
Figure 9.5: Cable vs. Apparatus Forecast

Chapter 10

Figure 10.1: Copper Cable Volume Forecast
Figure 10.2: Total Copper Volume Year-to-Year Growths
Figure 10.3: Total Copper Cable Market Forecast
Figure 10.4: Copper Cable Volume Forecast by Type

Figure 10.5: Copper Cable Market Forecast by Type
Figure 10.6: Total Copper Cable plenum-Non-Plenum Volume Forecast
Figure 10.7: Copper Cable Plenum – Non-Plenum Trends
Figure 10.8: UTP Copper Cable Volume Forecast by Categories
Figure 10.9: UTP Copper Cable by Category Trends
Figure 10.10: Copper Cable Market Forecasts by Categories

Chapter 11

Figure 11.1: Total Fiber Cable Market Forecast
Figure 11.2: Total Fiber Cable Market Year-to-Year Growth
Figure 11.3: Fiber Cable Volume Forecast
Figure 11.4: Total Fiber Cable Market Forecast by MM-SM
Figure 11.5: Total Fiber Cable Volume Forecast by MM-SM
Figure 11.6: MM Fiber Cable Forecast by LOM - Other
Figure 11.7: Total Fiber Cable Volume Forecast by LOM –Other
Figure 11.8: Data Center Fiber Cable Volume Forecast
Figure 11.9: Data Center Fiber Cable Market Forecast

Chapter 12

Figure 12.1: Total Copper Apparatus Market Forecast
Figure 12.2: Total Copper Apparatus Market Year-to-Year Growths

Figure 12.3: Patch Panel Volume Forecast by Categories
Figure 12.4: Patch Panel Volume Trends by Category
Figure 12.5: Patch Panel Market Forecast by Categories
Figure 12.6: Outlet Volume Forecast by Categories
Figure 12.7: Outlet Market Forecast by Categories
Figure 12.8: Connector Volume Forecast by Categories
Figure 12.9: Connector Market Forecast by Category

Chapter 13

Figure 13.1: Total Fiber Apparatus Market Forecast
Figure 13.2: Total Fiber Apparatus Market Year-to-year Growths
Figure 13.3: Fiber Interconnect Volume Forecast by MM-SM
Figure 13.4: Fiber Interconnect Market Forecast by MM-SM
Figure 13.5: Fiber Outlet Volume Forecast by MM-SM
Figure 13.6: Fiber Outlet Market Forecast by MM-SM
Figure 13.7: Fiber Connector Volume Forecast by MM-SM
Figure 13.8: Fiber Connector Market Forecast by MM-SM
Figure 13.9: Data Center Fiber Apparatus Volume Forecast
Figure 13.10: Data Center Fiber Apparatus Market Forecast