WiMAX
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# Mobile WiMAX Infrastructure Vendor Ratings: Global Service Provider Survey

January 27, 2010

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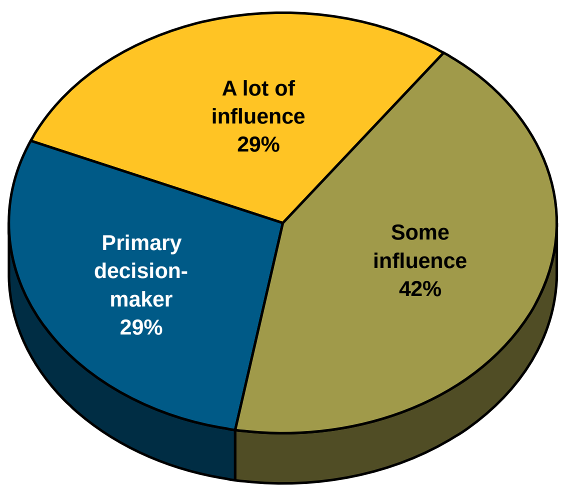
## METHODOLOGY

We interviewed 21 service providers in December 2009 and January 2010, using online, telephone and in-person surveys. To qualify, respondents must own and operate a mobile WiMAX network now or plan to by 2012. By our definition, mobile WiMAX is categorized as IEEE 802.16e equipment and devices.

### *58% of respondents have strong purchase influence*

Respondents must have detailed knowledge of the equipment used by their organizations to deliver mobile WiMAX network services. They also must have at least some influence in the purchase decision. The majority of respondents (58%) are the primary WiMAX equipment purchase decision-maker or have a lot of influence in purchase decisions. All respondents have some influence. This is a key part of the screening process; it ensures that we're talking to knowledgeable decision-makers in the buying process. Our survey respondents are key personnel in deciding which vendor's equipment will form the basis of their mobile WiMAX network, so their perception carries a lot of weight.

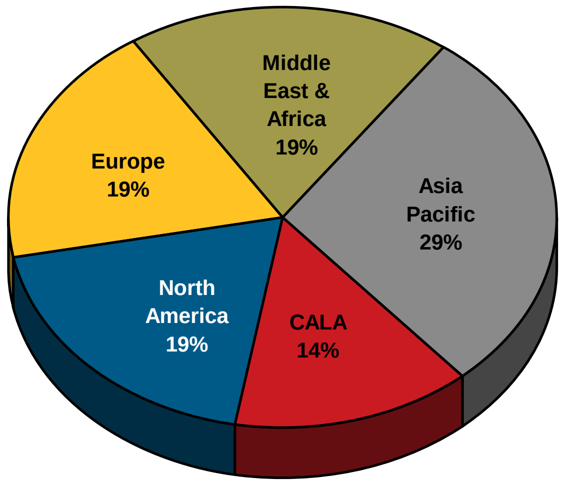
**Exhibit 1** **Respondents Have Strong Purchase Influence**
**n=21**



## *Respondents are fairly evenly distributed across regions*

We deliberately tried to survey operators from all regions as equally as possible, and the regional distribution of respondents is shown in the chart below. In general, this gives an indication of the global spread of WiMAX as a technology, though the higher proportion of respondents from the APAC region is not surprising, given the particular intensity of activity in that region.

**Exhibit 2** **Regional Distribution of Respondents**
**n=21**



## *We have a balanced mix of service provider types*

Of the 21 respondents, 24% are WiMAX-only operators, 19% are fixed-line incumbents (some being vertically integrated operators operating both wireline and wireless businesses), 29% competitive fixed-line providers, and 29% mobile operators. The large percentage that are WiMAX-only operators are a characteristic of the WiMAX market, which has numerous, often smaller greenfield ISPs being formed specifically to take advantage of the WiMAX opportunity.

There has been increased activity from fixed-line and mobile operators too, particularly in developing markets, where WiMAX is seen as an effective addition to its existing infrastructure to deliver broadband services. For competitive operators, WiMAX is a strong opportunity to move into the wireless and/or broadband markets and compete with differentiated offerings against fixed incumbents and mobile operators.

**Exhibit 3** **Respondent Service Provider Types**
**n=21**