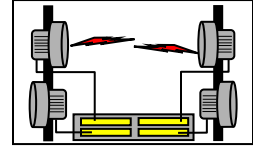


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9th Edition

Global Digital PTP Radio Market Analysis and Forecast, 2013-2017

May 2013



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EXECUTIVE SUMMARY

The global digital point to point microwave/millimeter wave radio market (**digital point to point (PTP) radio market**) continues to be dependent on the fortunes of the mobile base station infrastructure market as demand in 2012 weakened across all application segments except enterprise/private networks. Greece and its sovereign debt situation overshadowed the global markets including the telecom sector, essentially paralyzing wireless equipment demand in Europe for much of Q2 and Q3. Even with continued deployments of new LTE networks, the market was unable to make progress against such strong economic headwinds.

Many PTP radio industry reports attempt to quantify the overall market in terms of monetary value. While analyzing the total economic impact of the global digital point to point millimeter wave radio market is important, the estimated unit shipments by each OEM remains the focus of this report. Although this report focuses only on licensed digital millimeter wave radio shipments from <5 GHz up to E-Band frequencies, the unlicensed bands of 24 and 60 GHz are also included as part of the continuing analysis on the market potential for Gigabit radio technology. The report currently does not focus on or discuss market issues related to the 2.4 GHz and 5.8 GHz unlicensed bands.

How well did we do in our forecast from a year ago? Our goal is to be within +/-10% of our forecasts.

The good:

- 🔴 We were correct in our all indoor trunk radio forecast with a variance of -4.2%
- 🔴 We were correct in our hybrid high capacity 50-900Mb radio forecast with a variance of +7.5%
- 🔴 We were correct in our 1Gbps high capacity radio forecast with a variance of -3.6%

The not so good:

- 🔴 We were off by +13.6% for the total overall radio forecast
- 🔴 We were off by +43.5 for the total 50-900Mb Ethernet radio forecast
- 🔴 We were way off by +157% on our 60-80GHz radio forecast

A negative % variance means our forecast was higher than actual shipments while a positive % variance means our forecast was lower than actual shipments.

Overall, if we had to give ourselves an assessment, we believe we got a "B" rating by being within 15% of the overall forecast as opposed to our target of <10%.

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