

Understanding the Digital World

Cloud & Infrastructure



Telco CDN

Will mobile and non-video traffic secure the future?

M14131IN1 – April 2014

- This report is part of our "Cloud & Infrastructure" series which in 2014 includes:
 - One Excel database, updated annually
 - One report in PowerPoint, updated annually
 - Four reports in Word, including a summary in PowerPoint
 - Preferred access to our infrastructure experts

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About IDATE and the DigiWorld Institute



IDATE's teams of specialists have earned us a global reputation for reliable tracking and analysis of telecom, internet and media markets since 1977.

Now, with the support of our members, which include over 40 of the digital economy's most influential players, the newly rebranded DigiWorld Institute has entered a new era, focusing our development around three main areas of activity:

- **IDATE Research**, a catalogue of publications
- **IDATE Consulting**, bespoke analysis and consulting solutions
- **DigiWorld Institute**, a digital economy think tank.



For more information about our reports

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List of companies examined

Telecom operators

AT&T

BT

Comcast

Deutsche Telekom

KDDI

KPN

Orange

Telecom Italia

Telefónica

Verizon

Equipment manufacturers, telco CDN solution providers

Akamai

Alcatel-Lucent

Cisco

CDNetworks

EdgeCast

Ericsson

Limelight

Jet-Stream

Juniper

Saguna Networks

Verivue

2. Methodology & definitions

2.1. IDATE's general methodology

The approach adopted by the IDATE team of analysts and consultants is based on the combination of several methods:

- Field research and validation of field research data;
- Conventional tools used in industry and market analysis: segmentation, competition analysis, strategic strengths, modelling and assessment and forecasts, amongst others;
- Expert analysis of field specialists and their professional network partners.

More specifically, IDATE avails of the following human resources and tools:

1/ A multidisciplinary team of full-time consultants, specialised by business sector

IDATE analyses are performed primarily by our in-house consultants, and very occasionally by freelance market analysts. This approach capitalises on our pool of expertise through teamwork, and the constant sharing of knowledge, ideas, contacts, viewpoints and key data. Each report is drafted by a team of specialists under the direct supervision of senior consultants who are recognised experts in their field.

2/ Primary and secondary research

IDATE reports and databases are based on primary data obtained from first-hand interviews with the sector's decision makers and on secondary data assembled from public sources and external databases.

3/ An integrated information centre sustained by a number of tools and proprietary databases

Over the course of 30 years, IDATE has developed proprietary work methods, data structures and databases that trace the history of major developments in the sectors under study.

- **Companies:** The IDATE in-house data service tracks the latest news and events concerning the leading telecom, Internet and media industry companies around the globe. Innovative firms and start-ups are monitored by the market experts in the different 'Practices'.
- **Markets:** IDATE databases are developed using rigorous methods to process major economic indicators (GDP, investment, exchange rates and demographics) and relate them to influential sectoral and national factors such as CAPEX and national market dynamics).
- **Technologies:** IDATE has a practice-based organisation structure which enables us to track innovation efficiently. IDATE engineers ensure an in-depth understanding of the changing shapes of products and services and of the latest innovations in the marketplace.

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4/ Contents of published reports

Each IDATE market report details the structures and issues at play in the market under study, the driving forces (technologies, regulation, and consumption) and the players involved. Particular emphasis is placed on market assessments and forecasts, which are developed within the framework of a core scenario. Every market report features a clear and concise presentation illustrated with tables and graphs of key market data and trends.

The drafting process of a market report is based on the following steps:

- analysis of the information available in the in-house databases, and review of analyses performed in the recent past;
- based on a preliminary segmentation and assessment of the market, and as part of an validated interview guide, analysts conduct interviews that enable them to validate working hypotheses;
- a market model is then developed, to enable testing of the hypotheses which impact market development, and the model is validated after a new round of interviews;
- and, finally, report conclusions are debated within the team responsible for the project and with expert consultants from the various fields involved;
- proofreading and editing/revision processes, prior to the editing of the final version of the report which is delivered to the client.

2.2. Methodology specific to this report

This report was produced by drawing on:

- IDATE's CDN expertise, acquired through a series of assignments conducted over the past five years in France and around the world, and through our participation in Europe's FP7 OCEAN (www.ict-ocean.eu) project which ran from 2010 to 2013;
- some 20 interviews with equipment manufacturers, CDN suppliers and operators, service providers and telcos deploying CDN;
- participation in trade conferences (CDN World Summit, CDN Asia Summit, CDN Summit, Mobile Video Optimization) and in the Mobile World Congress.