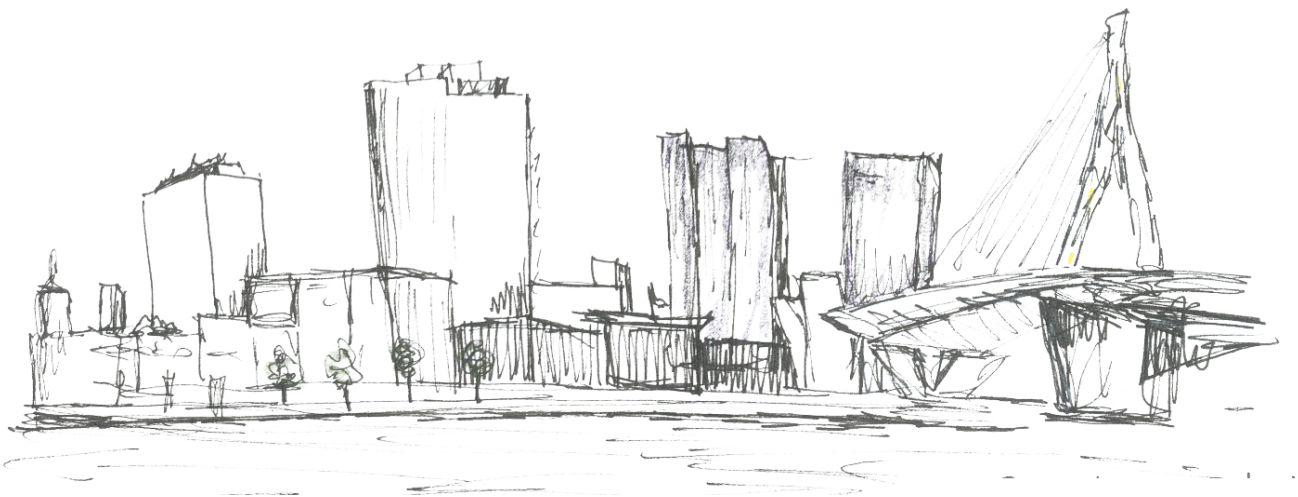


MUNICIPAL COMMUNICATION SYSTEMS



MARKET, MOTIVES & TRENDS,
TECHNOLOGICAL REASON
& VENDOR ACTIVITY

TABLE OF CONTENTS

Introduction.....	1
Bottom Lines.....	3
Market & Trends.....	4
Global Broadband Demand.....	6
Municipal Broadband Trends.....	9
Motives.....	13
Benefits for the Authority.....	15
Benefits for the Residents.....	17
Hurdles and Tips.....	18
WiFi Failure Sparks FTTH Interest.....	20
Business Models.....	22
Local Government Focus: Amsterdam.....	23
Local Government Focus: Lafayette.....	24
Workflow.....	25
Scope of Applications.....	28
Municipal Uses.....	29
Consumer Uses.....	33
Other Organizational Uses.....	35
Vendors and Integrators.....	37
Competitor Solutions.....	41
Cisco.....	41
Alcatel-Lucent.....	42
Motorola.....	44
Nortel.....	46
BelAir Networks.....	47
Google.....	48
Case Study – Portland, Oregon.....	49
Conferences and Exhibits.....	52
Professional Publications.....	55

INTRODUCTION

Local governments, mostly in US, Western Europe and the developed bubbles of APAC have been taking initiatives to introduce independent city-wide communication networks for their own use, and to benefit their residents.

Some of these projects encountered serious hurdles, and some even cancelled, mainly due to lack of proper planning or mismatch between the city's targets and the technological and financial feasibility in a commercial environment.

Fast technology advancement has a deep impact on city-wide networks, as WiFi or Wireless mesh networks could become outdated with the introduction of WiMAX. Fixed-line infrastructure deployment wasn't popular or considered financially worthwhile, until growing broadband requirements sparked FTTP initiatives, taken by municipalities wishing to offer quality infrastructure and enjoy the benefits it offers.

Could WiMAX be the answer for the future Ubiquitous city's needs? Or extension of fiber infrastructure with added Fiber-to-the-Premises connectivity? This is also a question of time with WiMAX end-devices just starting to appear.

There is no right answer; it all comes down to public and municipal needs, budget allocations, existing infrastructure and proper integration of all considerations into one viable and profitable solution.

In this report we will observe the business and technology landscape in view of present and future municipality communication infrastructure projects, with market insights and financial information. We will also take a glimpse at several case studies in sight of their business models and the way they tried to adapt a solution to their needs.

BOTTOM LINES



Huge growth and high interest in services is projected by analysts



In-depth Planning is the key to successfully match network to requirements



Proper **consulting and integration** bridge the gap between a city's lack of technological knowledge and the vendors attempt to sell their technology



Different business models fit various municipal requirements. No two cases are the same, but learning from neighbor experience is vital for success



Highest survivability for commercially feasible **Multifunction networks**



High capacity inter-city backbone could boost market competitiveness and **draw revenues** from ISPs and carriers as well as end-users



Broadband today is being considered what electricity was a century ago, a vital vein bringing development and high life standard



Muni Wi-Fi failed and WiMAX is immature. **In this window of opportunity FTTP is bound to rise**, and solve the bandwidth hunger, before a wireless method will be widespread enough to save costs