In 2013, 4G or long term evolution (LTE) network roll-outs drove continued rapid growth in mobile data traffic. Access networks evolved to accommodate the growth, employing small cells and Wi-Fi offloading, which led to new mobility testing needs. In addition, the industry witnessed intense competition amongst multiple players for the provision of next-generation services, including 100G Ethernet technology. The broadband segment, thus, played a role in increased infrastructure spending, including test and measurement (T&M), by service providers.

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Anritsu

In 2013, Anritsu witnessed a decline in demand in the Japanese market as a few domestic smartphone vendors exited the mobile device business. The Asian and North American markets, however, witnessed strong demand for the company's products owing to investments in LTE and LTE-Advanced systems.

Globally, the network infrastructure market was abuzz with 40 Gbps network construction, while research and development (R&D) activities pertaining to 100 Gbps network infrastructure were also being undertaken, owing to the rapid growth in data traffic. Apart from this, rise in smartphone penetration led to rapid data transmission demand, thus increasing base station and mobile backhaul construction. As a result of these factors, demand for the company's testing solutions grew in 2013.

Agilent (Keysight Technologies)

A separation in Agilent Technologies' business segments is currently underway, and this is likely to be concluded by November 2014. The new electronic measurement company, called Keysight Technologies, will focus on providing solutions to the communications sector. In 2013, Agilent's share of communications-related solutions in the electronic segment also declined

from 37 per cent in 2012 to 34 per cent in 2013. This was on account of unfavourable foreign currency movements. Apart from this, the company suffered from low wireless manufacturing demand caused by the loss of business from a large customer. As a result, its investment in wireless R&D also remained low. However, the future outlook for Agilent remains positive on account of the increasing demand for next-generation services.

JDSU

To specialise in the mobile broadband segment, JDSU acquired UK-based Arieso on March 7, 2013. Arieso is a provider of location-aware software solutions that enable mobile network operators to boost their 2G, 3G and 4G network performance. After this acquisition, the company received a significant order from Canada-based Manitoba Telecom Services to provide subscriber-centric network design, planning and optimisation solutions. Keeping pace with the growing industry demand for high speed data, JDSU is currently updating its solutions to support LTE-Advanced technology.

Spirent Communications

For Spirent Communications, 2013 was a challenging year. The communications market was rapidly shifting to 4G/LTE wireless technologies, which led to lower demand for 3G. As the company already has an established market share in 3G, this technological shift led to lower investments on its part as well as lower revenues. Region-wise demand for Spirent's solutions was weak in Europe, China and in some market segments in North America. To strengthen its position in the LTE market, in July 2014, the firm agreed to buy the assets of Radvision's Technology Business Unit for $25 million, to add to its existing video and voice over LTE testing portfolio.

EXFO

Over the years, EXFO has expanded its product portfolio into servicing for next-generation IP networks, and test equipment for 2G, 3G and 4G/LTE wireless networks. Its service assurance solution, called the Brix System, is a probe-based hardware and software solution that delivers real-time IP service monitoring and verification of next-generation IP networks. Built around a distributed architecture, the Brix System enables the successful launch and ongoing profitable

operation of IP-based voice, video and data applications and services. Towards the end of 2013, EXFO introduced several products supporting 4G/LTE and 100G technologies, which significantly boosted its revenues.

Danaher

In 2013, Danaher witnessed several market opportunities as well as challenges pertaining to the rapid technological development in computing, mobile connectivity, communications and digitisation. At present, it is making significant investments through acquisitions, to address this rapid pace of technological change in its served markets. It is also looking to globalise its manufacturing and R&D resources to improve the efficiency of the company's operations.

Conclusion

Market leaders in the T&M telecom industry realise that LTE advancements and 100G level of technologies will remain the key demand drivers. Thus, a global trend can be seen where these players are trying to revamp their existing portfolio to support LTE. In fact, companies that witnessed low demand for their products owing to a decline in the demand for their established 3G infrastructure are now venturing into LTE segments through acquisitions. Going forward, this trend is expected to continue. While it will be a challenge for global players to adapt to this rapid technological shift, it will also be a significant growth driver for the industry.

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