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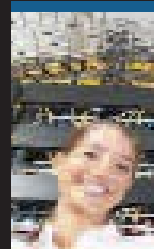
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3 RATIONALE

To make this 2005 TIA Annual Report available to PSOs, facilitating information sharing and coordination.

4 CONSEQUENCES AND IMPLICATIONS

5 ISSUES FOR DISCUSSION



ADVANCING GLOBAL COMMUNICATIONS



ADVANCING GLOBAL COMMUNICATIONS

2005 Annual Report

WHAT'S THE DIFFERENCE BETWEEN 2006 & 2007?

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powered by 

While TIA can't predict the future of the industry we serve, we can tell you that GLOBALCOMM will be back. Next year. In June. In Chicago. Who will have merged by then is anyone's guess. What new players will be on the global scene? Who will receive the coveted annual GLOBALCOMM Icon Award? Will it be the telcos or the cable guys who win over consumers with triple and quad play services? And what's the best way to secure your data in an increasingly wireless world?

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2005 Annual Report

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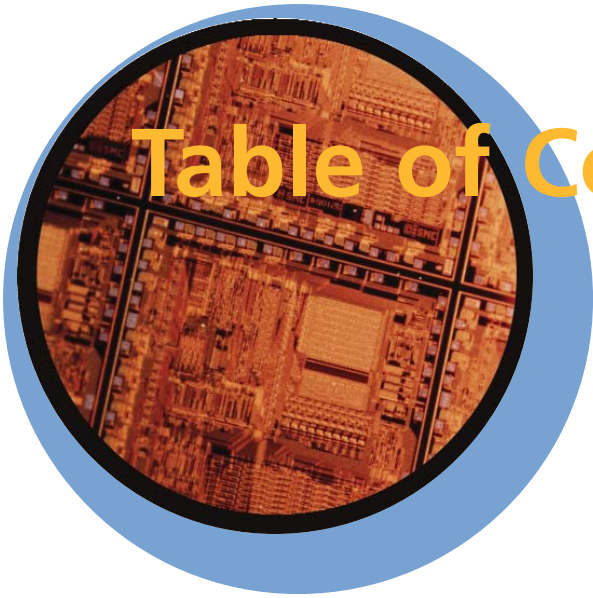


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Mission Statement

TIA is the leading trade organization for the information and communications technology (ICT) industry. As owner of GLOBALCOMM™, TIA provides essential and cost-effective resources to its 600+ member companies, global ICT suppliers and their service provider and enterprise customers. The association serves its members by facilitating collaborative global standards development, by advocating member-driven, United States and international regulatory and public policies (including broadband, VoIP, spectrum management and other critical issues) and by offering cost savings and preferred placement at GLOBALCOMM™ and other marketplace events. These activities equate to comprehensive and exclusive networking opportunities with customers, suppliers, peers, competitors and industry, policy and regulatory leaders, discounts on TIA standards and technical documents, and unmatched market intelligence for members' business development. Visit us at <http://www.tiaonline.org>.

GLOBALCOMM™ is a trademark of the Telecommunications Industry Association. The Next-Generation Communications Marketplace and Summit will take place June 4-8, 2006, at Chicago's McCormick Place. For more information, go to www.globalcomm2006.com.



Letter from the TIA Leadership

With the general economic climate improving and many of our trade association's companies on the upswing, TIA's programs are creating world-class technical standards, successfully advocating pro-competitive policies and generating viable sales leads. Of course, change remains constant, and mergers and acquisitions seem to be accelerating. In a highly competitive, globalizing industry such as ours, these changes are not unexpected. In any case, 2006 should be a more profitable year for our companies.

As we look back at 2005, we see an industry that has continued to be innovative, dynamic and growth-oriented. We are pleased to report the same assessment of this trade association, its services and its products — all of which benefit our 600+ members.

On the technical front, more than 1,100 industry volunteers worked in 70+ TIA domestic standards-formulating groups to develop more than 200 technical standards in 2005. The creation of the new Terrestrial Mobile Multimedia Multicast (TM3) Committee was a major initiative, and the committee is addressing standardization of critical aspects of the technologies driving the convergence of terrestrial broadcast and advanced mobile wireless multimedia services.

Standards emphasis last year continued on next-generation networks, wireless broadband, fiber optics, satellite and user premises equipment and was also focused on public safety interoperability, applications for first responders in the emergency communications and public safety field, and critical infrastructure/homeland security activities.

In addition, at the global level TIA represented the industry at technical meetings in Europe, Asia and North America, as well as continuing to serve as Secretariat to the Third-Generation Partnership Project 2 for the sixth consecutive year.

On the public policy front, TIA worked aggressively with representatives of member companies to develop, support and ensure the realization of policies that promote investment, innovation and global industry expansion. In particular, the association has been very focused on convergence of networks, technologies and services driven by IP; next-generation multi-platform broadband deployment; availability of spectrum for commercial and public safety advanced communications; removal of barriers for new entrants into the voice and video distribution markets; and ensuring that the U.S. communications sector continues to be a world leader in advanced research.

The Public Policy Committee has advocated to members of Congress regarding legislation to reshape the *Telecommunications Act of 1996*, while the International Committee continued to focus on market access and the encouragement of coherent and consistent regulations internationally to create a truly global marketplace. China and India have received particular attention because of the size of their markets. Meanwhile, TIA's new Communications Research Division has gained visibility in its efforts to ensure the United States' leadership in advanced communications research.

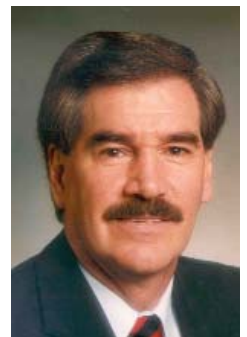
Last year, in addition to standards development and policy, the association's other key program continued to be the strong stimulation of sales-lead generation. The final SUPERCOMM® was the 18th annual trade show and conference in the highly successful series, and work is well under way for the launch of TIA's GLOBALCOMM™ 2006 at Chicago's McCormick Place, June 4-8. GLOBALCOMM™ replaces SUPERCOMM® as the association's premier event for the industry. Already, over 5000 exhibiting companies have confirmed their participation, and we expect 20,000 attendees from more than 100 countries.



E. Van Cullens

TIA Chairman

*President and CEO
Westell Technologies
Inc.*



Matthew J. Flanigan

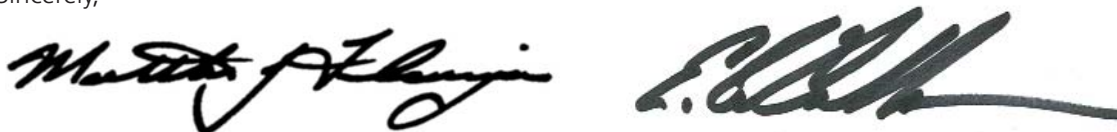
TIA President

Recognizing the importance of the Asia market, TIA presented SUPERCOMM® INDIA in New Delhi for the fourth consecutive year in February 2005 with a record attendance of more than 16,000 people, and GLOBALCOMM™ INDIA was successfully launched in early 2006. Likewise, the association continued to support the International Telecommunication Union's ITU TELECOM exhibitions around the world. Next on schedule is ITU TELECOM WORLD 2006 in Hong Kong, December 4-8. We urge you to attend and exhibit in our USA Pavilion to take advantage of the excellent floor traffic and interest in United States products and services.

Each January the association produces *TIA's Telecommunications Market Review and Forecast* to provide current data and projections for the next four years. The comprehensive 350-page report features more than 400 tables and charts, making it the best bargain for member companies seeking market research and development data.

We hope you will increase your participation in the association's activities, take part in the standards development process, advocate for the industry and for your company in public policy circles, and enjoy marketing opportunities at events like GLOBALCOMM™. Thank you for your company's past support and continued participation.

Sincerely,

Two handwritten signatures in black ink. The signature on the left is more cursive and appears to be 'M. J. Flynn'. The signature on the right is more stylized and appears to be 'P. C. ...'.

P.S. Don't miss the extensive free programming offered in the many TIA Summits at GLOBALCOMM™ in Chicago and note the special emphasis on the hottest regional markets.

SUPERCOMM® is a registered trademark of the Telecommunications Industry Association (TIA) and the United States Telecom Association (USTA). The final SUPERCOMM took place June 2005.

GLOBALCOMM™ is a trademark of the Telecommunications Industry Association (TIA).



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Vacant



Industry Report

U.S. Market*

Spending in the U.S. telecommunications industry totaled \$857 billion in 2005, rising 8.9 percent, led by double-digit increases in network equipment, wireless devices, wireless services, services in support of equipment, Internet access, unified communications, videoconferencing public room services and Web conferencing.

U.S. spending on telecommunications equipment and software totaled \$166 billion in 2005, a 5.4 percent increase from 2004. Revenue from network equipment and facilities rose 15.9 percent to \$20 billion in 2005. That increase followed a 13.3 percent rise in 2004 and was principally due to a rebound in fiber deployment. Wireless capital expenditures/Wi-Fi/WiMAX equipment revenue totaled \$29 billion in 2005. The enterprise market expanded 6.9 percent from 2004, reaching \$98 billion in 2005 — that gain exceeded the 6.6 percent advance in 2004 and was well in excess of the low single-digit gains in 2001–03. Improved growth in internetworking equipment, strong IP-PBX sales and double-digit gains in videoconferencing equipment and CTI systems and software buoyed enterprise equipment.

Spending on transport services in 2005 reached \$311 billion. Local exchange services revenues fell 1.8 percent in 2005 to \$118 billion. Long-distance service spending fell 0.7 percent, its fifth consecutive decrease, as the shift from wireline to wireless in long-distance traffic continued. Offsetting these declines was a 14.8 percent increase in wireless services to \$119 billion.

Internet access increased 10.2 percent in 2005 to \$28 billion. Broadband, the leading revenue stream since 2002, rose 20.8 percent to \$20 billion, while dial-up fell 9.6 percent to \$8 billion. Fierce competition between RBOCs and cable operators is driving down prices and increasing broadband speeds, accelerating the migration from dial-up to broadband.

Specialized services — unified communications, videoconferencing public room services, audioconferencing service bureau spending and Web conferencing — remain a small but rapidly growing segment of the industry. Spending in 2005 reached \$6 billion, up 13.8 percent over 2004.

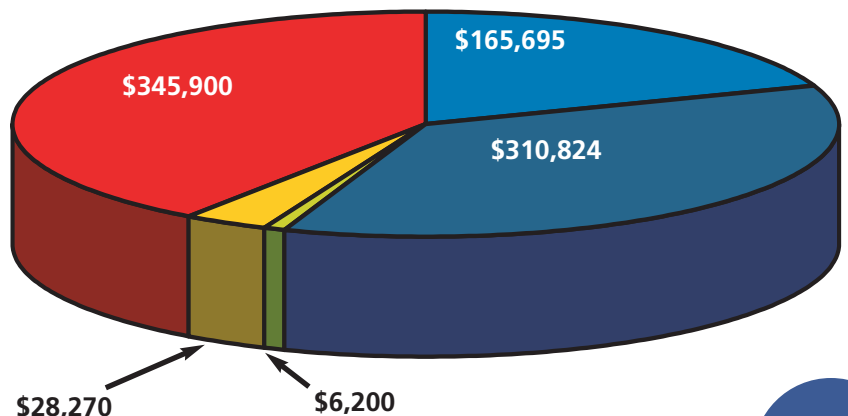
Spending on services in support of enterprise networks and customer premises equipment, wireline, cable and broadband networks, wireless networks and public wireless local area networks grew 15 percent to \$346 billion in 2005. Support services include maintenance and repair, logistical support, integration of products from different vendors, technical assistance for hardware and software operations, end-user training and information technology consulting.

The U.S. telecommunications market will grow at a projected 9.0 percent compound annual rate from 2006 to 09, reaching \$1 trillion in 2009.

The 2005 U.S. Telecommunications Market (\$ Millions)

Total: \$784,501 (7.9% increase)

Category	Increase over 2004 (%)
Equipment & Software	5.4
Transport Services	4.2
Specialized Services	13.8
Internet Access	10.2
Support Services	15.0



Source: TIA's 2006 Telecommunications Market Review and Forecast

International Market* and Trade in Telecom Equipment**

TIA's 2006 Telecommunications Market Review and Forecast covers Canada, Europe, Middle East/Africa, Latin America and Asia/Pacific — Middle East/Africa has been included in the Market Review and Forecast for the first time. Spending on telecommunications equipment and services for the five regions increased 11.4 percent in 2005 to \$2 trillion, a second consecutive double-digit increase.

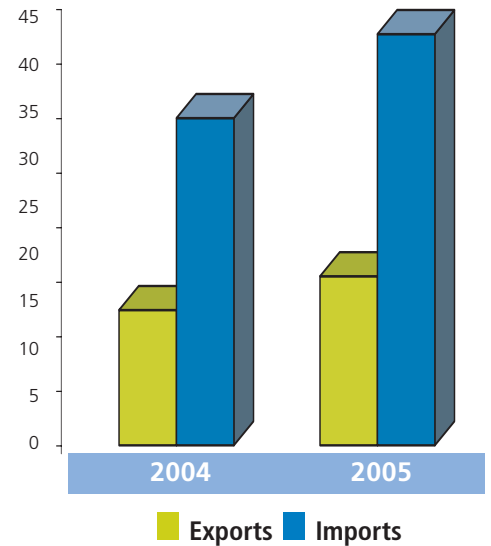
Equipment and software spending (network and enterprise) rose 8.9 percent to \$276 billion in the five regions. Transport services grew 8.2 percent to \$956 billion. Spending on services in support of equipment reached \$488 billion, a 16.5 percent increase.

Total U.S. trade volume in telecommunications equipment increased 14.0 percent in 2005 to \$59.6 billion. U.S. imports of telecommunications equipment rose 19.0 percent to \$43.8 billion, and exports grew to \$15.8 billion, an increase of 2.0 percent. The Netherlands led the top export markets for telecom equipment at \$1.8 billion, with Canada, Mexico, Japan and the United Kingdom following.

*Source: TIA's 2006 Telecommunications Market Review and Forecast

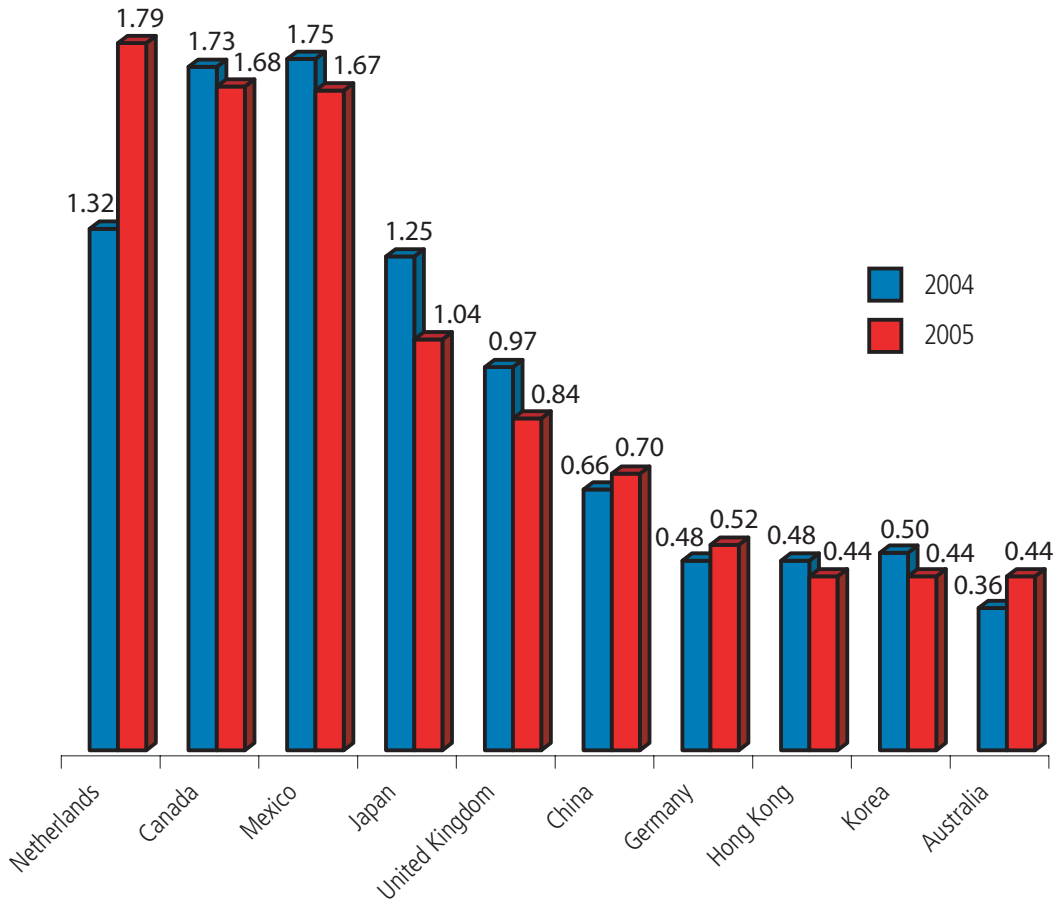
**Source: U.S. Department of Commerce

U.S. Trade in Telecommunications Equipment (\$ Billions)



Source: U.S. Department of Commerce

Top Ten Export Markets (\$ Billions)



Source: TIA's 2006 Telecommunications Market Review and Forecast



TIA Advances Standards Development

Standards development at TIA continued at full speed in 2005. The Standards and Technology Department took every opportunity to work with the standards program leadership to reduce costs, including hosting meetings at TIA instead of hotels, limiting travel only to essential trips and utilizing electronic work methods to facilitate greater productivity and meeting coverage. These efforts resulted in further reduced meeting costs and resources spent on supporting the groups. Human resources devoted to supporting standards development were also consequently reduced.

Accomplishments

TIA and its engineering committees, subcommittees and working groups continued to meet industry demand for standards documents and accomplished much in 2005.

- 95 new projects were opened, 176 standards proposals/ballots were issued
- 257 documents were published, reaffirmed, revised, upgraded or withdrawn

As secretariat, the association maintains more than 1,000 documents — from both TIA and the Third Generation Partnership Project 2 (3GPP2).

Staff continued to make improvements to TIA's Web and file transfer protocol (FTP) sites in 2005. These sites contain copies of the TIA Engineering Manual, advisory notes and forms used to process standards. In addition, wireless and wired local area networks use has been expanded for on-site distribution of work products created during engineering committee meetings as well as to provide broadband access for the meetings.

In 2005, the Engineering Manual Working Group of the Technical Committee completed its work on updating the TIA Engineering Manual and issued the fourth edition in March. The changes in the Engineering Manual were driven by recommendations from the routine American National Standards Institute (ANSI) audit and changes to the Intellectual Property Rights Management policy. Major changes in the Engineering Manual include:

- Inclusion of IMPORTANT NOTICE OF PARTICIPATION
- Statements of Policy, Intellectual Property Rights Policy
- Definitions
- Section 3.2.1, Eligibility for Participation in Formulating Groups
- Section 3.2.2, Formulating Group Balance
- ANNEX B, Section B. Procedures for Conducting Activities
- ANNEX H, Patent Holder Statement-Specific
- ANNEX H.1, Patent Holder Statement-General
- ANNEX I, Software Copyright Holder Statement
- ANNEX J, Software Evaluation License
- ANNEX K, Numbering of Documents

International Participation

On the international standards front, TIA participated in the work of the International Telecommunication Union (ITU) and its Telecommunication Standardization (ITU-T) and Radiocommunication (ITU-R) sectors, as well as in the work of the International Organization for Standardization (ISO), the International Electrotechnical Commission (IEC), and ISO/IEC Joint Technical Committee 1 on Information Technology (JTC 1).

A great deal of time was devoted to major issues such as support for public protection and disaster relief (i.e., public safety) activities, next-generation networks (e.g., packet data, fixed/mobile convergence), critical infrastructure and network security, as well as intellectual property rights policies across various development organizations, including copyright on source code used in ITU Recommendations or standards. TIA updated the ITU on changes, enhancements and new features added to its 3G wireless standards referenced by the ITU-R as part of the Union's International Mobile Telecommunications (IMT)-2000 initiative to develop global 3G standards. TIA also facilitated the referencing of a TIA-developed Internet protocol over satellite solution within multiple ITU-R draft Recommendations, and TR-30 and other TIA groups developed several IP-related contributions for input to ITU.

The association also remained actively involved in the Inter-American Telecommunication Commission (CITEL), an agency of the Organization of American States, including participating in preparatory activities and in the Global Standards Collaboration (GSC-10) meeting hosted August 30–September 2, 2005, in Sophia Antipolis, France by the European Telecommunications Standards Institute (ETSI). TIA is now preparing for GSC-11 to be hosted by TIA in Chicago in May/June 2006 in conjunction with GLOBALCOMM™ 2006.

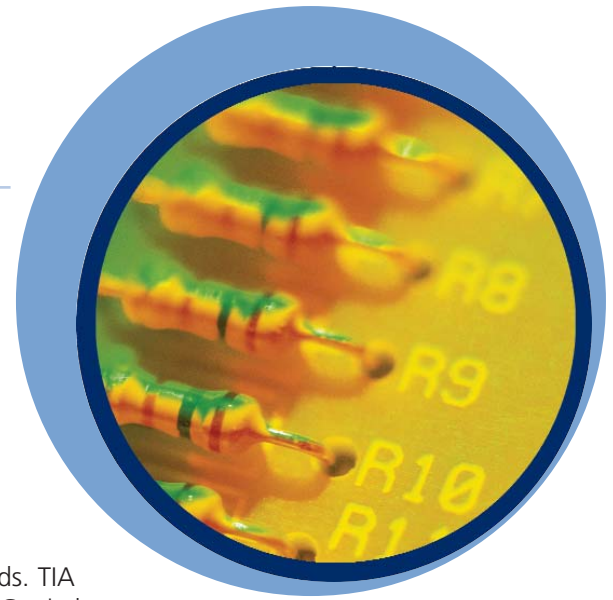
TIA continued in its role as participant in and the Secretariat to 3GPP2. 3GPP2 is a collaborative 3G telecommunications specifications-setting project and effort among five officially-recognized standards development organizations. It encompasses North American and Asian interests developing global specifications for ANSI/TIA/EIA-41 Cellular Radiotelecommunication Intersystem Operations network evolution to 3G and global specifications for the radio transmission technologies (RTTs) supported by ANSI/TIA/EIA-41. The SDO involved in this project are ARIB – Association of Radio Industries and Businesses (Japan); CCSA – China Communications Standards Association (China); TIA – Telecommunications Industry Association (North America); TTA – Telecommunications Technology Association (Korea); and TTC – Telecommunications Technology Committee (Japan).

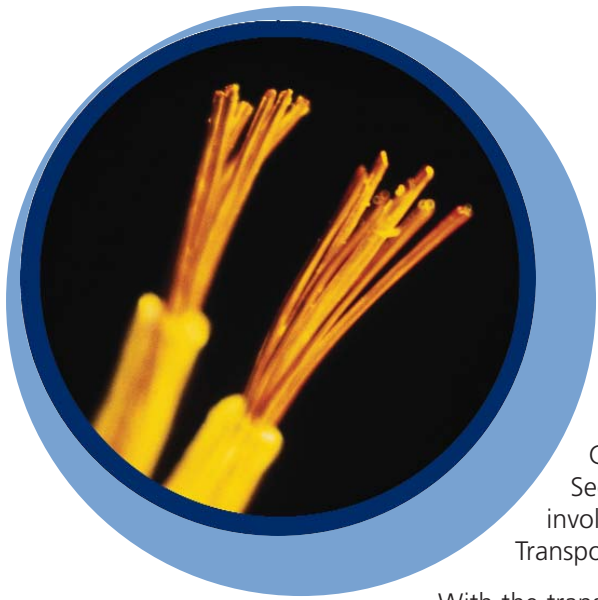
Together with ETSI, TIA also sponsors Project MESA – Mobility for Emergency and Safety Applications. Project MESA is a public-safety partnership that represents the first international initiative to involve users and organizations from the public protection, disaster response and civil defense sectors in the development of user requirements and specifications to meet broadband mobile communications needs. Interest in public safety standards has continued to grow both domestically and internationally as all seek enhanced capabilities and interoperability for first-responders and critical workers.

Leadership Roles

TIA maintained several other leadership roles in standardization in 2005, many of which are ongoing.

- Participated on the ANSI Board of Directors and ANSI Executive Committee, as well as in ANSI's Executive Standards Council, Company Member Forum, Consumer Interest Forum and Patent Group, and chaired the Copyright Group of the ANSI Executive Committee.
- Participated on the ANSI Organizational Member Forum and chaired its Digital Rights Management Ad Hoc. Held leadership positions in the U.S. National Committee to the International Electrotechnical Commission.
- TIA's Dan Bart continued as the private sector co-chair of ANSI's Homeland Security Standards Panel. (ANSI HSSP) and its Steering Committee which serves as an advisor to the United States experts to the ISO Security Advisory Group.
- Dan Bart was also named to the Executive Board of the National Institute for Urban Search and Rescue (NIUSR).





- Security standards were discussed at the January 2005 ANSI/ESO meeting in Washington, D.C., where TIA was the issue manager for voice over Internet protocol (VoIP), as well.
- TIA is part of the governance structure of the United States National Committee (USNC) to the International Electrotechnical Commission (IEC). TIA provides Secretariat and Technical Advisory Group (TAG) Administrator services to several IEC groups and TAGs. TIA was selected to lead a Working Group on wireless infrastructure for Sector Board 4 of the IEC. TIA is also the Secretariat for the U.S. Working Advisory Group 16 for ISO TC 204 WG 16, involving wireless communications protocols and interfaces for Intelligent Transport Systems.

With the transition to the new Department of Homeland Security (DHS) in 2003 and the release of President Bush's Homeland Security Presidential Directive 7 (HSPD-7), TIA continued in 2005 to serve as a Communications Sector Coordinator in support of HSPD-7 regarding critical infrastructure protection (CIP) and is a non-resident member of the National Coordinating Center Communications Information Sharing and Analysis Center (NCC T ISAC). Furthermore, TIA has a board seat on the Partnership for Critical Infrastructure Security (PCIS), which handles cross-sector CIP issues, and Dan Bart was the representative for the Communications Sector to the PCIS and elected its Secretary Treasurer.

Also in 2005:

- TIA was part of the Emergency Notification System (ENS) of the DHS Information Analysis Infrastructure Protection Directorate (DHS IAIP).
- TIA participated in several ANSI HSSP activities including its plenary meeting and being workshop moderator for an Emergency Communications Workshop in December. The ANSI HSSP, as another cross-sector activity, is the coordinating body for the development and enhancement of homeland security and emergency preparedness standards and conformity assessment, as developed by ANSI members and non-ANSI members.
- TIA and its members were involved in the activities of President Bush's National Infrastructure Advisory Council (NIAC). Recent activity included prioritization of Cyber Vulnerabilities, Intelligence Community coordination, Sector Partnership Model, and a new activity on Chem/Bio/Rad threats.
- As a Sector Coordinator and neutral industry forum, TIA provided input to the draft National Infrastructure Protection Plan (NIPP) and the Sector-Specific Plan (SSP).
- TIA was asked to participate on a National Security Telecommunications Advisory Committee (NSTAC) Industry Executive Subcommittee Task Force focusing on next-generation networks (NGN) national security/emergency preparedness (NS/EP) needs and Task Forces on the NCC and Emergency Communications and Interoperability. TIA is actively participating in working groups of the task forces.
- TIA also participated in the Department of Commerce's Economic Security Working Group (EconSec WG) meetings and participates in its subgroups involving such topics as international outreach, research and development, and support for bi/multi-lateral meetings.
- In 2005 Susan Hoyler, a long-time asset of the Standards and Technology Department, departed, as she advanced her professional career with a TIA member company. Henry Cuschieri was promoted to Senior Director at TIA and is now responsible for the majority of TIA's domestic and international standards activities.

TIA Influences Public Policy

TIA is a respected advocate for public policies that promote competition, innovation and investment, and that foster a climate conducive to the continued emergence of new communications technologies. TIA's public policy efforts in 2005 focused on extensively representing TIA members on a wide range of legislative, regulatory and policy issues affecting the converging communications technology industry.

TIA is very focused on:

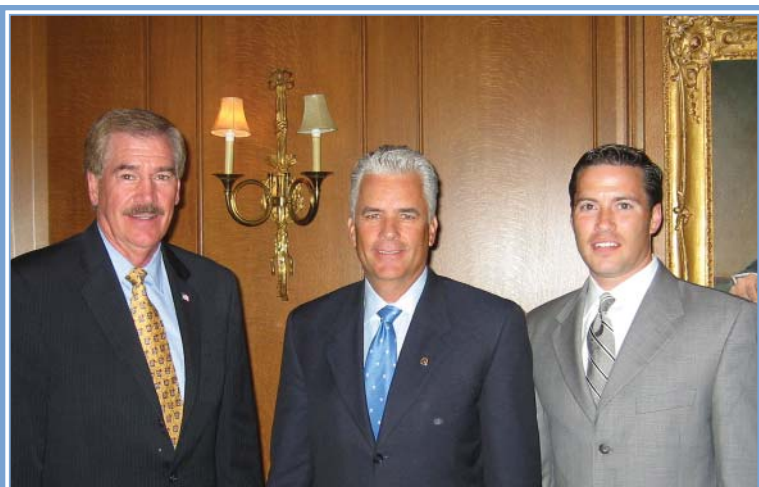
- Convergence of networks, technologies and services driven by IP
- Nationwide, next-generation, multi-platform broadband deployment
- Availability of spectrum for commercial and public safety advanced communications
- Removal of barriers for new entrants into the voice and video distribution markets
- Ensuring that the United States communications sector continues to be a world leader in advanced research
- Ensuring a level playing field and fair competition in global markets

During 2005, TIA hosted Broadband & Technology Luncheons and policy-oriented conferences, which featured a wide array of senior U.S. government policymakers, including Federal Communications Commission (FCC) Chairman Kevin Martin, Commissioner Jonathan Adelstein and former Commissioner Kathleen Abernathy, Senators George Allen (R-Va.), John Ensign (R-Nev.), John Sununu (R-N.H.), Bill Nelson (R-Fla.), House Telecom Subcommittee Chairman Fred Upton (R-Mich.), Representatives Marsha Blackburn (R-Tenn.), Cliff Stearns (R-Fla.), Chip Pickering (R-Miss.), Rick Boucher (D-Va.), Lee Terry (R-Neb.), Jay Inslee (D-Wash.), Senate Commerce Committee Chief of Staff Lisa Sutherland, House Commerce Committee Chief of Staff Bud Albright, National Telecommunications and Information Administration (NTIA) Administrator Mike Gallagher and Ambassador David Gross, U.S. Coordinator for International Communications & Information Policy.

Domestic Policy

As networks, technologies, devices and services converge, there is fierce competition to win both business and residential consumers. However, these changes in technology and the marketplace also increasingly have put pressure on the legal and regulatory frameworks governing the industry. For example, Congress has continued to reexamine the *Telecommunications Act of 1996*, and the FCC has wrestled with numerous open proceedings, pending petitions and court cases. TIA has held numerous meetings on these issues, using the "TIA Convergence Policy Agenda" and supplemental position statements as a framework for the association's efforts to ensure its voice is heard by policymakers.

TIA has focused extensively on these issues, as well as others of importance to TIA members, including federal funding for interoperability of public safety equipment and networks,



From left: TIA President Matthew Flanigan, Senator John Ensign (R-Nev.) and TIA Executive Vice President Grant Seiffert at a Broadband & Technology Dialogue Luncheon in July 2005. Senator Ensign is a member of the Senate Commerce Committee, chairs the Subcommittee on Technology, Innovation and Competitiveness of the Commerce Committee and the Republican High Tech Task Force.

Enhanced 911 (E911) and homeland security/critical infrastructure protection/network security and reliability.

■ TELECOM ACT REFORM

■ In 2005, the House Energy and Commerce Committee, Subcommittee on Telecommunications and the Internet introduced a staff discussion draft of legislation it hoped would spur deployment of innovative Internet services for consumers. Among its highlights, the draft attempted to provide a largely uniform federal regulatory framework for broadband Internet access, voice over Internet protocol (VoIP) and broadband video. The subcommittee also sought to ensure network neutrality to prevent broadband providers from blocking subscriber access to lawful content. Broadband video providers, as narrowly defined in the bill, would be afforded a streamlined franchising process, but would incur many of the obligations of current cable video operators. It would also permit municipalities to offer broadband services, with safeguards to guard against unfair competition.

■ After meeting with the drafters of the legislation, TIA was asked to identify and propose specific edits. The Convergence Policy Working Group (CPWG) carefully considered the language of the draft bill, and TIA submitted its proposed edits on September 27, 2005. The submission also identified general concerns as to whether the draft met the important goals of reducing regulation and promoting innovation, investment and competition, as well as pointing out more specific problems with certain provisions.

■ BROADBAND DEPLOYMENT

■ In 2004, President George W. Bush called for universal access to broadband connectivity by 2007. Many of the administration's ideas dovetail with TIA's advocacy over the past several years, including a regulatory framework encouraging investment and deployment, additional commercial spectrum for broadband networks and passage of the spectrum relocation fund bill, and removal of barriers to deployment including with rights-of-way administration. TIA also continued to support legislation providing fiscal incentives for broadband deployment and continued to work closely with the U.S. Department of Agriculture to support its Rural Utility Service broadband loan program.

■ In 2005, TIA remained focused on communicating to the FCC, Congress and the White House the urgent need for national policies that encourage widespread broadband deployment. TIA, a vocal and active leader in the call for a national broadband policy and strategy, continued to educate policymakers on the stimulative effects of broadband for both the nation's economy and its future competitive position in the global marketplace.

■ SPECTRUM MANAGEMENT

■ TIA persevered in its efforts on Capitol Hill for legislation to put a "hard deadline" in place for broadcasters to vacate the spectrum they use for analog broadcasts as they move to new allocations for digital television (DTV). Conversion to DTV will clear valuable spectrum for other important uses, such as advanced wireless services with both commercial and public safety applications. The DTV transition will clear 108 MHz of spectrum in the 700 MHz band. The propagation characteristics of this particular spectrum band make it extremely desirable for new innovative broadband applications and state-of-the-art first-responder communications.

■ In 2005, TIA held over 185 meetings with representatives, senators and key congressional staff; adopted a position statement that identified key principles; wrote numerous letters encouraging a date certain for the transition; and



TIA Members Dr. Irwin Jacobs Chairman and CEO, QUALCOMM (left) and Edward Zander, CEO, Motorola (right), with TIA Executive VP Grant Seiffert after the House of Representatives Energy and Commerce Committee's Subcommittee on Telecommunications and the Internet's hearing on "How Internet Protocol-Enabled Services are Changing the Face of Communications: A View from Technology Companies," in February 2005, where Jacobs and Zander both testified.

participated in events, functions and educational sessions on the issue.

■ COMMUNICATIONS-SPECIFIC BASIC RESEARCH FUNDING

Increasing federal funding for communications-specific basic research and ensuring that the U.S. communications industry continues to be a world leader in advanced research are TIA priorities. In response to these priorities, the TIA Board of Directors approved the creation of the Communications Research Division (CRD) in August 2005. The CRD, led by chief technology officers, heads of research and government relations experts within TIA member companies, is the first TIA division to be created in more than 10 years. The division spent the past year developing relationships with and educating policymakers at all levels of the U.S. government, including the administration, science-oriented federal agencies and Congress. By developing these relationships and advocating research allocations in the federal budget, the division aims to increase the amount of money available for contracts in communications-focused basic research. Between September and December 2005, the CRD met three times, elected its leadership, created and approved its scope and mission and raised its visibility within all levels of the U.S. federal government. It also began working with senior federal agency officials to convene a conference in late 2006 that will result in a roadmap for industry and government agencies in the areas of networking security and networking architectures.



Members of TIA's Communications Research Division (from left): David Digiovani, OFS; Rob Kubik, Motorola; Rob Holland, Ulticom; David Borth, Motorola; Jake MacLeod, Bechtel Telecommunications; Jeff Jaffe, Lucent; Adam Drobot, Telcordia Technologies. The CRD mission is to ensure that the U.S. communications sector continues to be a world leader in advanced research.

International Policy

TIA addresses key market access barriers members face in conducting business abroad and advocates policies that encourage growth in the telecom sector globally.

■ INTERNATIONAL TRADE

- Submitted comments to the U.S. Trade Representative for its annual Section 1377 Review (compliance with telecom trade agreements) and the annual National Trade Estimate Report on Foreign Trade Barriers (NTE). Comments directly reflect member company trade concerns impacting the bottom line of global operations.
- Supported the Doha Development Agenda talks and specifically the Non-Agriculture Market Access (NAMA), Services and Electronics Sectoral discussions, which are likely to lead to reductions in non-tariff barriers in the communications sector.
- Supported bilateral negotiations with key communications growth markets, such as China, India, Korea, Malaysia, Thailand and Vietnam.
- Participated in regional trade and standards dialogues in the APEC Telecommunications and Information Working Group (TEL), CITELE and the International Telecommunication Union.

■ CHINA AND USITO

- Worked with member companies to identify specific market access problems in China and with the U.S. government to ensure that TIA priorities were included in bilateral talks. Key among these issues is the importance of a Chinese commitment to release third-generation (3G) mobile licenses in a manner that will not favor one technology. TIA's work resulted in a restatement and clarification of a previous commitment to technology neutrality for 3G services.
- Coordinated with United States Information Technology Office (USITO), TIA's affiliate office in Beijing, to promote trade and cooperation between the information technology industries of the United States and China. TIA strives to make the Chinese IT market more accessible to TIA companies by providing market development assistance and information on government policy, regulations and trends in key IT markets. USITO has also undertaken a number of policy initiatives related to convergence, competition, sustainability and new media and has an active program for member companies in Beijing.

■ INDIA

- Coordinated with the U.S. Departments of State and Commerce, the U.S. Embassy in New Delhi, the Foreign Commercial Service, U.S. Trade Representative and other associations and helped shape industry participation at the inaugural meeting of the U.S.-India ICT dialogue in Washington, D.C., in December 2005. The ICT working group was announced by President Bush and Indian Prime Minister Manmohan Singh on July 18, 2005, and TIA led the substantive discussions for industry in the communications sector.
- Exchanged information with Indian government officials on spectrum policy, ICT market development in India and other priority areas for member companies with the goal of making the bilateral business relationship deeper and more robust.
- Produced industry issues paper for governments to review as bilateral discussions move forward, some resulting in policy changes and others used as a basis for ongoing discussion.

■ INTERNATIONAL POLICY OUTREACH

- Hosted U.S. government, foreign government and private sector delegations that influence the telecommunications industry and policy in Afghanistan, China, Hong Kong, India, Iraq, Israel, Jordan, Malaysia, Romania, Russia, Saudi Arabia, and Thailand.
- Established dialogues with numerous foreign embassy representatives in Washington, D.C. on key issues affecting TIA member companies around the world, including regulatory independence, policy approaches to new technologies and standards development.

■ APEC TEL

- Continued active participation and contributions to the Asia-Pacific Economic Cooperation (APEC) Telecommunications and Information Working Group (TEL). In 2005, TIA contributed language and support in the adoption of the Key Principles of Broadband Deployment in the APEC Region.
- Produced an industry paper reflecting priorities and suggested language for key industry concerns in the TEL. The TEL addresses a number of issues important to TIA members including broadband deployment and regulatory issues affecting market access and infrastructure deployment, implementation of the APEC Mutual Recognition Arrangement (MRA) for Conformity Assessment of Telecom Equipment and, currently, a disaster warning system.

■ PUBLICATIONS AND OTHER ACTIVITIES

- Kept TIA members informed about ongoing international activities, policy and trade issues and business opportunities via one of TIA's monthly publications, *TIA International Informer*, and regular email communications updates.
- Worked closely with members in the International Committee to develop objectives and priorities in markets around the world.
- Prepared extensive materials intended to help small and medium-sized companies grow their markets overseas.

GLOBALCOMM™ 2006

In 2005, TIA's external affairs and global policy department began planning and coordination for policy programming during GLOBALCOMM™ 2006. The 2006 government-related programming, GLOBALCOMM™ Government Summit, will take place June 4-5 and will include exclusive, focused programming, as well as programming supplemented by other parts of the show. FCC Chairman Kevin Martin's keynote address will be incorporated in the agenda, and FCC Commissioners Deborah Tate and Jonathan Adelstein will participate in an FCC Commissioners Luncheon. The Government Summit will close with the GLOBALCOMM™ Dinner on the evening of Monday, June 5. Additionally, the policy department has been working to confirm the attendance of high-level participants from Congress, the FCC and other government agencies to create programming that will add value to the overall programming at GLOBALCOMM™ 2006. (See content/education portion of GLOBALCOMM™ report for more information on program planning.)

Product-Oriented Divisions

In many instances, TIA supports its members' interests in technical regulatory matters through its product-oriented divisions.

■ WIRELESS COMMUNICATIONS DIVISION

The Wireless Communications Division (WCD) continues to be very active, providing engineering and technical guidance on diverse TIA activities including legislative, regulatory, trade and spectrum issues. Specifically, WCD provided technical expertise for TIA filings on subjects as diverse as advanced wireless services including third-generation (3G), additional spectrum allocations, spread spectrum devices, cellular and PCS rules, E911, emergency alert systems, out-of-band emission limits, unlicensed devices and wireless broadband, and spectrum issues for public safety.

The division again focused attention on interoperability in communications systems used by first responders including participation in Project MESA (Broadband Mobility for Emergency and Safety Applications).

WCD's Private Radio Section recommended changes to the FCC's rules for public safety transmitters and participated in the work of the National Coordination Committee and Project MESA.

■ SATELLITE COMMUNICATIONS DIVISION

The mission of the Satellite Communications Division (SCD) is to address issues affecting the continued development of the satellite industry, such as interoperability and utilization of scarce spectrum. SCD has overseen the continued development of a standard for Internet protocol over satellite communications and worked towards the global harmonization of the IP over satellite standard within the International Telecommunication Union. Members of the division also actively participate in TIA's Spectrum Policy Working Group.

■ USER PREMISES EQUIPMENT DIVISION

The User Premises Equipment Division (UPED) works on regulatory issues affecting manufacturers and suppliers of customer premises equipment (CPE).

Primary focus areas for UPED in 2005 were hearing aid compatibility (HAC), Section 508 of the Rehabilitation Act, voice over IP and E911 issues. UPED provided technical expertise for a range of TIA filings.

The policy and regulatory implications of widespread deployment of VoIP technologies have been discussed, especially as they relate to HAC, teletypewriters (TTY) and E911.

UPED's Cordless Telephone HAC Working Group addresses issues raised by the disability community with accessibility. The working group has met with FCC officials, university researchers, standards developers and advocates for the hearing disabled to coordinate a resolution to the issues.

■ FIBER OPTICS DIVISION

The Fiber Optics Division (FOD) is an important contributor to TIA's aggressive advocacy efforts before the FCC on its series of proceedings to develop a framework for regulation of broadband services and facilities.



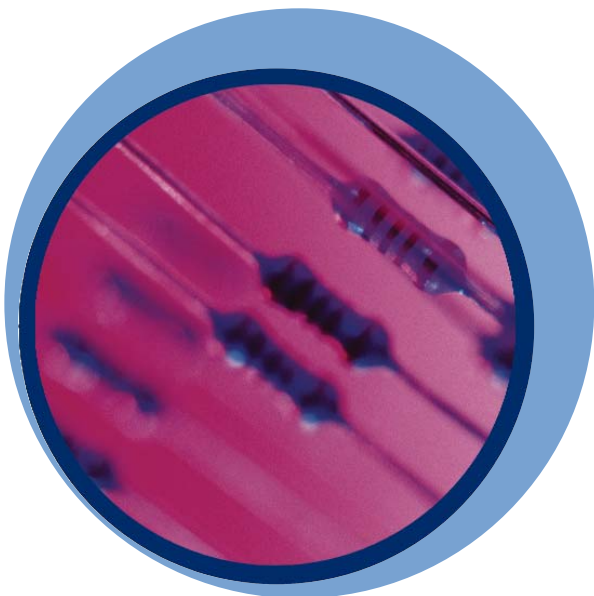
TIA President Matthew Flanigan presents Congressman Chip Pickering (R.-Miss.) with the Spirit of Innovation Award at the 2005 Summer Board of Directors meeting for his role and leadership serving on the House Energy and Commerce Committee.



FOD continues working towards removing the regulatory disincentives to investment in new broadband facilities, critical to fostering an environment conducive to pushing fiber out to customers' premises.

WCD and UPED participate in the Technical Regulatory Issues Committee (TRIC) dialogue with the FCC's Office of Engineering and Technology (OET) leading to streamlining the FCC's rules and accelerating FCC processing of product certifications.

TIA held its sixth annual Spring Policy Summit, where industry representatives and government staff members were able to communicate their interests and concerns regarding telecom legislation and regulation to Congressional staff. The agenda included a keynote address by Mike Gallagher, Assistant Secretary of Commerce and National Telecommunications and Information Administration (NTIA) Administrator and FCC officials, as well as a keynote by Acting Administrator of the Rural Utility Service (RUS) Curtis Anderson, who spoke briefly about rural development and the Broadband Loan Program. Congressman Charles Gonzalez (D-Texas), who serves on the House Energy and Commerce Committee, also spoke at the event.





TIA Builds Business Opportunities

Global Opportunities Call for GLOBALCOMM™ Events by TIA

All eyes were on Chicago last year, as the association prepared to launch GLOBALCOMM™ 2006 while again delivering another very successful and final SUPERCOMM®. As nearly 28,000 industry and government attendees gathered for SUPERCOMM® 2005 — the last in a distinguished 18-year series — staff members were already hard at work on TIA's new annual exhibition and conference series aimed at the global information and communications technology (ICT) market.

For TIA, GLOBALCOMM™ replaces SUPERCOMM® as the next-generation communications marketplace and summit for the entire ICT industry. GLOBALCOMM™ 2006 will be held June 4–8 at Chicago's McCormick Place.

With the Asia/Pacific region growing so fast, and with China and India combined accounting for 40 percent of the world's population, the time is right for a new exhibition and conference responding to the immense opportunities. Hence the launch of GLOBALCOMM™ 2006 in the United States, as well as GLOBALCOMM™ INDIA 2006 in New Delhi, February 20–22 — the latter by TIA and co-organizer Inter Ads Ltd.

GLOBALCOMM™ 2006 in Chicago will feature more than 500 exhibitors and 20,000 attendees, 180,000 net square feet of exhibit space, hundreds of program sessions for service providers and enterprise managers alike, plus a co-location with the OSP EXPO and Conference and with many other events. The launch of a new exhibition with such strong numbers is unprecedented and reflects well on TIA's excellent reputation for producing trade shows and other first class programs.

The wide variety of conferences, demonstrations and special activities at GLOBALCOMM™ 2006 will reach out to the broad, horizontal mix of demographics targeted by the show... service providers, enterprises/end users and others, such as government officials, consultants, manufacturers and members of the media.

TIA is organizing much of the programming, including three GLOBALCOMM™ Summits targeting developments in the Americas; Europe, Middle East, Africa; and the Asia/Pacific region. The association is also producing the Innovations Summit, as well as its annual Supplier Diversity Summit, the Government Summit and Executive Summit.

Collaborating organizations are offering a wide variety of additional programs, such as the very popular International Engineering Consortium Communications Forums and Executive Forum; the Outside Plant Exposition and Conference by Practical Communications; and WiMAX Strategies by FierceMarkets Inc. In addition, *CMP/Light Reading* is offering its DataComm Enterprise Conference, *Telephony* magazine is organizing its IP Summit and UPLC is hosting its Broadband over Power Lines Conference.

On the exhibit floor itself, *Telecommunications* magazine and TIA are offering Telecom U as part of the publication's expanded exhibit area. In addition, the Interoperability in Action demonstrations are being produced by the Metro Ethernet Forum, WiMAX Forum, TeleManagement Forum, MultiServices Forum, IMS Forum, University of New Hampshire Interoperability Laboratories (UNH-IOL) and Multimedia over Coax Alliance (MoCA). Of special note is the IP Video Pavilion, organized by TIA and Light Reading. For additional information about GLOBALCOMM™ 2006, including the stellar line-up of keynote speakers and panels, visit

www.globalcomm2006.com.

 **GLOBALCOMM™**

powered by  **TIA®**



From left: TIA Vice Chair Rob Pullen of Tellabs, FCC Chair Kevin J. Martin and TIA Chair Van Cullens of Westell Technologies Inc. at final SUPERCOMM®.

Final SUPERCOMM® draws huge crowds at Chicago's McCormick Place, June 6–9, 2005.

SUPERCOMM® 2005 Concludes Distinguished 18-Year Series

With 670 exhibits, 150 program sessions and many outstanding keynotes, SUPERCOMM® 2005 wrapped up the world-class show series last June in Chicago's McCormick Place. The IEC again co-located its Communications Forums and Executive Forum during the June 6–9 event, and many other organizations conducted programming to complement the exhibition and conferences offered by SUPERCOMM® itself.

Since the exhibition's launch in 1988 in Atlanta, it built a world-class reputation and following as it moved around the United States to venues in cities such as Dallas, New Orleans, Anaheim, Atlanta and Chicago. The association managed the trade show throughout the 18-year run, and now turns its focus on the success of TIA's GLOBALCOMM™ series.



Valedictory Panel moderated by U.S. Ambassador David Gross during final days of GLOBALCOMM™ INDIA 2006.

International Shows Continue to Offer Marketing Opportunities

Hundreds of association members participate in exhibitions outside the United States to penetrate new markets and seek sales opportunities in Asia, the Americas and elsewhere, where many countries are enjoying a growth rate far higher than the United States.

October 3–6, 2005, TIA organized the USA Pavilion in the International Telecommunication Union's ITU TELECOM AMERICAS in Brazil. December 4–8, 2006, TIA will bring an even bigger opportunity via ITU TELECOM WORLD 2006 in Hong Kong. ITU shows attract the highest levels of qualified industry buyers and very senior government officials to help exhibitors network and evaluate investment potential.

In addition, in 2005 TIA conducted SUPERCOMM® INDIA for the fourth consecutive year in New Delhi and launched the GLOBALCOMM™ brand there February 20–22, 2006, with nearly 100 exhibitors and nearly 10,000 attendees from government and industry. Mark your calendar now for GLOBALCOMM™ INDIA 2007, February 7–9.



VIPs tour TATA Indicom booth at GLOBALCOMM™ INDIA 2006.

The majority of TIA member companies are doing business outside the United States, recognizing the potential that exists throughout the world. You are invited to participate in TIA's exhibitions, to learn firsthand how strong the opportunities are and how important they are for your company's future.

2006

- ❖ GLOBALCOMM™ INDIA
February 20-22, 2006, New Delhi, India
www.globalcomm-india.com
- ❖ 7th Annual Spring Policy Summit
Connectivity, Convergence and Consumer Choice
April 28-30, 2006, Cambridge, Maryland
- ❖ GLOBALCOMM™ 2006
June 4-8, 2006, McCormick Place, Chicago
www.globalcomm2006.com
- ❖ ITU TELECOM WORLD 2006
Official USA Pavilion, December 4-8, 2006
Hong Kong, China
<http://www.itu.int/ITUTELECOM/>

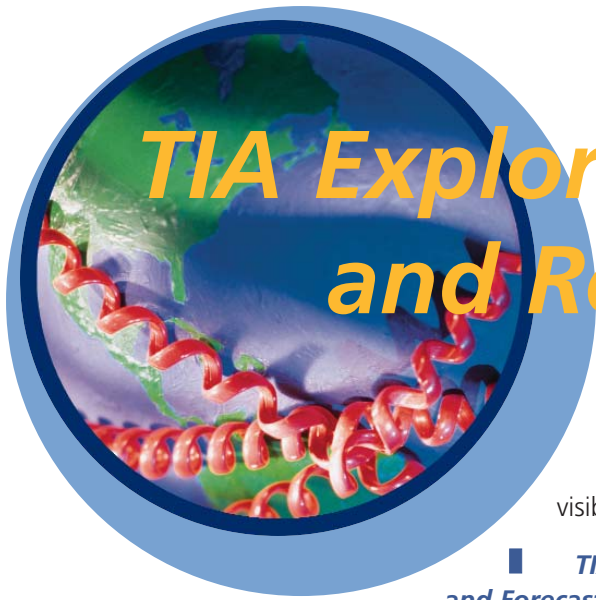
2007

- ❖ GLOBALCOMM™ INDIA
February 7-9, 2007, New Delhi, India
www.globalcomm-india.com
- ❖ GLOBALCOMM™ 2007
June 17-20, 2007, McCormick Place, Chicago

For sales information, contact Tripp Taylor,
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GLOBALCOMM™ is a trademark of the Telecommunications Industry Association. The Next-Generation Communications Marketplace and Summit will take place June 4-8, 2006, at Chicago's McCormick Place. For more information, go to www.globalcomm2006.com.

SUPERCOMM® is a registered trademark of the Telecommunications Industry Association (TIA) and the United States Telecom Association (USTA). The final SUPERCOMM® was held in June 2005.



TIA Explores New Markets and Relationships

TIA has developed relationships with a variety of industry partners and trade publications to increase its visibility in the marketplace. In 2005, TIA planned for:

TIA's 2006 Telecommunications Market Review and Forecast

Published in February 2006, the *Market Review and Forecast* expanded its international coverage to give companies the information necessary to explore new business opportunities and provide their customers overseas with new and innovative products, services and solutions. TIA continues to update subscribers with trends happening in the marketplace with its complimentary e-newsletter, *TechTrends*, which provides timely industry data and analysis four times a year.



Telecom U Webcast Series

TIA teamed up with *Telecommunications* magazine to offer association members and the industry Webinars focused on relevant information about the technologies, services and applications companies need to optimize their networks, streamline their business operations, deploy new services and understand customer needs. These Webinars lead up to Telecom U Webcast sessions on the GLOBALCOMM™ 2006 show floor in Chicago, June 4-8, 2006.



TIA Week

As part of an extensive agreement between TIA and Light Reading, a division of CMP Media, the two groups planned for *TIA Week* to launch in 2006, a new weekly e-newsletter focused on the hottest trends in next-generation communications.

TIA Week will reach more than 51,000 qualified readers located all around the world (35 percent of readers are from Europe and Asia). It will also boast the largest and best-qualified circulation of any publication covering next-gen communications; 80 percent of its readership is actively involved in approving, recommending or specifying the purchase of communications technology and services.



GLOBALCOMM™ 2006 Master Class Series

TIA and Light Reading launched a new signature event: The GLOBALCOMM™ 2006 Master Class Series. The programs began in December 2005 and provide a preview of the critical industry issues to be covered at GLOBALCOMM™.



Small Business Focus

TIA's small business development initiatives serve member companies with annual telecommunications revenues of less than \$35 million. Small companies comprise approximately 80 percent of TIA's membership.

The TIA Advantage Program for small companies is designed to connect these members with potential customers and spotlight opportunities that can directly impact companies' bottom line.



■ Small Business Development Committee

Members on the committee receive information about resources and networking opportunities for small companies to foster business partnerships and generate sales leads.

- New members and small company product and service offerings are featured in the association's publications such as the TIA's *Industry Beat* and TIA's *PulseOnline* to build awareness of small company offerings.

Supplier Diversity

More than 600 people participated in the tenth annual presentation of the TIA Supplier Diversity Summit held at SUPERCOMM® 2005. The summit was an anniversary celebration and culmination of TIA's efforts to provide insight and focus on the latest business, political, regulatory and technical activities in the telecommunications industry for supplier diversity teams.

The morning panel session, entitled "View from the Top: A Decade of Success Charting the Future of Supplier Diversity," was composed of executives from service providers, original equipment manufacturers and electronic manufacturing services, who spoke on how Supplier Diversity has been integrated into their operations, marketing, sales and customer service processes over the past decade.

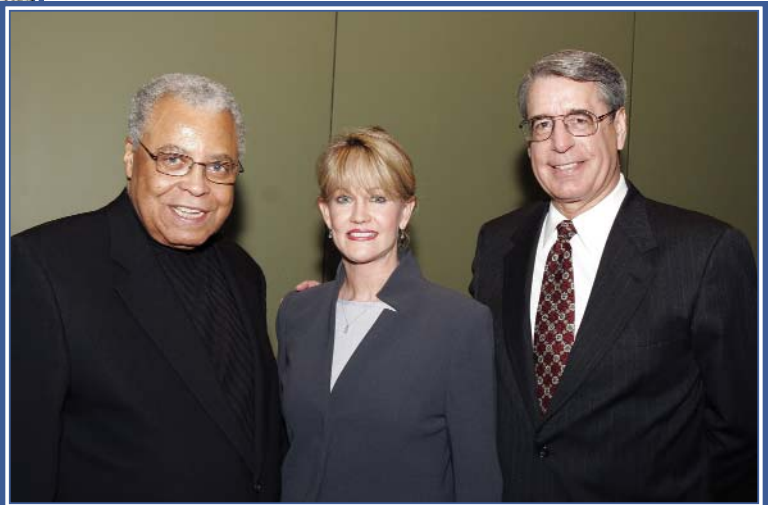
Following a networking luncheon, participants met for the afternoon panel session entitled, "The Unique Value Proposition: The Case for Supplier Diversity in Telecommunications." This session presented two supply chain teams that effectively advocate supplier diversity within their organizations. Both teams shared their stories and the long-term value of supplier diversity for their companies.

The event concluded with a special anniversary dinner and appearance of award-winning actor and Verizon spokesperson James Earl Jones.



The 2006 Supplier Diversity Summit at GLOBALCOMM™ will continue to lead the industry in providing focus and insight into the latest activities in the information and communications technology industry to small businesses and Minority-, Women- and Disabled Veteran-Owned-Business Enterprises (MWDVBEs). In 2006, the Supplier Diversity panels and participants will discuss how to identify, access and navigate government resources and turn those resources into results for small businesses.

(Above): The VIP Panel at the 10th Annual TIA Supplier Diversity Summit.



(Right): James Earl Jones with Jane Cullens TIA Chairman E. Van Cullens at the 10th Annual TIA Supplier Diversity Summit.



TIA Promotes the Industry

TIA's external communications promote the industry, issues vital to the association's membership and TIA members' technologies and services.

The association's proactive media outreach resulted in coverage in *Fortune*, *Financial Times*, *Chicago Sun-Times*, *Chicago Tribune*, *Bloomberg*, *Telephony*, *RCR*, *America's Network*, *Tradeshow Week*, *Phone+*, *BusinessWeek* and *Communications Daily*, to name only a few.

Broadband policy and public safety and first responder issues have been among TIA's priorities, and many interviews addressed these topics. TIA is part of an international broadband communications partnership project, Project MESA, with the European Telecommunications Standards Institute (ETSI) and took an active role in media collaboration efforts to promote global standards for public safety applications. TIA also worked closely with the Fiber-to-the-Home Council to express the importance of increasing broadband deployment and related technologies and services to the home.

Publications

TIA publications serve as an industry resource. **TIA's Telecommunications Market Review and Forecast** is the association's annual study, providing an overview of telecom's interrelated segments including network services, enterprise and consumer, mobile and wireless communications, and international markets.



TIA's **TechTrends** is an e-newsletter that complements *TIA's Telecommunications Market Review and Forecast* by providing timely industry data and analysis four times a year.

TIA also produces a monthly online newsletter, *PulseOnline*; a weekly e-newsletter, *TIAWeek*, with Light Reading; an **Annual Report**; a **Standards and Technology Annual Report (STAR)**, a **Public Policy Industry Playbook** and an online membership directory.

In addition, the **International Informer** and **TIA Weekly Advance** are e-newsletters that update members on policy issues and Washington, D.C., happenings. **Standards Digest** keeps those in the TIA standards program informed about what is hot and what is not.

Internet and Web Development

TIA's award-winning site, tiaonline.org, is designed to be a business facilitator for member companies and an information portal for individual employees of member companies. The site aims to promote wide general industry awareness of telecom standards, issues, events and market development opportunities while promoting open discussion.

Employees of member companies can sign up for a personalized search for standards (then click through to purchase), watch video, search or browse TIA's press archives, download market development white papers and teleforum transcripts (members only in most cases), order a publication online, view PowerPoint presentations posted from past events, and much, much more.

In 2005, the association continued to improve its Web site and planned for a redesign of the site. In 2005, GLOBALCOMM2006.com launched and online attendee registration opened in October. In 2005, tiaonline.org achieved a total of 7.9 million external page views, an increase of 300,000 page views over the previous year.



The TIA site has been streamlined so members can find what they need quickly. Enhancements include:

- **Navigation** – Easy to use Flash navigation allows members to get where they are going quickly.
- **Members-Only User Account** – Members can log into their User Account directly from the home page. The User Account is the upgrade to the Members-Only section and includes personal online updates of a company's profile so the information is current and provides them the opportunity to receive email alerts to incoming press releases, new e-newsletter editions, etc.
- **Member Listings** – Scrolling member company listings on the home page promote member companies. The TIA member directory can be searched for company details and products/services offered.
- **Search** – Members can conduct a search from any Web page, powered by Google.
- **Infrastructure** – The structure of the Web site provides members upgraded security, usability and reliability.





ADVANCING GLOBAL COMMUNICATIONS

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TIA represents the communications sector
of the Electronic Industries Alliance.