

Vendors installed and under evaluation

As a starting point, it is important to understand the composition of the installed base among our respondents. This provides a baseline for the assessment in this survey and ties feedback on key evaluation criteria to actual experience with the different vendors. We add to this a view of which vendors are being evaluated for future deployments. This provides an indication of potential future performance and represents in itself a view of vendor perception in the market.

Rather than choosing names from a list of specific companies, respondents answered an open-ended question, naming the vendors of optical transmission and switching equipment currently installed in their networks and those they are evaluating (including installed and/or new vendors) for equipment to be added to their networks by year-end 2020.

Ciena and Huawei came out as the top two installed vendors this year, consistent with what we have observed in our surveys over the past three years. This is also aligned with positioning in the global optical network equipment market, where Huawei and Ciena are the top two vendors by market share in the period assessed. Infinera punched above its weight—the company is currently the #5 player by market share, but its equipment was installed by 29% of our survey respondents, the third highest in this group. We expect part of this is due to the combination of Coriant and Infinera in this year's survey; Coriant brought to Infinera net-new installed base customers in Europe and the Americas, areas well represented by our survey respondents this year. ZTE by contrast came out lower on this list—largely because a significant part of its business is in China and emerging countries, where we had lower representation in this survey.

For vendors under evaluation, Ciena, Infinera, and Nokia were all tied with 21% of respondents, indicating these companies were under evaluation for new builds to be deployed before 2020. Huawei and Cisco were next, with 14% of our respondents evaluating optical networking solutions from these companies for deployment.

