
Posted to the Gilder forum - March 5, 2000

Ides of March

Julius Caesar did not beware of the Ides of March and it cost him his life. He was probably too busy thinking of his last or next conquest. Pretty arrogant fellow: "Vini, Vidi, Vici."

On Monday the 13th of March Gilder and Esther Dyson's PC Forum will announce:

"...a radical new last mile technology ... to fulfill the spectronics paradigm--the ultimate up spectrum star--light over air at gigabits per second in a cellular topology."

"These up-spectrum wireless companies face devastating consequences unless they too learn to ride the light without a fiber net, which won't be easy. Nextlink has a broad portfolio and strategy and may be shielded from some of the effects. Teligent will have to focus on smaller cities and businesses. The MMDS companies (at 2.5 gigahertz) may still find a good market in small towns and rural areas that require a larger reach than wireless optics affords (3 kilometers in medium weather environments)."

By Wednesday, the Ides of March, the herd will have heard and all hell could break loose.

Nextlink and Teligent Stock Holders:

Beware of the Ides of March!"

Denny