

CONTENTS

I. INTRODUCTION, METHODOLOGY & PRODUCT DEFINITIONS

Study Reliability and Reporting Limitations I-1
 Disclaimers I-2
 Data Interpretation & Reporting Level..... I-2
 Quantitative Techniques & Analytics I-3
 Product Definitions and Scope of Study..... I-3
 IPTV – An Advanced Broadband Service..... I-4
 Equipment/Components/Sub-Systems of IPTV I-5
 Set-top boxes..... I-5
 Access Systems..... I-5
 Video Head-Ends I-5
 VoD Server I-5
 Middleware I-5
 Content Protection/Content Aggregation Systems I-5
 System Integration Devices..... I-5

II. EXECUTIVE SUMMARY

1. Industry Overview II-1

A Rising Global Profile of the IPTV Market II-2
 IPTV Regulations in Major Countries..... II-3
 IPTV Rises Above Web-based Streaming and Cable TV II-3
 IPTV: A Transversal Revolution II-4
 What Lies Ahead?..... II-5
 IPTV and the Promises II-5
 IPTV - Bringing Enduring Transformations II-6
 Self-Care Channels..... II-6
 Cross-Platform Integration II-6
 Content Management II-6
 Back-Office Systems..... II-6
 Others..... II-7
 IPTV - A Multi-Disciplinary Technology II-7
 Why Telcos Need to Adopt IPTV..... II-8
 Telcos Need to Learn Content Management and
 Back Office Functions..... II-8
 Cable Operators Embracing IPTV..... II-9
 Underlying Factors for IPTV Uptake II-9
 Stimulating Factors..... II-9
 Inhibiting Factors..... II-10
 Broadband Network - The Platform for IPTV II-10
 Next Generation TV is Here..... II-10
 High Growth Potential for the Future..... II-10

2. Market Drivers II-11

The Recent Convergence Wave II-11
 Factors Driving Convergence..... II-11
 Tough Market Environment..... II-11
 Changing Customer Behavior and Expectations II-11
 Deregulation and Intense Competition..... II-12
 Technological Advancements..... II-12
 Expanding IP Networks..... II-12
 Market Demand for Data Services..... II-13
 Various Dimensions of Convergence..... II-13

Convergence of Telecommunication Networks..... II-13
 Convergence of Equipment II-13
 Media and Content Convergence..... II-13
 Convergence of Pricing and Tariff Models..... II-13
 Convergence of Services and Applications II-13
 Convergence of Industries II-14
 Other Market Drivers II-14

3. Market Trends & Issues II-15

Consolidation - Order of the Day II-15
 Consolidation in the IPTV Set-Top box Market..... II-15
 Recent Acquisitions in the IPTV/Video Market
 (2006-07)..... II-15
 Bleak Future Ahead for Independent IPTV
 STB Manufacturers..... II-16
 Momentum Rests in Asian and European Markets..... II-16
 Demand for Greater Connectivity Drives the Market..... II-16
 Infrastructure Constraints Before IPTV
 Commercialization..... II-17
 Market Calls for Huge Capital Investment II-17
 Technological Developments to Improve the Services II-17
 Fragmented Market Affects Growth Opportunities II-18
 Legislations to Play Vital Role in Shaping Up of Market..... II-18
 Product Differentiation - A Time Tested Strategy II-18
 IPTV Equipment Market Better Placed than
 Service Sector..... II-19
 Test Vendors Growing through Opportunities..... II-19
 Content on Demand Catalyzes IPTV Growth..... II-19
 Personalized Advertising – To Fetch Substantial
 Revenue..... II-20
 Value-Added Services – A Must to Beat Competition..... II-20
 IPTV Over Satellite - An Emerging Niche Market II-20
 Satellite Technology Displays Potential Opportunities II-21
 Telcos Favoring DSL Network..... II-21
 IPTV over ADSL – An Advanced Option..... II-21
 Integration and Interoperability to Define
 Competitiveness..... II-21
 International VoD Market Expands..... II-22
 Customization of IPTV Services based on the
 User Requirements..... II-22
 Efficient Data Transfer – Another Prominent Issue II-22
 DTT – A Competing and Complementing Technology
 for IPTV II-23
 IPTV-Video Market..... II-23

4. Market Dynamics II-24

Market Participants II-24
 Service Providers II-24
 Telecom Operators II-24
 Worldwide Key IPTV Deployments by Player,
 Region and Platform..... II-25
 Opportunities and Challenges Before Telcos II-26
 Telcos Face Technical Problems II-27
 Cable Network Operators II-27
 Operators – Competing for Market Share II-27
 Broadcasters II-27

CONTENTS

Media & Entertainment Companies	II-28	EPG	II-41
Information Technology (IT) Companies.....	II-28	Information Services.....	II-41
Consumer Electronics Producers.....	II-28	Interactive TV	II-41
Factors Defining IPTV Service Market.....	II-28	Interactive Applications.....	II-42
Telcos and Cable Operators - Enraged Competitors.....	II-28	Broadband Applications.....	II-42
PCCW – The Leader.....	II-29	Important Factors for Offering VoD Services	II-42
<i>Table 1: Leading Players in Global IPTV Services Market</i> <i>(2006): Percentage Share Breakdown by Major Player –</i> <i>PCCW, Free Telecom, France Telecom, Fastweb,</i> <i>Telefonica, and Others (includes corresponding</i> <i>Graph/Chart)</i>	II-30	Client-Server IPTV Middleware Applications	
Positive Outlook for Telecom Carriers.....	II-30	Platform.....	II-42
Challenges Ahead.....	II-30	Effective Service Mix	II-42
Issues to be Addressed.....	II-31	Type of Set-top Box.....	II-42
Vital Factors for Business Success	II-31	Networking Infrastructure.....	II-42
The Right Content	II-31	Video Decoding/Encoding Format.....	II-42
Top Quality Services	II-31	Customer Value Proposition.....	II-43
Convenience & Optimistic User Experience.....	II-31	IPTV Value Proposition.....	II-43
Security.....	II-32	VoD Value Proposition.....	II-43
Economy of Set-top boxes	II-32	Interactive TV Value Proposition	II-43
Cost Control	II-32	Triple-Play Value Proposition.....	II-43
Interactivity	II-33	Home Networking Technologies.....	II-44
Business Model for IPTV	II-33	Physical Layer Technologies	II-44
Role of Business Model.....	II-33	DSL and FTTH – Duo For Deploying IPTV	II-45
Underlying Factors.....	II-33	Video Compression Technologies	II-45
Factors Shaping Right Business Model	II-34	Equipment/Components/Sub-Systems of IPTV	II-45
Types of Business Model.....	II-34	Set-Top Boxes	II-45
Virtual Video Store Model.....	II-34	Access Systems.....	II-45
Enhanced Television Provider (IPTV/VoD) Model.....	II-35	Video Head-Ends.....	II-45
Value-Added Internet Service Provider (VA-ISP)		VoD Server	II-46
Model	II-35	Middleware.....	II-46
Triple-Play Model.....	II-36	Content Protection/Content Aggregation Systems	II-46
Triple-play Business Model.....	II-36	System Integration Devices	II-46
Pricing Models Used by IPTV/VoD Service Providers	II-36	6. End-Use Analysis.....	II-47
Emerging Marketplace for System Providers (OEMs)	II-37	Target Customers	II-47
System Integration and Professional Services.....	II-37	Residential Subscribers.....	II-47
The Emerging Market Scenario.....	II-37	TV-Centric or PC-Centric	II-47
Leading IPTV Vendors in Market by Set-Top Box,		Closed Customer-Base or Open Customer-Base	II-47
Access System, Video Headend, Video-on-demand,		Segment Granularity.....	II-48
Middleware and Content Protection	II-37	Institutional Subscribers.....	II-48
<i>Table 2: Global IPTV Market (2006): Percentage</i> <i>Share of Live IPTV Subscribers Served by IPTV</i> <i>Middleware (includes corresponding</i> <i>Graph/Chart).....</i>	II-38	7. Recent Industry Activity.....	II-49
Test Equipment Suppliers Need to Offer Interoperable		Alcatel-Lucent Takes Over Tamblin	II-49
End-to-End Solutions.....	II-38	Swisscom Acquires Majority Stake in FastWeb.....	II-49
Market Remains Fragmented.....	II-39	Motorola Acquires Tut Systems	II-49
5. Product Overview.....	II-40	Genband Inc Acquires Tekelec Unit.....	II-49
IPTV – An Advanced Broadband Service.....	II-40	Renova Group Acquires Moscow Cable.....	II-49
VoD Offerings.....	II-40	Netifice Communications Acquires Megapath Networks	II-50
IPTV/VoD Service Elements.....	II-41	China Mobile Acquires Phoenix Satellite.....	II-50
TV Service.....	II-41	PingPong Telecom Acquires Vonar Ltda	II-50
VoD	II-41	WaveDivision Holdings Acquires Starstream	
PVR and NPVR.....	II-41	Communications	II-50
		Cordia Corp Acquires Triamis Group	II-50
		Titan Global Acquires Trinity Communications.....	II-50
		Maxwell Acquisition Merges with Redback Networks	II-51
		Sagem, Bit Band and Orca Interactive Collaborate	II-51
		UNE-EPM to Introduce IPTV in Cities of Sincelejo	
		and Monteria	II-51
		Orca Interactive Enters Contract with Lattelecom.....	II-51

CONTENTS

RCom Signs Deal with Microsoft to Introduce IPTV in India.....	II-51	ITonis and Aquos Media Ink Agreement to Introduce IPTV	II-60
Jordan Telecom Signs Agreement with INTRACOM.....	II-51	KermanTel Chooses Nortel IPTV Solution to Launch IPTV Services	II-60
Samsung and KT Partners to Drive IPTV Sales	II-52	Marco Island Chooses Cable IPTV Solution of GoBackTV to Launch IPTV	II-60
Telsur Uses AmiNET110 IPTV STB to Offer IPTV in Chile	II-52	Belgacom Extends IPTV Contract with Nokia Siemens Networks	II-60
Optibase Enters into Alliance with ZTE to Supply Encoder System.....	II-52	Portugal Telecom Selects Ruckus Smart's Wi-Fi for IPTV Service Distribution	II-61
ANTARA Signs Agreement with PT Power Telecom	II-52	Brasil Telecom Selects Widevine Technologies to Secure IPTV Services	II-61
Tilgin Signs Agreement with Ericsson to Offer Set-Top-Boxes.....	II-53	ComX Chooses Widevine for Deployment of IPTV Services in Denmark	II-61
UTStarcom Signs Contract with Bharti Airtel.....	II-53	RCom Enters IPTV Agreement with Microsoft	II-61
AccessKey Signs LOI to Co-Develop Set-Top-Boxes	II-53	Nortel Signs Reseller Agreement with Widevine	II-62
Amedia Signs Licensing Agreement with Motorola	II-53	Inuk Selects Widevine Cypher® to Secure VOD Content	II-62
Private Media Signs Agreement with Belgacom Group	II-53	BSNL-Kolkata Announces Investment Plan for IPTV.....	II-62
UTStarcom Signs Contract with China Telecom to Deploy IPTV Solution	II-54	P&T Luxembourg Chooses Verimatrix's VCAS.....	II-62
Telmex to Invest in IPTV Services.....	II-54	RCN Corp Divests to Astound Broadband	II-63
Alcatel-Lucent Inks Agreement with UAE Telecom Operator.....	II-54	Nokia Siemens Inks IPTV Deployment Contract	II-63
Red Bee Media Inaugurates New Office in Singapore	II-54	Sonaecom Chooses CopperGate for IPTV Deployment in Portuguese Market	II-63
Slovak Telekom Introduces IPTV in Slovakia.....	II-54	T-HT Croatia Opts IP Set-Tops of Scientific Atlanta for IPTV Services	II-63
T-HT Croatia Chooses Scientific Atlanta's New IP Set-Tops	II-55	Sibir Chooses Orca for IPTV Deployment in Russia.....	II-64
IBM to Provide New IPTV Infrastructure Solution	II-55	Comstar-Direct Opts for Tandberg's Encoders for IPTV Network	II-64
SES and Cisco to Introduce IPTV Services in North America	II-55	Nortel Collaborates with NDS for IPTV Services	II-64
BitBand's Technology to Power Synterra's IPTV Services in Russia.....	II-56	UTStarcom Collaborates with Aksh for IPTV Deployment in India.....	II-65
Comverse to Expand Presence in Latin American IPTV Market.....	II-56	Motorola Acquires Modulus Video	II-65
Inuk Partners with Accedo Broadband for Gaming Service.....	II-56	Motorola Joins Microsoft's IQ Lab	II-65
Tiscali Signs Distribution Agreement with RAI for IPTV Services	II-56	ntl, Inc Merges with Telewest Global, Inc.....	II-66
Orange Signs Contract with Disney for IPTV Service.....	II-57	Harmonic Acquires Entone's Video Networking Software Operations	II-66
NSN Bags IPTV Infrastructure Contract in Brazil.....	II-57	Alcatel Acquires Lucent	II-66
Orca Interactive Supplies RiGHTv to ON Telecom	II-57	Motorola Acquires Vertasent.....	II-66
Cable & Wireless Signs Deal with Inuk to Offer IPTV Services in UK	II-57	Infotec Acquires Azatel	II-67
Sumitomo Selects Intellon's Solution for IPTV in Japan.....	II-58	Tiscali and Video Networks Merge.....	II-67
JANET Partners with OSTN to Introduce IPTV in UK Universities.....	II-58	Tandberg Acquires Zetools	II-67
SKY and FASTWEB Enter into an Agreement.....	II-58	Cisco Acquires Scientific-Atlanta	II-67
Envivio Bags Orders to Deliver 200 Channels to Tier 1 Telcos.....	II-58	Command Information Acquires AnviCom.....	II-67
Walt Disney and FASTWEB Sign VoD Deal to Offer Disney Channels in Italy	II-59	VisionGateway Inc Acquires Centile Subsidiary	II-68
Anevia Enters into Partnership with Ihsan to Deliver IPTV Solutions.....	II-59	Carlyle Group Acquires Eastern Multimedia.....	II-68
Bharti Airtel Chooses IPTV Encoding Platforms of Optibase	II-59	Boston Ventures Acquires En-Touch Systems	II-68
Channel 4 Finland and Disney-ABC Enter into Agreement	II-59	Viacom Inc Acquires H&Q Asia Pacific	II-68
Exterity and SpliceCom Enter into Joint Development Agreement	II-60	3Com Corp Acquires Huawei 3Com Technology	II-68
		Filtakleen Inc Acquires Interactive Television	II-68
		Wave2Wave Acquires IntelliSpace	II-68
		Orca Inks Deal with NGN	II-69
		Eurocom Plovdiv Merges with Warburg Pincus.....	II-69
		Orca Enters Alliance with Ruckus Wireless	II-69
		Orca Interactive Enters Deal with Sonaecom	II-69
		Amino Signs Agreement with SES AMERICOM	II-69
		Orca Interactive and Telrad Networks Enter Partnership.....	II-70

CONTENTS

Eagle Signs Agreement with Terremark to Deliver IPTV Content.....	II-70	Digital Focus Divests Business to Command Information ...	II-79
UTStarcom Inks Contract with China Netcom for IPTV Solution	II-70	SaskTel Expands MAX IP TV Services	II-79
UTStarcom Inks Contract with China Telecom for IPTV Solution	II-70	ONO Takes Over Auna	II-79
Orca Interactive Provides IPTV Middleware to Jazztel.....	II-70	ECI Acquires Laurel Networks	II-80
BT Closes Three Deals to Provide IPTV Services.....	II-71	Canal Digital Opts for BitBand VoD Solutions for Deploying IPTV Service	II-80
BellSouth Enters into Agreement with SES for IP-PRIME™ Trial.....	II-71	Telecom Operators in Europe Select SkyStream’s Digital TV and Music	II-80
Alcatel and Microsoft Enter into Agreement with HP.....	II-71	Oregan Networks Signs Partnership Agreement with Orca Interactive.....	II-80
East Telecom Launches IPTV Network Trial in Tashkent	II-71	SBC Selects Motorola and Scientific-Atlanta for Supplying STBs	II-81
Konka Signs Agreement with Texas Instruments.....	II-71	BT Group Signs Deal for IPTV Service Content	II-81
San Ramon and AT&T to Sign Agreement for IPTV	II-72	Chunghwa Telecom Enters into Agreement with Alcatel.....	II-81
Juniper Signs Agreement with Microsoft	II-72	Tut Systems Partners with CETC-iPTV	II-81
Alcatel and Microsoft Join Forces with IBM to Offer Server Solutions	II-72	Pixelworks Acquires Equator Technologies	II-82
Widevine Technologies and Anytime Enter into Partnership.....	II-72	Cisco Acquires Scientific-Atlanta	II-82
SureWest Selects Widevine for Protection of Largest IPTV Deployments.....	II-73	SBC Takes Over AT&T	II-82
Lattelecom Selects Widevine for HD MPEG-4 IPTV Deployment	II-73	British Telecom’s IPTV Services to use Microsoft TV Software Platform.....	II-82
Sonaeocom Selects Widevine for IPTV Deployment	II-73	PLD Selects Entone’s VOD	II-83
Atlas Telecom Signs Contract with ECI Telecom	II-73	PCCW Enters into an Agreement with Juniper Networks Inc.....	II-83
Consolidated Communications Selects Entone’s Hydra HD IP Video Gateway	II-74	Coaxsys Gains an Order from NTS Communications for Home IPTV Services.....	II-83
CEOS Selects Entone and Minerva Products for IPTV Installations.....	II-74	ZTE, Huawei and UTStarcom Win IPTV Contracts.....	II-83
Tut Systems strikes a Deal with CP-Tel Networks.....	II-74	Guangdong Telecom Endorses Three Contracts to Build IPTV Networks	II-84
Siemens Inks an Agreement with Widevine Technologies.....	II-74	China Telecom and Shanghai Media Group Enter into a Joint Venture.....	II-84
TANDBERG Television Signs Agreement to Acquire SkyStream.....	II-75	Scientific-Atlanta Teams up Microsoft for Developing IPTV Set-Top Boxes.....	II-84
Opera Software and Amino Extend Partnership Terms.....	II-75	Chunghwa Telecom Acquires Licenses from Orca Interactive	II-84
Eagle Broadband Inks an Agreement with The Sportsman Channel.....	II-75	Microsoft Enters into a Collaboration with Harmonic.....	II-84
Verimatrix and Entone to Integrate their Proprietary Technologies.....	II-76	Thomson Acquires Thales Broadcast & Multimedia.....	II-85
Guest-Tek Interactive Entertainment Chooses AmiNET110H Set-Top Box of Amino	II-76	3G Dynasty Inc Inks Partnership with China Telecom.....	II-85
Motorola Acquires KreateL Communications.....	II-76	CoConnect Enters into an Agreement with Envivio	II-86
Deutsche Telekom Signs an Agreement with Microsoft Corp	II-77	Eagle Broadband Signs a Multi-Year Agreement with GlobeCast	II-86
Magicweb Endorses a Licensing Agreement with Venture Net Capital Group	II-77	Verizon Communications Acquires MCI Corp.....	II-87
mPhase Technologies Signs Agreement With Espial.....	II-77	Sprint Merges its Operations with Nextel to Form Sprint-Nextel	II-87
Auroras Entertainment Enters into Agreement with Wegener Corporation.....	II-78	Alcatel Enters into Agreement with Swisscom to Supply VDSL Equipment	II-87
Optical Entertainment Network Ink Agreements with Starz Entertainment	II-78	Alcatel Enters into Agreement with Microsoft for IPTV Development.....	II-87
PCCW Joins Forces with STAR.....	II-78	Amino Wins a Contract from GSB.....	II-88
CASCADE Completes IPTV Installation for True Digital	II-78	Siemens Integrates Entone IPTV Set-Top into SURPASS Portfolio.....	II-88
Telecom Italia Commences Trials of First Dedicated IPTV in Italy.....	II-79	Interactive Television Enters into a Licensing Agreement with Academy Entertainment	II-89
		TechnoConcepts Signs Licensing Agreement with Shanghai Jinshilin Technologies.....	II-89
		Siemens Acquires Myrio	II-89
		Microsoft Collaborates with Sigma to Introduce System-on-Chip Technology	II-89

CONTENTS

Envivio and Sigma Team Up to Enhance AVC/H.264 IPTV Deployments	II-90	Goldstone Introduces IPTV Services in Thailand and Malaysia	II-100
Shanghai Telecom and SMG Tie Up with Siemens to Offer IPTV Services	II-90	IBM and Cisco Soft Launch IPTV.....	II-100
Pacific Century Signs Alliance with Entone IPTV Products	II-91	North Central to Launch IPTV Service.....	II-100
Starwin Endorses an Agreement with Kun Shan ZhongXu.....	II-91	Time Warner Launches BusinessLink.tv	II-100
Belgacom Adopts Siemens® SURPASS® Home Entertainment Technology.....	II-91	Vestitel BG Launches IPTV Service	II-100
Amino Bags a Supply Contract from TotalVision.....	II-91	Portugal Telecom Selects Harmonic’s Digital Video Headend	II-101
Advanced Digital Broadcast Gains Order from Telefonica.....	II-92	Magnet Entertainment Adds New Sky Channels.....	II-101
SBC Selects Scientific-Atlanta for IP-based Video Equipment.....	II-92	KT to Introduce IPTV in South Korea.....	II-101
Intel Signs MoU with Shanghai Media Group	II-92	Tiscali to Launch IPTV in the UK.....	II-101
Lucent Technologies Partners with Orca Interactive	II-93	Nsight Telservices to Roll Out IPTV	II-102
Dansk Bredband Enters Contract with Major IPTV Providers.....	II-93	Bharti Airtel to Roll Out IPTV Service in India	II-102
SES Inks IPTV Distribution Deal with TV Programmers and Networks.....	II-94	PTCL to Introduce IPTV Service in Pakistan	II-102
Etisalat Chooses Viaccess’ VZ ON for Providing Secure Content.....	II-94	IOL Broadband to Introduce IPTV Service in 28 Indian Cities.....	II-102
Telecom Italia Forms Joint Venture with Microsoft.....	II-94	Accedo Broadband Unveils Multiplayer Gaming Solution for IPTV	II-102
mPhase Technologies Enters into Alliance with Beyaz Holding Company.....	II-94	Deutsche Telekom Introduces IPTV over ADSL2+ Network	II-102
Alcatel, Acer and Ambit Bag a Contract from Chunghwa Telecom Co Ltd.....	II-95	De Volkskrant to Roll Out IPTV Service	II-103
SBC Communications Inc. Enters into Agreement with Microsoft Corp.	II-95	hanarotelecom Introduces Broadcast IPTV.....	II-103
SBC Signs an Agreement with Alcatel and Microsoft.....	II-95	MTNL and Aksh Optifibre Launch IPTV.....	II-103
Amino Communications Establishes a New Subsidiary in the US.....	II-95	PCCW to Unveil High-Definition Broadcasts for IPTV Services.....	II-103
Opera Software Signs an Agreement with Plat’C2	II-96	Sierre Energie Launches FTTH IPTV Service in Switzerland	II-103
8. Product/Service Introductions	II-97	ShiftV Launches IPTV Service	II-103
Harmonic Develops VoD Solution for SES’s IPTV Service.....	II-97	TDC Launches Commercial IPTV Service.....	II-104
Consolidated Telecom Chooses Latens’ FCAS for IPTV Service.....	II-97	VOLNY Unveils VOLNY TV in Czech Republic	II-104
Brazil Telecom Introduces IPTV Services in Brasilia	II-97	Zattoo Introduces P2P IPTV Service in Spain	II-104
Cantv to Launch IPTV Services.....	II-97	Envivio Launches Multi-channel IP Video Encoder.....	II-104
Goldstone to Launch IPTV Service.....	II-97	Envivio to Unveil Multi-channel IP Encoder.....	II-105
HFCL Infotel Introduces IPTV Services in Chandigarh and Punjab	II-98	Envivio Launches 4Stream IP Gateway	II-105
Korea Telecom to Launch IPTV in Russia.....	II-98	France Telecom Introduces Orange Sports TV.....	II-105
Netcom Introduces IPTV in Dalian	II-98	Motorola Unveils Open IP Set-Top Software Platform, KreaTV	II-105
Optibase to Unveil New IPTV Products.....	II-98	Microsoft Unveils Mediaroom	II-106
SingTel Launches IPTV Services.....	II-98	Orange Rolls Out IPTV Services.....	II-106
T-Com Montenegro to Launch IPTV Service	II-98	KT and Sony to Introduce IPTV Service for PlayStation 3.....	II-106
Ya.com Rolls Out New IPTV Service	II-99	Bharti Airtel to Introduce IPTV Service in India	II-106
Arcor to Unveil IPTV Services in Germany	II-99	BSNL Introduces IPTV Services in Several Indian Cities.....	II-106
BSNL to Launch IPTV Services in Andhra Pradesh	II-99	GVT to Introduce Data Center and IPTV Services	II-106
CenturyTel and Mountain to Launch IPTV Services	II-99	Microsoft and Reliance Join Forces to Introduce IPTV	II-107
Dalsvyaz Launches IPTV in Far East Russia	II-99	Oi Plans to Rollout IPTV Services in 2008.....	II-107
EchoStar Launches Wholesale IPTV Service	II-100	GekTV Selects DINASTech Solution	II-107
		Orca Interactive and Blockbuster Israel Introduce IPTV and Web TV Technology.....	II-107
		Bayantel to Introduce IPTV Services.....	II-107
		TDC Launches IPTV in Denmark	II-108
		FastTV Inks IPTV Agreement with Teracom.....	II-108
		Corvette Telecom to Launch IPTV Service	II-108
		UTStarcom Launches New IPTV Set-Top Boxes with Tzero.....	II-108
		Jiangsu Telecom Powers IPTV with E320 Broadband Service Routers.....	II-108

CONTENTS

Aggregato and MercuryMedia Join Hands to Launch IPTV	II-109	Auroras Join Forces with Verimatrix for Encryption and Content Security	II-119
Tut Systems Introduces IPTV Head-End with Smart City	II-109	Broadstream Selects Intelsat-Americas to Deploy IPTVConnect Service	II-119
Swisscom Introduces IPTV	II-109	Brix Unveils New IPTV Service Assurance Portfolio	II-119
Czech On Line Introduces IPTV	II-109	iPTV Americas Launches MPEG-4 IPTV Service	II-119
ETB Launches IPTV Services	II-109	hanarotelecom Launches hanaTV	II-120
Inlet Technologies Unveils Spinnaker	II-109	KyLinTV Launches Chinese IPTV Service	II-120
MTNL Rolls out IPTV	II-110	Telefonica O2 Czech Republic Introduces IPTV Pilot Operation	II-120
MTG to Launch IPTV Service in Denmark	II-110	Ericsson Introduces End-to-End IPTV Solution	II-120
Portugal Telecom Launches IPTV	II-110	True IPTV Beams Playhouse Disney Channel and Disney Channel in Thai	II-121
Sunrise Rolls Out IPTV Service	II-110	Alcatel, Microsoft and IBM Tie Up for IPTV Server Solutions	II-121
T-Online Introduces IPTV services	II-110	BroadRelay Introduces BroadRelay IPTV Station Manager™	II-121
TT&T Introduces Online Television Service	II-110	Cavalier Telephone Introduces First MPEG-4 AVC enabled IPTV Services	II-121
Wind and Tiscali Unveils IPTV Services	II-111	Viaccess Adds New Product to IPTV Range	II-121
Club Internet Launches Digital Television Service	II-111	Envivio Introduces Triple-Play Solution	II-122
Entone Launches New Range of HD CPE Products	II-111	France Telecom Launches High Definition TV over IP	II-122
Verizon Launches FiOS TV	II-111	Sagem and France Telecom Introduce High Definition Set-Top Boxes	II-122
Aelefonica Launches IPTV Service in Argentina	II-112	Orca Launches RiGHTv 4.5	II-122
BT Vision Launches IPTV Services and Set-top Box	II-112	Interactive Television Networks Inc and NLL to Launch LacrosseTV	II-122
AT&T Introduces IPTV Service in Houston	II-112	Terayon Introduces Interactive Ad Program	II-123
Inuk Launches Freewire Multicast IPTV Service	II-112	Amdocs Introduces IP Convergence Solutions for IPTV	II-123
Auroras Adds Evo IPTV Service of Espial to its Suite of IPTV Services	II-112	GDB Limited Introduces IPTV Services ‘Tvbrighton’	II-123
Auroras Adds Fox News Channel, Playboy TV and Starz Entertainment	II-113	Hammerhead Introduces New Ethernet Features for HSX 6000 Platform	II-123
Playout247 Launches IPTV Solutions for Operators	II-113	Belgacom Introduces IPTV Service	II-123
Archer Introduces Two IPTV Channels in China	II-113	Motorola Unveils New IPTV Solutions	II-124
Kasenna Launches PortalTV 2.0	II-113	AT&T Launches IPTV Services in San Antonio	II-124
mPhase Launches New Generation IPTV Software	II-114	Optical Entertainment Network to Introduce Largest FTTH IPTV in US	II-124
Pixelmetrix Launches DVStorIP-Gen	II-114	Cisco Launches MTV’s Streaming Network, mtvU Uber	II-124
SES Integrates Video Encryption Technology with IPTV Distribution Service	II-114	Telecom Italia Initiates IPTV Operations in Italy	II-125
T-Com Rolls Out T-Home Triple Play Service	II-114	Terayon Introduces First ‘Telco-Optimized’ Solution	II-125
Amino Incorporates the Firefox Browser	II-115	Path 1 Network Technologies Launches New Suite of Intelligent Hardware and Software	II-125
Shanghai Telecom Introduces IPTV	II-115	New Medium Enterprises Signs an Agreement with Global MediaCast	II-126
Telekom Austria Launches IPTV	II-115	Marconi Federal Unveils IPTV Solution and ViPr Media Center	II-126
UTStarcom Introduces RollingStream	II-115	Terayon Launches Ad Insertion Solution for Telco IPTV Services	II-127
Zarlink Launches ClassSwitch Platform	II-115	Media Excel Introduces Real-Time Transcoder, HERA 3000	II-127
TAR Launches IPTV Service	II-116	Amino Communications Launches IPTV Set-top Box	II-127
CenterTelecom Introduces Commercial IPTV	II-116	NS8 Launches New Content Distribution Management Solution for IPTV	II-128
BT to Offer Next Generation IPTV Services	II-116		
Cesky Telecom to Introduce IPTV Services	II-116		
Deutsche Telekom Introduces IPTV Broadcast Services	II-116		
Eesti Telecom to Introduce IPTV	II-116		
KPN Introduces IPTV Services	II-117		
Microsoft Partners with Alcatel to Introduce IPTV Services in Brazil	II-117		
Shanda Introduces IPTV Products in Southwestern China	II-117		
Wanadoo Spain Introduces IPTV Services	II-117		
Nortel Joins Forces with Broadstream to Offer IPTV Services	II-117		
Auroras Signs Content Agreement with New Programming Partners	II-118		
Auroras Launches First Consumer Field Trial in Montana	II-118		
Telkonet, NuVisions Introduces IPTV Services to Beta Consumers	II-118		
		9. Focus on Select Global Players	II-129
		Key IPTV Carriers/Operators	II-129
		AT&T Inc (USA)	II-129
		Belgacom (Belgium)	II-129

CONTENTS

Bell Canada Enterprise Inc (Canada).....	II-129		
British Telecom (UK).....	II-129		
China Telecom Corporation Ltd (China).....	II-130		
Comcast Corporation (USA).....	II-130		
Deutsche Telekom AG (Germany).....	II-130		
FastWeb TV (Italy).....	II-131		
France Telecom SA (France).....	II-131		
PCCW Limited (Hong Kong).....	II-131		
Qwest Communications International Inc. (USA).....	II-131		
Telecom Italia SpA (Italy).....	II-132		
Verizon Communications Inc (USA).....	II-132		
Key IPTV Vendors/System Providers.....	II-132		
Alcatel-Lucent SA (France).....	II-132		
Cisco Systems Inc (USA).....	II-133		
ECI Telecom Ltd (Israel).....	II-133		
Entone Inc (USA).....	II-133		
Envivio Inc (USA).....	II-133		
Microsoft Corporation (USA).....	II-134		
Motorola Inc. (USA).....	II-134		
NEC Corporation (Japan).....	II-134		
Orca Interactive Ltd. (Israel).....	II-135		
Sprint Nextel Corporation (USA).....	II-135		
Widevine Technologies, Inc. (USA).....	II-135		
Viaccess S.A. (France).....	II-136		
10. Global Market Perspective.....	II-137		
<i>Table 3: World Current and Future Analysis for IPTV by Geographic Region – US, Canada, Europe, Asia-Pacific (including Japan) and Rest of World Independently Analyzed by Number of Subscribers in Million for the Years 2004 to 2014 (includes corresponding Graph/Chart).....</i>			
	II-137		
<i>Table 4: World 10-Year Perspective for IPTV by Geographic Region – Percentage Breakdown of Number of Subscribers for US, Canada, Europe, Asia-Pacific (including Japan) and Rest of World for the Years 2004, 2009 and 2014 (includes corresponding Graph/Chart).....</i>			
	II-138		
<i>Table 5: World Current and Future Analysis for IPTV by Geographic Region – US, Canada, Europe, Asia-Pacific (including Japan) and Rest of World Independently Analyzed by Annual Service Revenues in US\$ Million for the Years 2004 to 2014 (includes corresponding Graph/Chart).....</i>			
	II-139		
<i>Table 6: World 10-Year Perspective for IPTV by Geographic Region – Percentage Breakdown of Service Revenues for US, Canada, Europe, Asia-Pacific (including Japan) and Rest of World for the Years 2004, 2009 and 2014 (includes corresponding Graph/Chart).....</i>			
	II-140		
<i>Table 7: World Current and Future Analysis for IPTV by System – Set-Top Boxes, Access Systems, Video Headend Equipment, Video-on-Demand, Middleware, Content Protection and System Integration Independently Analyzed by Annual Sales in US\$ Million for the Years 2004 to 2014 (includes corresponding Graph/Chart).....</i>			
	II-141		
<i>Table 8: World 10-Year Perspective for IPTV by System – Percentage Breakdown of Dollar Sales for Set-Top Boxes, Access Systems, Video Headend Equipment, Video-on-Demand, Middleware, Content Protection and System Integration for the Years 2004, 2009 and 2014 (includes corresponding Graph/Chart).....</i>			
	II-142		
III. MARKET			
1. The United States.....	III-1		
A. Market Analysis.....	III-1		
Outlook.....	III-1		
US IPTV Market – Optimism Rules.....	III-1		
Market Trends.....	III-2		
New IPTV Regulation in Texas Opens Growth Avenues.....	III-2		
Satellite Operators - Sensing the Opportunity.....	III-2		
iPTV in Rural Areas - A Secured Niche Market for Satellite Operators.....	III-2		
Biggies Lagging.....	III-2		
Market Overview.....	III-3		
Pay TV Market.....	III-3		
Regulations.....	III-3		
ARPU.....	III-4		
Competitive Structure.....	III-4		
Cable Operators Vs Telco.....	III-4		
Product/Service Launches.....	III-5		
Strategic Corporate Developments.....	III-13		
Key IPTV Carriers/Operators in the US.....	III-29		
AT&T Inc.....	III-29		
Comcast.....	III-29		
Qwest Communications International Inc.....	III-29		
Verizon Communications Inc.....	III-29		
Key IPTV Vendors/System Providers in the US.....	III-29		
Cisco Systems Inc.....	III-29		
Entone Inc.....	III-30		
Envivio Inc.....	III-30		
Microsoft Corporation.....	III-30		
Motorola Inc.....	III-30		
Sprint Nextel Corporation.....	III-31		
Widevine Technologies, Inc.....	III-31		
B. Market Analytics.....	III-32		
<i>Table 9: US Current and Future Analysis for IPTV by Number of Subscribers in Million for the Years 2004 through 2014 (includes corresponding Graph/Chart)....</i>			
	III-32		
<i>Table 10: US Current and Future Analysis for IPTV by Annual Service Revenues in US\$ Million for the Years 2004 through 2014 (includes corresponding Graph/Chart).....</i>			
	III-32		
2. Canada.....	III-33		
A. Market Analysis.....	III-33		
Outlook.....	III-33		
Market Overview.....	III-33		
Regulations.....	III-33		
ARPU.....	III-34		

CONTENTS

Competitive Structure	III-34	Major European IPTV Services, Base Country, Concerned Network Operator and Network Platform.....	III-44
Canadian Telecom Market.....	III-34	Strategic Corporate Development.....	III-45
Product/Service Launch	III-34	B. Market Analytics	III-46
Strategic Development	III-34	<i>Table 16: European Current and Future Analysis for IPTV by Geographic Region – France, Germany, UK, Italy, Spain, Russia and Rest of Europe Independently Analyzed by Annual Number of Subscribers in Million for the Years 2004 to 2014 (includes corresponding Graph/Chart).....</i>	III-46
Bell Canada – A Key Canadian IPTV Carrier/Operator.....	III-35	<i>Table 17: European 10-Year Perspective for IPTV by Geographic Region – Percentage Breakdown of Number of Subscribers for France, Germany, UK, Italy, Spain, Russia and Rest of Europe for the Years 2004, 2009 and 2014 (includes corresponding Graph/Chart).....</i>	III-46
B. Market Analytics	III-35	<i>Table 18: European Current and Future Analysis for IPTV by Geographic Region – France, Germany, UK, Italy, Spain, Russia and Rest of Europe Independently Analyzed by Annual Service Revenues in US\$ Million for the Years 2004 to 2014 (includes corresponding Graph/Chart).....</i>	III-47
<i>Table 11: Canadian Current and Future Analysis for IPTV by Number of Subscribers in Million for the Years 2004 through 2014 (includes corresponding Graph/Chart).....</i>	III-35	<i>Table 19: European 10-Year Perspective for IPTV by Geographic Region – Percentage Breakdown of Service Revenues for France, Germany, UK, Italy, Spain, Russia and Rest of Europe for the Years 2004, 2009 and 2014 (includes corresponding Graph/Chart)</i>	III-48
<i>Table 12: Canadian Current and Future Analysis for IPTV by Annual Service Revenues in US\$ Million for the Years 2004 through 2014 (includes corresponding Graph/Chart).....</i>	III-36	3a. France	III-49
3. Europe	III-37	A. Market Analysis	III-49
A. Market Analysis	III-37	Outlook	III-49
Outlook	III-37	Market Overview.....	III-49
Market Overview	III-37	iPTV Market Continues to Expand	III-49
Current IPTV Offers in Europe.....	III-38	Pay TV Market	III-49
European IPTV Launches in 2006-07	III-38	iPTV Market	III-50
Broadband Market in Europe.....	III-39	ARPU	III-50
Ambiguous Regulatory Model for Audiovisual Media	III-39	Regulations.....	III-50
<i>Table 13: European TV Market in 2004: Percentage Share of Total European Homes with TV for Germany, UK, France, Italy and Others (includes corresponding Graph/Chart)</i>	III-39	Competitive Structure.....	III-50
<i>Table 14: European TV Market in 2004: Percentage Share of Total European Homes with Digital Pay TV for UK, France, Germany, Italy, Spain and Others (includes corresponding Graph/Chart).....</i>	III-40	Product/Service Launches	III-51
Pay TV Market in Europe.....	III-40	Key French IPTV Carrier/Operator	III-52
<i>Table 15: European Market for IPTV (2006): Percentage Share Breakdown of IPTV penetration of Pay TV Households by Region – Belgium, France, Italy, Netherlands, Norway, Slovenia, Spain, Sweden, UK, and Others (includes corresponding Graph/Chart).....</i>	III-41	France Telecom SA.....	III-52
iPTV Market	III-42	Key French PTV Vendors/System Providers.....	III-52
Market Drivers	III-42	Alcatel-Lucent SA	III-52
Internet Access and IP-Based Services	III-42	Viaccess S.A.	III-52
Digital Television	III-42	B. Market Analytics	III-53
DSL Subscription	III-42	<i>Table 20: French Current and Future Analysis for IPTV by Number of Subscribers in Million for the Years 2004 through 2014 (includes corresponding Graph/Chart).....</i>	III-53
Issues and Trends.....	III-43	<i>Table 21: French Current and Future Analysis for IPTV by Annual Service Revenues in US\$ Million for the Years 2004 through 2014 (includes corresponding Graph/Chart).....</i>	III-53
Regional Differences – An Imperative Influencing Factor	III-43		
Deregulation of Telecom Operations	III-43		
Market Participants	III-43		
Leading Incumbents in European Market and Contents Available through IPTV or Other TV Services Offered by the Operator	III-44		

CONTENTS

3b. Germany	III-54	Product/Service Launches	III-68
A. Market Analysis	III-54	Strategic Corporate Developments	III-68
Outlook	III-54	Key Italian IPTV Carriers/Operators	III-70
Market Overview	III-54	FastWeb TV	III-70
Position of Cable and Satellite Operators	III-55	Telecom Italia	III-70
APRU	III-55	B. Market Analytics	III-71
Regulations	III-55	<i>Table 26: Italian Current and Future Analysis for</i>	
Competitive Structure	III-55	<i>iPTV by Number of Subscribers in Million for the</i>	
IPTV Providers in Germany (2006)	III-55	<i>Years 2004 through 2014 (includes corresponding</i>	
Product/Service Launches	III-55	<i>Graph/Chart)</i>	III-71
Strategic Corporate Development	III-56	<i>Table 27: Italian Current and Future Analysis for</i>	
Key German IPTV Carrier/Operator	III-56	<i>iPTV by Annual Service Revenues in US\$ Million</i>	
Deutsche Telekom AG	III-56	<i>for the Years 2004 through 2014 (includes</i>	
B. Market Analytics	III-57	<i>corresponding Graph/Chart)</i>	III-71
<i>Table 22: German Current and Future Analysis for</i>			
<i>iPTV by Number of Subscribers in Million for the</i>			
<i>Years 2004 through 2014 (includes corresponding</i>			
<i>Graph/Chart)</i>	III-57		
<i>Table 23: German Current and Future Analysis for</i>			
<i>iPTV by Annual Service Revenues in US\$ Million</i>			
<i>for the Years 2004 through 2014 (includes</i>			
<i>corresponding Graph/Chart)</i>	III-57		
3c. The United Kingdom	III-58	3e. Spain	III-72
A. Market Analytics	III-58	A. Market Analysis	III-72
Outlook	III-58	Outlook	III-72
UK: Picking Up Pace	III-58	Spanish IPTV Market Holds Immense Growth	
Market Overview	III-58	Potential	III-72
Regulations	III-58	Market Overview	III-72
ARPU	III-59	Pay TV Market	III-72
Competitive Structure	III-59	Spain - Luring Opportunities for IPTV	III-73
Product/Service Launches	III-59	Regulations	III-73
Strategic Corporate Developments	III-61	ARPU	III-73
Key IPTV Carrier/Operator in the UK	III-65	Competitive Structure	III-73
British Telecom	III-65	Product/Service Launches	III-74
B. Market Analytics	III-66	Strategic Corporate Development	III-75
<i>Table 24: UK Current and Future Analysis for IPTV</i>		B. Market Analytics	III-75
<i>by Number of Subscribers in Million for the Years</i>		<i>Table 28: Spanish Current and Future Analysis for</i>	
<i>2004 through 2014 (includes corresponding</i>		<i>iPTV by Number of Subscribers in Million for the</i>	
<i>Graph/Chart)</i>	III-66	<i>Years 2004 through 2014 (includes corresponding</i>	
<i>Table 25: UK Current and Future Analysis for</i>		<i>Graph/Chart)</i>	III-75
<i>iPTV by Annual Service Revenues in US\$ Million</i>		<i>Table 29: Spanish Current and Future Analysis for</i>	
<i>for the Years 2004 through 2014 (includes</i>		<i>iPTV by Annual Service Revenues in US\$ Million</i>	
<i>corresponding Graph/Chart)</i>	III-66	<i>for the Years 2004 through 2014 (includes</i>	
		<i>corresponding Graph/Chart)</i>	III-76
3d. Italy	III-67	3f. Russia	III-77
A. Market Analysis	III-67	A. Market Analysis	III-77
Outlook	III-67	Outlook	III-77
Market Overview	III-67	Market Overview	III-77
Pay TV Market	III-67	Product/Service Launches	III-78
Regulations	III-67	Strategic Corporate Development	III-78
ARPU	III-67	B. Market Analytics	III-80
Competitive Structure	III-67	<i>Table 30: Russian Current and Future Analysis for</i>	
		<i>iPTV by Number of Subscribers in Million for the</i>	
		<i>Years 2004 through 2014 (includes corresponding</i>	
		<i>Graph/Chart)</i>	III-80
		<i>Table 31: Russian Current and Future Analysis for</i>	
		<i>iPTV by Annual Service Revenues in US\$ Million</i>	
		<i>for the Years 2004 through 2014 (includes</i>	
		<i>corresponding Graph/Chart)</i>	III-80

CONTENTS

3g. Rest of Europe	III-81	4a. China	III-95
A. Market Analysis	III-81	A. Market Analysis	III-95
Outlook.....	III-81	Outlook.....	III-95
Market Overview.....	III-81	Market Overview.....	III-95
Sweden - Huge Opportunities for IPTV.....	III-81	China – An Emerging Market.....	III-95
Competitive Scenario.....	III-81	Immense Potential Lies Ahead.....	III-95
<i>Table 32: Swedish Broadband Market (2006):</i> <i>Percentage Share Breakdown of Major Players -</i> <i>ComHem, TDC Song, Tele2, Telenor, Telia,</i> <i>and Others (includes corresponding</i> <i>Graph/Chart)</i>	III-81	Trouble in Paradise.....	III-96
Strategic Corporate Developments.....	III-82	<i>Table 39: Chinese Market for IPTV (2006):</i> <i>Percentage Share Breakdown of IPTV User</i> <i>Preferences by Type – VoD, Live TV Broadcast,</i> <i>and Time-shifted TV (includes corresponding</i> <i>Graph/Chart)</i>	III-96
Product/Service Launches.....	III-86	<i>Table 40: Chinese Market for IPTV (2007):</i> <i>Percentage Share Breakdown of IPTV Users</i> <i>in Select Major Provinces – Beijing, Guangdong,</i> <i>Hebei, Heilongjiang, Henan, Jiangsu, Shanghai,</i> <i>Xinjiang, and Yunnan (includes corresponding</i> <i>Graph/Chart)</i>	III-97
Key IPTV Carrier/Operator in Rest of Europe.....	III-89	<i>Table 41: Chinese Market for IPTV (2007):</i> <i>Percentage Share Breakdown of IPTV</i> <i>Subscribers in Shanghai by Consumer–</i> <i>Existing Broadband users loading IPTV,</i> <i>New Broadband users loading IPTV ,</i> <i>New IPTV Customers (includes</i> <i>corresponding Graph/Chart)</i>	III-97
Belgacom (Belgium).....	III-89	Chinese TV Industry - An Introduction.....	III-97
B. Market Analytics	III-89	Regulatory Framework.....	III-98
<i>Table 33: Rest of Europe Current and Future Analysis</i> <i>for IPTV by Number of Subscribers in Million for</i> <i>the Years 2004 through 2014 (includes</i> <i>corresponding Graph/Chart)</i>	III-89	SARFT Favors Digital TV.....	III-98
<i>Table 34: Rest of Europe Current and Future Analysis</i> <i>for IPTV by Annual Service Revenues in US\$ Million</i> <i>for the Years 2004 through 2014 (includes</i> <i>corresponding Graph/Chart)</i>	III-90	A Peek into the Broadband Market.....	III-99
4. Asia-Pacific	III-91	IPTV Market.....	III-100
A. Market Analysis	III-91	Market Trends.....	III-100
Outlook.....	III-91	Conformist Regulations Hindering IPTV.....	III-100
Market Overview.....	III-91	2008 Olympics – Nurturing IPTV Market.....	III-100
Pay TV Market.....	III-91	IPTV- A Young Market.....	III-101
IPTV to Grow at an Unprecedented Rate.....	III-92	Chinese IPTV Market in Nutshell.....	III-101
Leading Markets and IPTV Providers in the Region.....	III-92	Challenges Before IPTV.....	III-102
B. Market Analytics	III-93	Competitive Structure.....	III-103
<i>Table 35: Asia-Pacific Current and Future Analysis</i> <i>for IPTV by Geographic Region – China and</i> <i>Rest of Asia-Pacific Independently Analyzed by</i> <i>Annual Number of Subscribers in Million for the</i> <i>Years 2004 to 2014 (includes corresponding</i> <i>Graph/Chart)</i>	III-93	IPTV Solutions of Major Chinese Suppliers.....	III-104
<i>Table 36: Asia-Pacific 10-Year Perspective for IPTV</i> <i>by Geographic Region – Percentage Breakdown</i> <i>of Number of Subscribers for China and Rest of</i> <i>Asia-Pacific for the Years 2004, 2009 and 2014</i>	III-93	China to Outdo Hong Kong.....	III-104
<i>Table 37: Asia-Pacific Current and Future Analysis for</i> <i>iPTV by Geographic Region – China and Rest of</i> <i>Asia-Pacific Independently Analyzed by Annual Service</i> <i>Revenues in US\$ Million for the Years 2004 to 2014</i> <i>(includes corresponding Graph/Chart)</i>	III-94	Product/Service Launches.....	III-104
<i>Table 38: Asia-Pacific 10-Year Perspective for IPTV</i> <i>by Geographic Region – Percentage Breakdown of</i> <i>Service Revenues for China and Rest of Asia-Pacific</i> <i>for the Years 2004, 2009 and 2014</i>	III-94	Strategic Corporate Developments.....	III-105
		Key Chinese IPTV Carrier/Operator.....	III-109
		China Telecom Corporation.....	III-109
		B. Market Analytics	III-109
		<i>Table 42: Chinese Current and Future Analysis for</i> <i>iPTV by Number of Subscribers in Million for the</i> <i>Years 2004 through 2014 (includes corresponding</i> <i>Graph/Chart)</i>	III-109
		<i>Table 43: Chinese Current and Future Analysis for</i> <i>iPTV by Annual Service Revenues in US\$ Million</i> <i>for the Years 2004 through 2014 (includes</i> <i>corresponding Graph/Chart)</i>	III-110

CONTENTS

4b. Rest of Asia-Pacific	III-111	Product/Service Launches	III-117
A. Market Analysis	III-111	Strategic Corporate Developments	III-121
Outlook	III-111	Key IPTV Carrier/Operator in Rest of Asia-Pacific...	III-125
Market Overview	III-111	PCCW Limited (Hong Kong)	III-125
Leading Markets.....	III-111	Key IPTV Vendor/System Provider in	
Hong Kong.....	III-111	Rest of Asia-Pacific	III-125
A Mature Market.....	III-111	NEC Corporation (Japan).....	III-125
Pay TV Market.....	III-111	B. Market Analytics	III-126
IPTV in Hong Kong: A Market Profile	III-111	<i>Table 46: Rest of Asia-Pacific Current and Future</i>	
FTTH to Take Front Seat.....	III-112	<i>Analysis for IPTV by Number of Subscribers in</i>	
Competitive Structure	III-112	<i>Million for the Years 2004 through 2014</i>	
PCCW Leads from the Front	III-112	<i>(includes corresponding Graph/Chart)</i>	III-126
Laggards Losing the Battle to PCCW	III-113	<i>Table 47: Rest of Asia-Pacific Current and Future</i>	
Japan	III-113	<i>Analysis for IPTV by Annual Service Revenues</i>	
Pay TV Market.....	III-113	<i>in US\$ Million for the Years 2004 through 2014</i>	
IPTV Market.....	III-113	<i>(includes corresponding Graph/Chart)</i>	III-126
Lack of Subscriber Interest and		5. Rest of World	III-127
Regulatory Hurdles Hindering		A. Market Analysis	III-127
IPTV Prospects	III-114	Outlook	III-127
South Korea.....	III-114	Latin America – A Primer	III-127
An Advanced Market for Broadband		Brazil: Opportunities Galore for Service	
Penetration.....	III-114	Providers	III-127
<i>Table 44: Leading Players in Korean IPTV</i>		Product/Service Launches	III-128
<i>Market (2007 H1): Percentage Share Breakdown</i>		Strategic Corporate Developments	III-129
<i>of Market Revenues for Hanaro Telecom, KT, and</i>		Key IPTV Vendor/System Provider in	
<i>LG Dacom (includes corresponding</i>		Rest of World.....	III-132
<i>Graph/Chart)</i>	III-115	Orca Interactive Ltd. (Israel).....	III-132
<i>Table 45: Leading Players in Korean IPTV</i>		B. Market Analytics	III-133
<i>Market (2007 H1): Percentage Share Breakdown</i>		<i>Table 48: Rest of World Current and Future Analysis</i>	
<i>for Hanaro Telecom, KT, and LG Dacom by</i>		<i>for IPTV by Number of Subscribers in Million for</i>	
<i>Number of Subscribers (includes</i>		<i>the Years 2004 through 2014 (includes</i>	
<i>corresponding Graph/Chart)</i>	III-115	<i>corresponding Graph/Chart)</i>	III-133
Pending Regulatory Reforms	III-115	<i>Table 49: Rest of World Current and Future Analysis</i>	
Telcos Facing Intense Regulatory Barriers.....	III-115	<i>for IPTV by Annual Service Revenues in US\$ Million</i>	
Undermining Prospects for IPTV	III-115	<i>for the Years 2004 through 2010 (includes</i>	
India: Market with Strong Potential	III-116	<i>corresponding Graph/Chart)</i>	III-133

IV. COMPETITIVE LANDSCAPE