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Broadband TV

The Battle for Broadband TV: TelcoTV vs. Internet TV

The Clash between Telco TV, Internet TV,
and the Traditional TV and Film Industries

The entertainment market is changing with a shift from theatrical presentation and DVD rental and purchase to on demand and on line content delivery. The battle between the on demand providers is becoming quite intense but includes cooperation as well as competition.



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Annex

All of the charts that are included in Section 5: Business Case Scenarios and Section 6: Market Forecast are also included in the spreadsheet Annex that accompanies this report. In addition there are a number of charts that are not included in the report but that may provide additional clarity to this market.

The Annex includes the following worksheets:

Telco TV Subscribers

Broadband Subscribers

TelcoTV/Internet TV Viewing

Film Revenues

Business Case Assumptions

Business Case Charts

8 Appendix I: Companies in this Report

The following companies were consulted or profiled for this report.

Table 8-1: Companies Consulted for this Report

Name	Type	TelcoTV Operator	Telecom Systems	Internet TV Provider	User Generated	Internet Download	Content Distributor	Internet TV	Consultant
Apple iStore	Music and video download service					X			
AT&T	broadband operator in U.S.	X							
Belgacom	broadband operator in Belgium	X							
BitTorrent	Internet peer to peer video				X				
Blinkx	Internet video search			X					
Blip.tv	Internet advertising supported			X					
BNS, Ltd.	Hong Kong TelcoTV consultancy								X
BT	broadband operator in the UK	X							
Chunghwa Telecom	broadband operator in Taiwan	X							
CinemaNow	Internet movie download service					X			
ECI	Telecom systems company		X						
FastWeb	broadband operator in Italy	X							
Fora.tv	Internet video provider			X					
France Telecom	broadband operator in France	X							
Free	broadband operator in France	X							
Gotuit Media	Video search						X		
Joost	Internet TV							X	
KDDI	broadband operator in Japan	X							
Manitoba Telecom	broadband operator in Canada	X							
MovieBeam	Internet movie download service					X			
MovieLink	Internet movie download service					X			
NarrowStep	Internet TV							X	
NeoIndex	Internet movie download service			X					
Netflix	Internet movie download service					X			
Neuf Cegetel	broadband operator in France	X							



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Name	Type	Telco TV Operator	Telecom Systems	Internet TV Provider	User Generated	Internet Download	Content Distributor	Internet TV	Consultant
NTT	broadband operator in Japan	X							
PCCW	broadband operator in Hong Kong	X							
Sasktel	broadband operator in Canada	X							
SureWest	broadband operator in the U.S.	X							
Telefonica	broadband operator in Spain	X							
Telekom Austria	broadband operator in Austria	X							
Verizon	broadband operator in the U.S.	X							
Versatel	broadband operator in the Netherlands	X							
Walmart	Internet movie download service					X			
YouTube	Internet video service				X				

Source: TelecomView

9 Appendix II: Glossary

The following terms and organizations have been referred to in the text.

Acronym	Definition
AAA	Authentication, Authorization and Accounting
ABC	American Broadcasting Company
ADSL	Asymmetric Digital Subscriber Line
API	Application Program Interface
ARPU	Average Revenue per User (Usually monthly)
ATCA	Advanced Telecom Computing Architecture
ATIS	Alliance for Telecommunications Industry Solutions
ATV	Asia Television Limited
Billion	1,000,000,000 (1,000 Million)
BT	British Telecom
CAPEX	Capital Expenditure
CNBC	Consumer News and Business Channel
CNN	Cable News Network
CNO	Cable Network Operator (See also MSO)
CO	Central Office
CPE	Customer Premise Equipment
CPGA	Cost per gross add
CSCF	Call Session Control Function
DOCSIS	Data Over Cable Service Interface Specification
DS3	NA transmission standard for wideband communications
DSL	Digital Subscriber Line
DVD	Digital Video Disk
EBU	European Broadcasting Union
ESPN	Entertainment and Sports Programming Network
ETSI	European Telecommunications Standards Institute
EU	European Union
FA	Football Association
FCC	Federal Communications Commission
FNO	Fixed Network Operator
FTTH	Fiber to the Home
FOTP	Fiber to the Premise
GHz	Giga Hertz
HBO	Home Box Office
HD	High Definition
HDTV	High Definition Television
Hz	Hertz
IETF	Internet Engineering Task Force
IMS	IP Multimedia Subsystem
INO	Integrated Network Operator



Acronym	Definition
IP	Internet Protocol
IP v 6	IP version 6
IP/MPLS	IP/ Multi Protocol Label Switching
IPDC	Internet Protocol Data Casting
IPTV	Internet Protocol Television
ISP	Internet Service Provider
ITN	Independent Television News
ITU	International Telecommunications Union
kbps	Kilo bits per second
KDDI	Japanese Mobile Operator
kHz	Kilo Hertz
km	Kilometer
kW	Kilowatt
LG	Lucky Goldstar
LLU	Local Loop Unbundling
Mbps	Mega bits per second
MHz	Mega Hertz
Million	1,000,000
MPAA	Motion Picture Association of America
MPEG	Moving Picture Experts Group
MSNBC	Microsoft NBC network
MSO	Multimedia Services Operator (See also CNO)
MTV	Music Television
NGN	Next Generation Networks
NPV	Net Present Value
NRA	National Regulatory Authority
NTT	Nippon Telegraph and Telephone Corporation
OPEX	Operating Expenditure
OSA	Open System Architecture
PATS	Publicly Available Telephone Service
PBX	Private Branch Exchange
PCCW	Pacific Century CyberWorks Limited
PDA	Personal Digital Assistant
PRD	Product Requirements Definition
PSTN	Public Switched Telephone Network
PTT	See PoC
PVR	Personal Video Recorder
QoS	Quality of Service
QVGA	Quarter Video Graphics Array
RAI	Radiotelevisione Italiani
RTE	Radio Telefís Éireann
SCCAN	Seamless Converged Communication Across Networks
SD	Standard Definition
SIP	Session Initiation Protocol
SK Telecom	Korean mobile operator
SMS	Short Message Service



Acronym	Definition
SS7	Signaling System 7
Telco	Telephone company (incumbent or competitive)
TelcoTV	TV service offered by a broadband service provider
TIM	Telecom Italia Mobile
TISPAN	See ETSI
TV	Television
UK	United Kingdom
US	United States
VCR	Video Cassette Recorder
VDSL	Very High Speed Digital Subscriber Line
VoD	Video on Demand
VoIP	Voice over Internet Protocol
WACC	Weighted Average Cost of Capital
WAN	Wide Area Network
ZDF	Zweites Deutsches Fernsehen