

Broadband & Digital Home Market Tracker

Broadband Market to Post Zero Revenue Growth in 2009

By Lee Ratliff, Senior Analyst

Forecast**Frequency, Time Period**

- Quarterly, 5 quarters history, and 4 quarters forecast
- Two-year history, current year and forecast through 2011

Measures

- Subscribers by technology, country and service provider (cable, FTTH, xDSL)
- CPE units shipped by type of CPE (bridge, router, IAD, multi-media gateway, E-MTA)
- Silicon ports shipped (Infrastructure and CPE)
- Market share (xDSL silicon and DSL infrastructure and CPE units shipped)
- Factory revenues by broadband segment
- Equipment component TAM
- Infrastructure ports shipped (VDSL, ADSL, CMTS, OLT)

Regions, Markets

- China, Japan, Rest of Asia-Pacific
- North America, Latin America
- Europe, MEA
- On a subscriber basis 150 individual service providers and/or countries tracked

Detail Level

- Technology
- Region
- Country or service provider
- Units shipped
- Type of CPE
- Market share by quarter
- Broadband segment
- Equipment component TAM

Applications/Products Covered

- Broadband CPE (bridge, routers, IADs, E-MTA, Residential multi-media next generation gateways)
- Broadband aggregation (DSLAMs, CMTS, OLTs, etc)
- Home networking interfaces

Technologies Covered

- ADSL, ADSL2+, VDSL, VDSL2
- EPON, BPON, GPON
- Active Ethernet
- DOCSIS 2.0/3.0
- WiMAX
- Broadband over power lines
- Home networking: WiFi, power line, coax, phone line

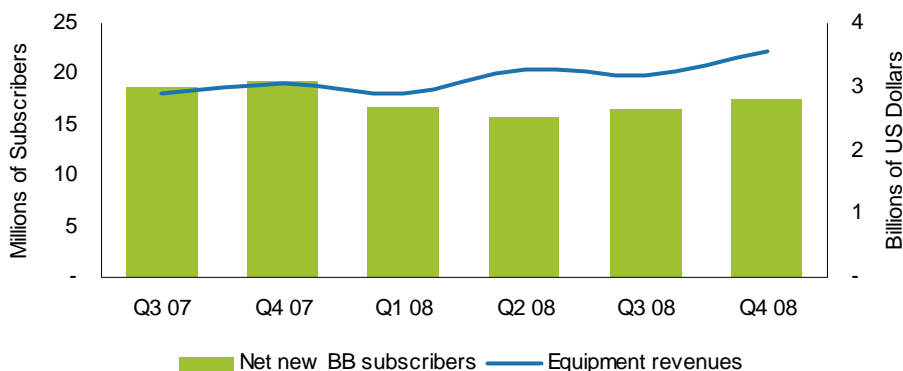
Broadband creates opportunities for OEMs, silicon suppliers and service providers. At the end of 2008 there were 400 million broadband subscribers worldwide, by 2013 there will be 735 million. Broadband to the home however is not sufficient. Broadband in the home is also required before the full potential of opportunities can be realized.

The focus of this series is the opportunities generated by the growth of broadband to and within the home.

The report provides quarterly in-depth analysis of the equipment and silicon opportunities present in the broadband market. The series includes subscriber growth by technology down to the provider, equipment growth and trends by region, silicon TAM, OEM/ODM and silicon supplier market shares. The series also covers the major quarterly events that affect the market.

The series also provides iSuppli quarterly and yearly forecasts for all aspects of the market.

Technologies covered include FTTH (E-PON and G-PON), VDSL2, ADSL, WiMAX, and DOCSIS. Within the home, home networking via power line, coax, phone line and wireless are tracked.

Net New Broadband Subscribers vs. BB Equipment Revenues**Critical Questions Answered**

- Which technologies are long-term survivors?
- What regions present the best opportunity?
- How will CPE functionality evolve by Region?
- What are the winning home networking technologies?
- Where are the emerging opportunities?
- How fast will new technologies take hold?
- What is happening on the standards front?
- What regulatory decrees will create inflection points in demand?
- Where should I direct my resources?

Who Should Read This?

- Silicon Suppliers
 - Product Marketing
 - Strategic Marketing
 - Sales
- OEM Suppliers
 - Chief technology officers
 - Strategic marketing
 - Product Marketing
 - Product line marketing
 - Sales
- Broadband Service Providers
 - Service managers
 - Procurement
 - Content managers

Lead Analyst

Lee Ratliff, Senior Analyst

Lee directs wired communications research at iSuppli, focusing on broadband and digital home areas. Lee brings to iSuppli extensive knowledge in semiconductor fabrication, marketing, and applications, as well as the dynamics of the consumer electronics and media markets.

Prior to iSuppli, Lee spent 13 years at Texas Instruments in roles ranging from hardware and software design to product line marketing and account management. He spent seven years in technical roles within TI's DLP group, participating in many of the early DLP projects in the consumer TV division. The balance of Lee's TI career involved marketing FireWire, USB, HDMI, UWB, and other connectivity semiconductors into the consumer A/V networking space. He also led efforts to win and execute many custom ASIC projects.

Lee graduated from Texas Tech University with a Bachelor of Science degree in Electrical Engineering.

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Broadband and Digital Home Scoreboard

Companies Mentioned

- Adtran
- Alcatel-Lucent
- Arris
- Broadcom
- Cisco
- Conexant
- ECI
- Huawei
- Ikanos
- Ikanos & Centillium
- Infineon Technologies
- Liberty Global
- Liberty Mutual
- Motorola
- Nokia-Siemens
- ONO
- RO Market
- STMicro
- Tellabs
- Thomson
- TI
- TrendChip
- UPC Slovakia
- UTStarcom
- Virgin Media
- ZTE