

Consumer Platforms Topical Report

Consumer Electronics as Residential Gateways: STBs Ripe for Integration, Differentiation

By Jagdish Rebello, PhD., Senior Director & Principal Analyst

Forecast**Frequency, Time Period**

- 4-year historical + 5-year annual forecasts

Measures

- IPTV subscribers by country (and carrier where applicable)
- Broadband subscribers by region and technology (xDSL, cable, Fiber, WiMAX)
- Broadband modems by functionality
- Unit shipments of Set-top Boxes (STBs) and STBs with integrated residential gateways

Regions, Markets

- Global
- Regional markets for broadband dynamics
 - North America
 - Europe
 - Asia Pacific
 - China
 - Japan
 - Latin America
 - Middle East and Africa

Applications/Products Covered

- Broadband modems
- Set-top Boxes (STBs)
- STBs with integrated residential gateways
- Consumer products with embedded wired and wireless connectivity

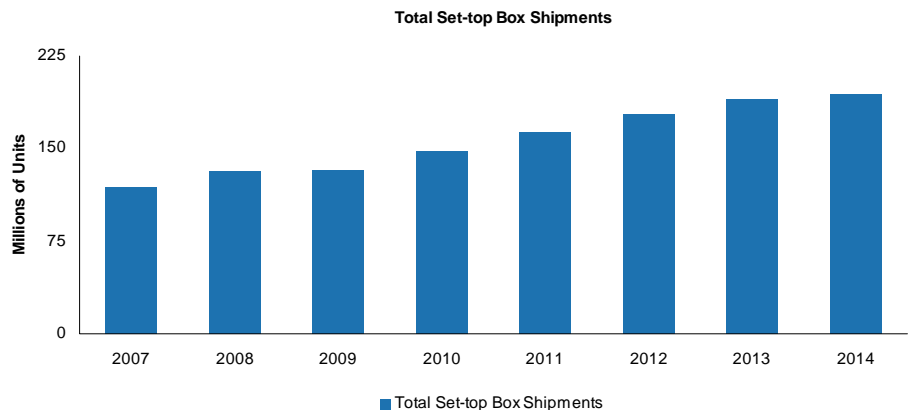
Technologies Covered

- IPTV
- Set-top Boxes
- Residential gateways

Multimedia service providers, telephone companies, and cable operators are focusing beyond just the consumer's telephone or television and because of this, the consumer's television, telephone, audio system, PC, home network and other appliances within the digital home are on their radar screens. That is why the role of the broadband WAN connection in the digital home is also expanding from being a simple bridge point into a gateway that controls the distribution of data, voice, and video around the home.

The home network of the future will enable various digital home appliances to communicate with each other, with applications and appliances outside the home. It will do this while providing security of content transported and guaranteeing high-quality service. Service providers have long realized that the company that controls the residential gateway to the home will be in the best position to manage, and monetize, the home network and content distribution within the home.

This report analyzes the dynamics of the integrated residential gateway market by first analyzing the Telco IPTV market, the network architectures that are being deployed to transport IPTV, the demands IPTV delivery places on the residential gateway, the role the residential gateways will play in delivering multimedia content throughout the digital home, and how it will interact with the digital home network and the IP STB.

**Key Issues Addressed:**

- What are the dynamics of the IPTV market? How will these dynamics impact the market for next generation residential gateways?
- What are the requirements for next generation residential gateways?
- Which consumer electronic devices are good candidates for the integration of the residential gateway functionality? Why?
- What is the penetration of embedded wireline and wireless connectivity in consumer electronics in the digital living room?

Applicable To:

- Semiconductor Suppliers to Set-top Boxes, Residential Gateways and LAN Access points
 - Strategic managers
 - Product managers
- Telecom Services Providers, cable operators
 - Product managers
 - Strategic managers
- Set-top Box OEMs
 - Product managers
- EMS/ODMs
 - Product managers
 - Procurement managers

Lead Analyst**Jagdish Rebello, Ph.D.,
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Jagdish is responsible for research and competitive analysis of various optical and opto-electronic components, wireless infrastructure and applications in optical networking communications. He also provides insights into emerging optical and wireless technologies such as Passive Optical Networks and WiMAX, while assessing their market impact.

Jagdish Rebello also directs the iSuppli India research initiative and analyzes the rapidly growing demand for consumer, automotive and wireless electronics in India as well as the emerging supply of electronic design and integration capabilities in India.

Prior to iSuppli, Jagdish worked with ADC Tele-communications as a Product Manager for several photonic components, directing the strategic and tactical marketing of MEMS switches, FBGs, optical couplers and WDMs - all specific to the telecommunications market.

Jagdish also successfully managed the optical spectroscopic detector line for Jobin Yvon, Inc. Jagdish has a PhD and MS in mechanical engineering from Ohio State University, an MBA in finance and marketing from Rutgers University, and a BS in mechanical engineering from the University of Bombay.

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