

**IPTV Market Tracker**

# Telco TV On Track To Reach 105 Million Subscribers in Five Years

By Lee Ratliff, Senior Analyst

**Forecast**

**Frequency, Time Period**

- 2-year history and 5-year forecasts
- 4 quarters history and 4 quarters forecast

**Measures**

- Subscribers: Broadband, IPTV, Cable, Satellite
- Service revenues and APRU for IPTV
- Equipment and software revenue forecasts: including networking equipment from access to long haul, IP STB, middleware, gateways in support of IPTV, edge routers,
- IPTV Set-top box shipments in terms of units and revenues
- Next generation gateways in support of IPTV (units and revenues)
- Home networking in support of IPTV transport (units and revenues)

**Regions, Markets**

- China, Japan, Rest of Asia-Pacific, North America, Latin America, Europe and MEA
- Plus 75 Telco's and CLECs

**Detail Level**

- Revenues, subscribers, port shipments, and silicon TAM

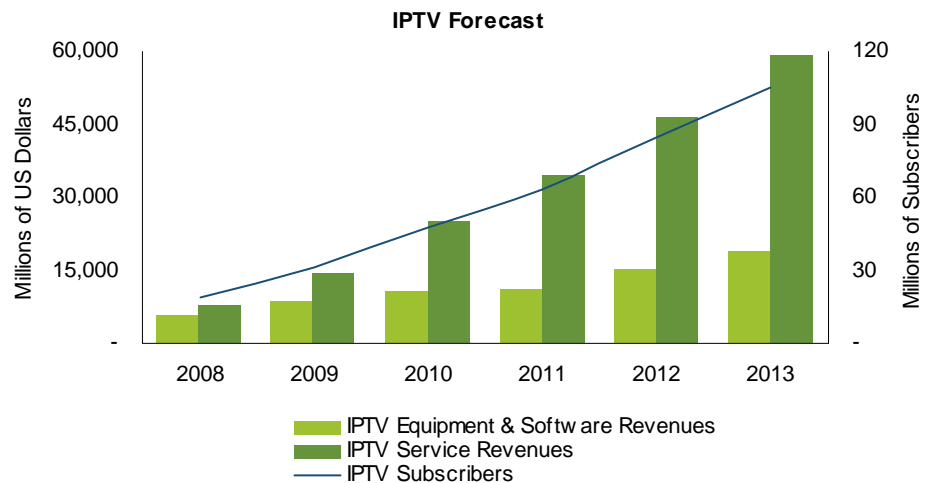
**Technologies Covered**

- Broadband (FTTH, xDSL, WiMAX,...)
- Home networking: Coax, Powerline, WiFi, Cat 5/Ethernet, phone line
- IPTV

Telco TV is the engine of change in the wired communications market, and current economic conditions are not slowing it down. By 2013 there will be 105 million Telco TV subscribers accounting for 15% of the pay for view market.

Telco TV, a subset of the IPTV market is creating significant opportunities for service providers, equipment OEMs and silicon suppliers. Within five years Telco TV equipment and software sales is forecasted to exceed \$15 billion, while service revenues will exceed \$59 billion. The objective of this report series is to provide participants with the necessary intelligence to become winners in this space.

The analysis within the report series provides in-depth analysis on; Pay IPTV subscribers by region and technology, Networking equipment both to and within the home supporting the transport of IPTV; Middleware enabling IPTV, client devices including IPSTBs and residential gateway/routers and service provider revenue and ARPU.



**Critical Questions Answered**

- Which telco's present the best revenue opportunities?
- What products will generate the most revenues?
- What is the IP set-top box opportunity?
- What access technology will win?
- How important is home networking?
- What new services will emerge from Telco TV deployments?
- Will the economic conditions of today slow down the growth of Telco TV?
- What are the regional differences?
- What do I need to do to succeed in this market?

**Who Should Read This?**

- Service providers
  - Product Marketing
  - Service planning
  - Procurement
- OEM
  - Strategic marketing and office of the chief technical officer
  - Product marketing
  - Product line management
- Silicon supplier
  - Strategic marketing and office of the chief technical officer
  - Product marketing
  - Product line management
  - Design engineers

### 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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