

IPTV: The Killer Broadband Application

A resource book for television over broadband



Telecommunications Management Group, Inc.

- **Forecast: Nearly 60 million IPTV subscribers by 2010**
- **IPTV is not limited to high-income economies**

A new report from Telecommunications Management Group, Inc. (TMG) entitled "IPTV: The Killer Broadband Application," forecasts that there will be nearly 60 million Internet Protocol television (IPTV) subscribers worldwide by the end of 2010. IPTV — which provides video services over managed IP networks to televisions in users' homes — has been doubling each year since its commercial introduction in 2002. There were 9.9 million IPTV subscribers around the world at the end of 2007, more than double the previous year, and TMG projects more than a 500 percent increase over the next three years. According to Michael Minges, TMG Senior Market Analyst and lead author of the report, "IPTV is revolutionizing the television market by introducing greater competition and providing consumers with a plethora of customizable content, viewable any time."

The report provides an overview of the Internet Protocol Television (IPTV) market. It is a rich resource for operators, manufacturers, regulators, policy makers, researchers and others. In addition to annual historical data (2002-2007) and 2010 forecast on the number IPTV subscribers for over 40 countries with IPTV at the beginning of 2008, the data in the report includes penetration rates for households with television sets, pay television households, broadband subscribers and broadband households. The report also includes a listing of IPTV providers around the world and IPTV pricing.

Other points of interest in the report include the finding that IPTV has succeeded in countries with relatively low pay television penetration but high broadband penetration. This is characteristic of Europe, which has the largest number of IPTV subscribers. European IPTV has also thrived due to fewer regulatory obstacles, nationwide telecommunications operators and widely available broadband networks.

IPTV is not limited to high-income economies. China and India have launched IPTV, as have several countries in Africa. TMG forecasts that China and the United States will be the world's largest IPTV markets by 2010.

IPTV Subscribers by Region, 2007	
Europe	5.3 Million
Asia	3.3 Million
Americas	1.3 Million

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- METHODOLOGY AND METRICS
- IPTV MARKET DEVELOPMENT
- PRICING
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Region, Country and Operator Profiles Included

Europe

Austria
Telekom Austria
Belgium
Belgacom
Croatia
T-Com
Vodatel
Cyprus
CYTA
Czech Republic
O2
Denmark
TDC
Estonia
Eesti Telecom
Finland
Alcom
Finnnet
Sonera
France
Alice
France Telecom
Free
Neuf
Germany
Deutsche Telekom
HanseNet
Greece
On Telecom
Hungary
Magyar Telekom
Iceland
Iceland Telecom
Ireland
Magnet
Smart Telecom
Italy
Fastweb
Telecom Italia
Latvia
Lattelecom

Lithuania
Leo
Montenegro
Crnogorski Telekom
Netherlands
KPN
Tele2
Norway
Comvie
Lyse
Poland
TP
Multimedia Polska
Portugal
Portugal Telecom
Sonaecom
Russia
Corbina
Sistema
Slovak Republic
Slovak Telecom
Slovenia
Telekom Slovenia
Tus Telekom
T-2
Spain
Grupalia Internet
Jazztel
Orange
Telefónica
Sweden
Bredbandsbolaget
Canal Digital
FastTV
Telia
Switzerland
Swisscom
United Kingdom
BT
Tiscali

Asia-Pacific

China
China Telecom
China Netcom
Hong Kong
PCCW
TVB Pay Vision
HKBN
India
BSNL
MTNL
Japan
Softbank
KDDI
K-Opticom
NTT
Korea (Rep.)
Hanaro Telecom
Korea Telecom
Singapore
Singtel
Taiwan
CHT
Thailand
ADC
True

North America

Canada
MTS
Sasktel
TELUS
Aliant
Bell Canada
United States
AT&T
Verizon

Latin America

Brazil
Brasil Telecom
Chile
CTC

Africa and Middle East

Maroc Telecom
Mauritius Telecom
Sonatel
Telecom Egypt



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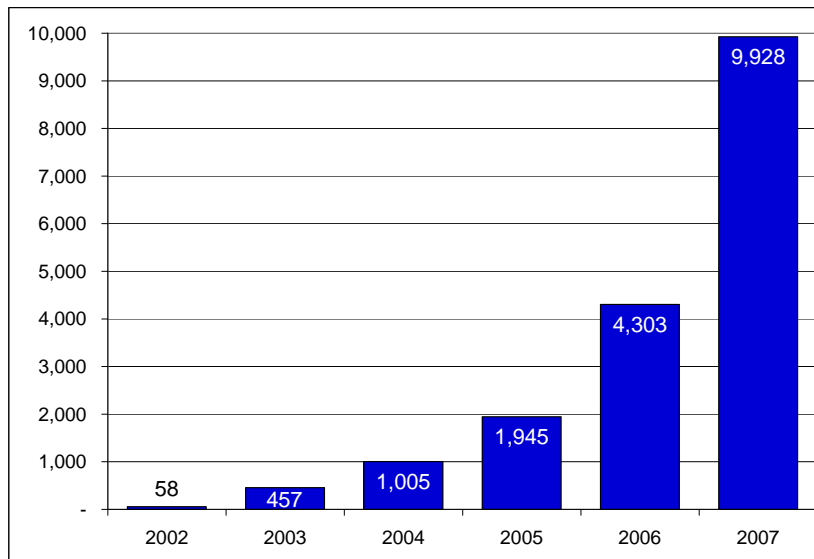
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Figure 2: Number of worldwide IPTV subscribers, 000s



Source: TMG, Inc.

For more information about the report, including ordering details, see

<http://reports.tmgtelecom.com/iptv>



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