EXECUTIVE SUMMARY

The People’s Republic of China is the world’s largest telecom market by population, and it is well on its way to becoming one of the largest by revenue as well. As is the case with telecom operators worldwide, China’s fixed-line operators see IPTV as a highly profitable and desirable service.

China’s largest telecom operators and broadcast/cable TV providers are now gearing up to deploy products and technologies that will deliver IPTV service in key markets nationwide, creating a potentially huge opportunity for IPTV technology suppliers to tap into one of the world’s largest and fastest-growing broadband markets.

Presently, the IPTV market in China is still in its developmental stage, meaning that although network operators are making some technology choices now, there are still plenty of unresolved issues to be settled before IPTV becomes a major commercial force in China.

IPTV in China: Market Prospects explores the current and projected deployment of IPTV technologies and services in China. The report presents hard data on the regions in which IPTV is expected to be most fully deployed; the network operators that will be deploying IPTV in those markets; and the likely timeframes and scope of deployment for IPTV (numbers of subscribers, capital expenses).

Based on original research and data gathered directly from network operators and technology suppliers, IPTV in China: Market Prospects delivers the most independent and comprehensive assessment available to date of IPTV service deployment in China. The report includes current and projected IPTV service deployment and capex spending not only for China’s principal telecom operators (China Netcom and China Telecom), but also for a range of national and regional broadcast and cable TV network providers. It also evaluates the market position of IPTV equipment vendors now doing business in China, including both domestic and foreign suppliers.

IPTV subscribers are projected to grow by an order of magnitude between 2004 and 2010, from less than 50,000 to about 5 million. IPTV in China: Market Prospects pinpoints the regions where service growth is expected to be highest. It outlines the technical, business, and regulatory challenges facing network operators as they expand their IPTV service offerings; it also identifies key areas of opportunity for technology suppliers interested in entering or expanding their presence in the world’s largest broadband services market.
Using data gathered from independent sources and from the carriers themselves, **IPTV in China: Market Prospects** relates both current and projected capex spending on IPTV technology and infrastructure for China’s major telecom operators and broadcast and cable providers. This critical information gives prospective technology suppliers a credible view into exactly how IPTV deployments will be funded, and where the most lucrative opportunities are likely to surface.

This report analyzes IPTV deployment plans for the following service providers:

- Beijing People’s Radio Station (BJIPTV.com)
- China Central Television (CCTV)
- China International Television
- China Netcom
- China Telecom
- Golden Eagle Broadband
- PCCW
- Shanghai Media Group
- Xinhua News Agency
It also analyzes the IPTV product portfolios and deployments of the following vendors:

- Alcatel Shanghai Bell
- Huawei Technologies
- Onewave Technologies
- Siemens
- UTStarcom
- ZTE

Report Scope & Structure

IPTV in China: Market Prospects is structured as follows:

Section I is an introduction to the report, with complete report key findings.

Section II provides an overview of China's IPTV market, including information on broadcast/cable TV operators and telecom operators, market structure, and the service progress of the principal market participants.

Section III identifies and analyzes the main bottlenecks and unresolved issues in China's IPTV development and provides information on the supervision offices and departments in charge of IPTV in China.

Section IV analyzes the hottest regions and leading operators in China's IPTV development; provides data for capex on IPTV by Chinese operators; and examines the advantages and disadvantages of the various operators making a play in this space.

Section V explores three test cases of IPTV development in China – including deployments in Henan (IPTV in rural areas), Hangzhou (both DTV and IPTV), and Shanghai Daning (dedicated IPTV network).

Section VI forecasts IPTV user growth in China and analyzes the strategies and primary deployments of the leading vendors in China's IPTV market: Alcatel Shanghai Bell, Huawei Technologies, Onewave Technologies, Siemens, UTStarcom, and ZTE.

IPTV in China: Market Prospects is essential reading for a wide range of industry participants, including:

- IPTV technology manufacturers: What are the most lucrative selling opportunities for IPTV technology in China’s emerging markets? Which carriers are expanding capex in this sector? What are the near-term and long-term projections for IPTV-related capex growth in China? How will national and provincial regulations affect your ability to do business in this growing economy?

- Broadband and infrastructure equipment manufacturers: Which technologies will garner the largest share of China’s IPTV capex budgets? Do you have relationships in place with key partners to take advantage of expected changes in spending patterns?

- Investors: Which technology suppliers are in the best position to capture market share in this important telecom industry sector? When will this sector begin to show meaningful and sustainable growth?

IPTV in China: Market Prospects is published in PDF format.