

CABLE INFRASTRUCTURE MARKET STATUS, OPTIONS AND STRATEGIES Forecasts to 2002

Market Parameters:

**Cable capital
spending**

Subscriber base

Node analysis

Cost per node

Miles of fiber

Miles of coax

Network upgrade path

Internet telephony

Competitive analysis demands understanding of cable infrastructure status. Cable upgrades provide broadband two way communications paths. Hybrid fiber loops are needed to offer high definition TV and telephony competition over the Internet.

- Hybrid-fiber infrastructure provides broadband access
- Digital cable delivery permits the addition of subscription channels
- Cable companies are implementing clear return paths that permit set top box Internet access
- Internet services represent potential for incremental revenue from existing customers
- Cable infrastructure will be 98% upgraded by 2000

THE STUDY ADDRESSES:

- **Market strategies for partnering**
- **Strategic positioning of cable companies**
- **Strategic market alliances / Market directions**
- **Risk/reward scenarios**
- **Access to customer bases**

You NEED This Study

Market strategy dynamics:**COMPANIES PROFILED**

@HOME NETWORK
 ADELPHI
 HYPERION
 TELECOMMUNICATIONS
 COMCAST
 CORNING
 COX COMMUNICATIONS

SPECTRUM
 SUN MICROSYSTEMS
 TCI
 TELEDISIC
 TELEPORT
 TERAYON
 TIME WARNER

U S WEST MEDIA GROUP
 U S WEST !NTERPRISE
 COMMSCOPE
 GENERAL SIGNAL
 IMEDIA
 NEXTLEVEL SYSTEMS

REPORT OUTLINE**Cable infrastructure****Executive summary****1. Cable infrastructure market description****Issues****2. Cable infrastructure market forecasts****Cable market trends****Households profile****Cable industry profile****Clustering****U.S. Internet**

Number of users

Internet hosts

Cable modems

ISDN

xDSL

Global Internet

Internet telephony

Telecommunications**Fiber/coax network**

US West

TCI

Direct broadcast satellite

(DBS)

Cable infrastructure**upgrades****Local market competition****MMDS/LMDS****Competitive market aspects**

Digital compression

Private cable

Broadcast television

FCC

3. Cable services positioning for broadband infrastructure

Time Warner

Cox technological advances

Services network**architecture requirements**

Cox ring within a ring /

WDM

Broadband network cost**analysis****Architecture**

Cox deployment of broadband

Headend equipment**Cable services**

Adelphi

Internet services

@home

New cable programming**services**

Adelphi Internet

Telephone infrastructure**Telephone services**

Time Warner Communications

TCI

Cox

Continental

Adelphi

Consumer set top boxes

Scientific-Atlanta

Cox

COMCAST cable

TCI

Sun Microsystems / TCI

General Instrument / Adelphi

Business services**PCS mobile telephone****Satellite**

Primmest

Network management

Cabletron

4. Cable infrastructure technology**Digital cable****Digital compression**

Cox

TCI

Fiber optics**Network architecture**

Cox Fibernet

@home

Regional data centers**Cable modems****Network operations center****xDSL/cable modem****competitive issues****Current technology trials**

Impulse pay-per-view in

Emerald coast cable and

impulse technology

Transparent LAN service**ATM**

Cell relay

Permanent virtual connections

Sonet**Hybrid fiber-coax****Ingress/thermal noise****Return transmission issues****Satellite**

Celestri

Digital set top boxes

Scientific-Atlanta

Interactive-ready set-top

terminal

5. Cable company profiles**@home network****Adelphi**

Hyperion Telecommunications

Cablevision**Century****Comcast Corporation****Corning****Cox Communications****Jones Intercable**

Lenfest Group
Media One
Spectrum
Sun Microsystems
TCI
Teledisc
Teleport
Terayon
Time Warner
U S West media group
U S West Interprise

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equipment provider company
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Commscope
General Signal
Imedia
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Wide area network
connectivity of schools
Cox Fibernet

Telemedicine
Cox Fibernet
Security
Time Warner
Broadband cable online
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US West
Work place flexibility
Time Warner linerunner
Videoconferencing
US West video solutions

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Internet Global Markets Units & Dollars

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REPORT METHODOLOGY

This is the twenty-seventh in a series of market forecasts of wireline, wireless, Internet data communications, telecommunications, and information services. The project leaders have significant experience preparing industry studies. Forecasts are based on primary research and proprietary data bases. In-depth interviews are conducted with a broad range of key participants in the market.

ABOUT THE COMPANY

WinterGreen Research, founded in 1985, provides strategic market assessments in telecommunications, communications equipment, health care and advanced computer technology. Industry reports focus on opportunities that will expand existing markets or develop major new markets. The reports assess new product and service positioning strategies; new and evolving technologies; and technological impacts on products, services, and markets. Market shares are estimated. Leading market participants are profiled, and their marketing strategies, acquisitions, and strategic alliances are discussed. The principals of WinterGreen Research have been involved in analysis and forecasting of international business opportunities in telecommunications and advanced computer technology markets for over 30 years.

ABOUT THE PRINCIPAL AUTHORS

Ellen T. Curtiss, Technical Director, co-founder of WinterGreen Research, conducts strategic and market assessments in technology-based industries. Previously she was a member of the staff of Arthur D. Little, Inc., for 23 years, most recently as Vice President of Arthur D. Little Decision Resources, specializing in strategic planning and market development services. She is a graduate of Boston University and the Program for Management Development at Harvard Graduate School of Business Administration.

Susan Eustis, Vice President, co-founder of WinterGreen Research, has done research in communications and computer markets and applications. She holds several patents in microcomputing and parallel processing. She is the author of recent studies of the Regional Bell Operating Companies' marketing strategies, worldwide telecommunications markets, and of a study of Internet and Intranet markets. Ms. Eustis is a graduate of Barnard College.

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