Cable Dynamics - Can Cable Hold onto its Leadership in the New Superfast Access Market

Description: Cable companies are in the spotlight these days because of the value that their networks and subscribers represent, at a time when superfast access is developing, market consolidation is heating up and the industry in general is in the throes of major changes.

The author provides a detailed look at this market, based on an analysis of the current situation in the different countries and of key market players, along with an examination of the latest technical developments and what lies ahead for the cable market.

The report focuses in particular on the threat to cablecos’ TV and video revenue, the growing importance of fixed-mobile convergence in stakeholders’ strategies, and the race against telcos to deliver Gigabit-speed access.

Countries Covered:
- Germany
- France
- The UK
- Belgium
- The Netherlands
- Spain
- Portugal
- USA

Contents:
1. Executive Summary
   1.1. Cable confirms its leadership in the supply of superfast access
   1.2. A market in search of new revenue streams
   1.3. Ongoing market consolidation

2. Methodology and definitions
   2.1. General methodology of reports
   2.2. Methodology specific to this report

3. Cable in the superfast access market
   3.1. General overview
   3.2. The United States
   3.3. Europe
      3.3.1. Liberty Global, pan-European operator
   3.3.2. Germany
   3.3.3. Belgium
   3.3.4. Spain
   3.3.5. France
   3.3.6. The Netherlands
   3.3.7. Portugal
   3.3.8. The UK

4. Technological developments
   4.1. The DOCSIS standard
   4.2. Datarates enabled by the different network architectures
      4.2.1. Advertised download speeds and technical properties
      4.2.2. Theoretical factors that determine users’ actual connection speeds
      4.2.3. Headline upload speeds and technical properties
   4.2.4. Coaxial cable’s limitations and ability to supply faster connections
   4.2.5. Hardware limitations after 1 Gbps
   4.3. Constraints tied to FTTLA network rollouts
4.4. DOCSIS 3.1: entering the Gigabit race

5. Market outlook

5.1. Equipment suppliers working on technological developments to help cable companies transition to SFB

5.2. Market consolidation: the United States vs. Europe

5.2.1. The United States: cable market consolidation to bolster Internet access revenue

5.2.2. Europe: market consolidation built around fixed-mobile convergence

5.3. New growth outlets for cable companies

5.3.1. The business market

5.3.2. The home security/smart home market

Tables
Table 1: BB/SFB data for the United States, December 2014
Table 2: A selection of Comcast triple play bundles
Table 3: Cable company Liberty Global: Internet subscribers and homes passed at the end of 2014
Table 4: BB/SFB data for Germany, December 2014
Table 5: Selection of KDG triple play bundles
Table 6: BB/SFB data for Belgium, December 2014
Table 7: Selection of Telenet triple and quadruple play bundles
Table 8: BB/SFB data for Spain, December 2014
Table 9: Selection of ONO triple and quadruple play bundles
Table 10: BB/SFB data for France, December 2014
Table 11: Homes passed for SFB by Numericable over networks with cable in the last mile, 2013-2015
Table 12: Selection of Numericable triple play bundles
Table 13: BB/SFB data for the Netherlands, December 2014
Table 14: Selection of Ziggo triple play bundles
Table 15: BB/SFB data for Portugal, December 2014
Table 16: Selection of Nos triple and quadruple play bundles
Table 17: BB/SFB data for the UK, December 2014
Table 18: Virgin Media triple/quadruple play bundles at the end of October 2015
Table 19: Connection speeds and technical features of SFR – Numericable plans
Table 20: Cable companies’ maximum headline speeds in the countries being examined
Table 21: Maximum theoretical speeds for Wi-Fi and Ethernet technologies (by version of the standard)
Table 22: US cable companies’ pre-merger/acquisition situation, at the end of 2014
Table 23: Projection of US cable companies’ post-merger/acquisition positions at the end of 2014 (contingent on antitrust authorities’ approval)

Figures
Figure 1: High-speed access customers at the end of 2014: BB vs. SFB
Figure 2: Breakdown of Internet subscribers using an SFB network by technology, in a selection of countries, as of December 2014
Figure 3: Breakdown of BB/SFB subscribers in the United States by access technology, December 2014
Figure 4: Market breakdown between BB and SFB in the United States, December 2014
Figure 5: Top SFB providers’ market share in the United States, December 2014
Figure 6: SFB market growth in the United States by technology, 2012-2014
Figure 7: SFB coverage in the United States (download speeds starting at 30 Mbps)
Figure 8: Growth of Comcast’s revenue by business area, 2011-2015
Figure 9: Growth of Comcast subscriber numbers, 2010-2015
Figure 10: Breakdown of the Cable & Communications division’s revenue in 2014
Figure 11: Breakdown of Comcast subscribers at the end of 2014
Figure 12: Data on the potential new Charter – TWC – Bright House entity
Figure 13: Footprint of the potential new Charter – TWC – Bright House entity
Figure 14: SFB market competition for a selection cable companies in the United States
Figure 15: Liberty Global brands
Figure 16: Breakdown of Liberty Global revenue in 2014
Figure 17: Breakdown of Liberty Global subscribers at the end of 2014
Figure 18: Breakdown of BB/SFB subscribers in Germany by technology, December 2014
Figure 19: Market breakdown between BB and SFB in Germany, December 2014
Figure 20: Top SFB providers’ market share, in Germany, December 2014
Figure 21: SFB market growth in Germany by technology, 2011-2014
Figure 22: KDG’s footprint as of Q1 2015
Figure 23: Breakdown of BB/SFB subscribers in Belgium by technology, December 2014
Figure 24: Market breakdown between BB and SFB in Belgium, December 2014
Figure 25: Top SFB providers’ market share in Belgium, December 2014
Figure 26: SFB market growth in Belgium by technology, 2012-2014
Figure 27: Breakdown of Teletel subscribers, as of 30 June 2015
Figure 28: Breakdown of BB/SFB subscribers in Spain by technology, December 2014
Figure 29: Market breakdown between BB and SFB in Spain, December 2014
Figure 30: Top SFB providers’ market share in Spain, December 2014
Figure 31: SFB market growth in Spain by technology, 2010-2014
Figure 32: Breakdown of ONO-Vodafone España revenue in 2014
Figure 33: Breakdown of BB/SFB subscribers in France by technology, December 2014
Figure 34: Market breakdown between BB and SFB in France, December 2014
Figure 35: Top SFB providers’ market share in France, December 2014
Figure 36: SFB market growth in France by technology, 2011-2014
Figure 37: Breakdown of BB/SFB subscribers in the Netherlands by technology, December 2014
Figure 38: Market breakdown between BB and SFB in the Netherlands, December 2014
Figure 39: Top SFB providers’ market share in the Netherlands, December 2014
Figure 40: SFB market growth in the Netherlands by technology, 2012-2014
Figure 41: Breakdown of BB/SFB subscribers in Portugal by technology, December 2014
Figure 42: Market breakdown between BB and SFB in Portugal, December 2014
Figure 43: Top SFB providers’ market share in Portugal, December 2014
Figure 44: SFB market growth in Portugal by technology, 2010-2014
Figure 45: The “Nos Wi-Fi” network of hotspots
Figure 46: Breakdown of BB/SFB subscribers in the UK by technology, December 2014
Figure 47: Market breakdown between BB and SFB in the UK, December 2014
Figure 48: Top SFB providers’ market share in the UK, December 2014
Figure 49: SFB market growth in the UK by technology, 2010-2014
Figure 50: Breakdown of Virgin Media subscribers
Figure 51: Virgin Media Wi-Fi pass for Wi-Fi access in the London underground
Figure 52: Frequencies used by the DOCSIS 3.0 and 3.1 standards
Figure 53: How connection speeds are affected by distance, for the three main types of fixed SFB infrastructure
Figure 54: Provisional roadmap for DOCSIS 3.1 (Today = 2013)
Figure 55: Integrated architecture of Cisco’s multi-technology CCAP platform
Figure 56: Change in the breakdown of the pay-TV market in the United States
Figure 57: Three sources of growth for Suddenlink
Figure 58: XFINITY Home Secure & Control Packages

Ordering:
Order Online - [http://www.researchandmarkets.com/reports/3505777/](http://www.researchandmarkets.com/reports/3505777/)
Order by Fax - using the form below
Order by Post - print the order form below and send to

Research and Markets,
Guinness Centre,
Taylors Lane,
Dublin 8,
Ireland.
Fax Order Form
To place an order via fax simply print this form, fill in the information below and fax the completed form to 646-607-1907 (from USA) or +353-1-481-1716 (from Rest of World). If you have any questions please visit http://www.researchandmarkets.com/contact/

Order Information
Please verify that the product information is correct and select the format(s) you require.

| Product Name: | Cable Dynamics - Can Cable Hold onto its Leadership in the New Superfast Access Market |
| Web Address: | [http://www.researchandmarkets.com/reports/3505777/](http://www.researchandmarkets.com/reports/3505777/) |
| Office Code: | SCPLVR9K |

Product Formats
Please select the product formats and quantity you require:

- **Electronic (PDF) - 1 - 5 Users:** USD 3403
- **Electronic (PDF) - Enterprisewide:** USD 5105

Contact Information
Please enter all the information below in BLOCK CAPITALS

| Title: | Mr ☐ Mrs ☐ Dr ☐ Miss ☐ Ms ☐ Prof ☐ |
| First Name: | ____________________________ | Last Name: | ____________________________ |
| Email Address: * | ____________________________ |
| Job Title: | ____________________________ |
| Organisation: | ____________________________ |
| Address: | ____________________________ |
| City: | ____________________________ |
| Postal / Zip Code: | ____________________________ |
| Country: | ____________________________ |
| Phone Number: | ____________________________ |
| Fax Number: | ____________________________ |

* Please refrain from using free email accounts when ordering (e.g. Yahoo, Hotmail, AOL)
Payment Information

Please indicate the payment method you would like to use by selecting the appropriate box.

☐ Pay by credit card: You will receive an email with a link to a secure webpage to enter your credit card details.

☐ Pay by check: Please post the check, accompanied by this form, to:
Research and Markets,
Guinness Center,
Taylors Lane,
Dublin 8,
Ireland.

☐ Pay by wire transfer: Please transfer funds to:
Account number 833 130 83
Sort code 98-53-30
Swift code ULSBIE2D
IBAN number IE78ULSB98533083313083
Bank Address Ulster Bank,
27-35 Main Street,
Blackrock,
Co. Dublin,
Ireland.

If you have a Marketing Code please enter it below:

Marketing Code: ____________________________

Please note that by ordering from Research and Markets you are agreeing to our Terms and Conditions at http://www.researchandmarkets.com/info/terms.asp

Please fax this form to:
(646) 607-1907 or (646) 964-6609 - From USA
+353-1-481-1716 or +353-1-653-1571 - From Rest of World