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CED's BROADBAND 50 - DECEMBER 2004
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Sweat, Blood and Broadband

**The Broadband 50
~
December 2004**



Sweat, Blood and Broadband

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News Corp	Harmonic	TI & Broadcom	Cable's 'Red Button'	The Videophone
Verizon	Arris	Charter	Portable video	VOD's fresh meat
SBC	SeaChange	BigBand	TiVo	Intellon
Cox	Commercial services	Panasonic	Vidiom	Broadband over powerline
Scientific-Atlanta	The SIP guys	Nortel	DOCSIS 3.0	Pace
Motorola	N2 Broadband	Cedar Point	Kasenna	WildBlue
Liberty Media	Going mostly digital	IPTV	Concurrent	Entropic

—The Broadband 50 Hall of Fame—

Here's a look back at the companies, people, technologies and broadband "categories" that made the list in the first three iterations of the CED Broadband 50. Many of them are still around, going strong. Some have sold out and cashed in their chips.

Still others aren't with us anymore because they shut their doors.

Either way, they were considered to be among the best and brightest of their kind at the time.



41 through 50

41 Net2Phone



Revvng up turnkey VoIP

Fueled by a raft of cable deployments, Net2Phone has made the grade and graduated from last year's Area 51 and into this year's Broadband 50.



Net2Phone's recent wave of success is riding on the fact that cable operators around the world want to offer IP telephony services, but don't necessarily have the in-house resources to make it happen. Offering a range of turnkey offerings that place more or less financial risk on the MSO, depending on the operator's situation and goals, Net2Phone is starting to carve out a nice business with small- and medium-sized customers, including the likes of Bresnan Communications, Cequel III and corporate cousin Liberty Cablevision in Puerto Rico. It also notched a hunting license with the National Cable Television Cooperative (NCTC). Net2Phone's software and integration expertise then provides the glue to hold it all together.

Net2Phone is in a great spot to cut some business from the Tier II and Tier III operators, but it will have a bigger challenge trying to win a slice of the pie with the largest MSOs. Not that there is anything wrong with that. After all, there will be plenty of VoIP business to go around in 2005 when deployments really heat up. —JB

42 Ciena

Who are these guys?

What? Who? That's right—Ciena, the company more known for telecom infrastructure products than broadband.



A key reason is the company's acquisition of Internet Photonics, as well as a new focus on broadband articulated by company management.

Ciena put a lot of muscle behind the acquisition of VOD transport provider Internet Photonics when the company announced the purchase in late 2003, expanding the product portfolio to include Layer 0/1/2 packet switching and optical Ethernet transport.

That means Ciena can now offer its customers converged, multiservice transport and switching of VOD, VoIP, high-speed data backhaul, wireless backhaul, HDTV, commercial services and more.

A year ago, IP could count five cable operators as customers; today, the number stands at nine. Whereas the company's equipment passed 6 million homes a year ago, it now passes 15 million, with more to come.

The IP acquisition was part of a total company makeover as well. The company now touts itself as a "network specialist" that's focused on solving business problems.

The application-based focus concentrates on: access infrastructure upgrades; storage and Ethernet service value; network scaling for high-bandwidth applications; core network convergence and automation; and packet network integration. —RB

43 ICTV

Finding strength in iTV

ICTV Inc. is the embodiment of the old saying, "What doesn't kill you, only makes you stronger." ICTV is more than a decade old, and most of that time it has survived without the financial sustenance that deployments provide, so let's just say it has developed quite a constitution after living through so many lean years.



We took a leap of faith last year by giving ICTV the 49th spot in the Broadband 50. And we're happy to see that our decision wasn't a poor one. Considering where it started, ICTV went on a relative roll in 2004, scoring deals with operators such as Grande Communications and Time Warner Cable.



2005 should be an even better year as MSOs ramp up their interactive television activities and try to extend the life of those thin-client set-tops. ICTV can only hope that its HeadendWare platform, which places most of the processing power at the headend, is the order of the day.

And cable's not the only place it is looking to build its business. At last check, this iTV veteran firm was busy pouring its foundation for the telco TV world, securing integration deals with IPTV set-top providers such as Amino Communication and i3micro. —JB

44 The Videophone

Living la vida Jetsons

OK, you can stop snickering. Yes, the concept of the videophone has been around since the 1964 World Fair and Expo, when AT&T first demonstrated it. But these days, with support from developing Internet Protocol technologies and industry guidelines such as PacketCable Multimedia, the idea of seeing and hearing someone you call is not so far-fetched.



The first videophone products mostly aimed at enterprise rollout are starting to come into focus. After chucking its interactive TV play, WorldGate Communications is on track toward a videophone play with its first offering, Ojo. In May, Motorola Inc. signed a deal to become Ojo's exclusive distributor, marketing the videophone as part of its Connected Home product line. In September that yielded the first Ojo order valued at \$5 million.

Meanwhile, Viseon Inc. also has gained visibility in the videophone competition, landing a deal with Time Warner Cable's Northeast Ohio division to offer its VisiFone and VidiFone Eye-to-Eye service to enterprise

high-speed data customers. —KB
[image: PicPhone.tif (AT&T's '60s-era Picturephone.)]

45 VOD's fresh meat

A slab of on-demand heaven

The era of "open" VOD is opening the door for a batch of next-gen video server vendors. Before that option became available, the only way server vendors not named Concurrent Computer, nCUBE or SeaChange could get inside was by breaking down the door...with their heads.



While we are hearing lots of great things from companies such as Entone and Matrixstream, our sources tell us that Broadbus Technologies (a vendor that specializes in RAM-based servers) and Arroyo Video Solutions (a startup headed up by former Insight exec Kim Kelly) are getting most of the mindshare in the cable sphere. 2005 will tell us whether that also means the operators will be sharing the VOD wealth, as well.

46 Intellon

A new kind of power play

Powerline home networking has been the runt of the broadband technology litter so far, but with advances made by the likes of Intellon Inc., it is showing signs of a growth spurt.



Up to now, the big problem with powerline technology was the throughput, which has hovered at a mere 14 Megabits per second—enough for data and perhaps voice traffic, but not for the video and multimedia streams most envision for the home network of

the future.

Intellon has been key in a recent effort to put even more juice into powerline home networking through the HomePlug Powerline Alliance marketing group. This fall the group announced it was putting the finishing touches on a new specification, HomePlug AV, that would boost broadband throughput to within 200 Mbps. Products supporting the new scheme are expected in late 2005.

Until then, Intellon has come out with an interim silicon chipset that can boost throughput to the 85 Mbps range, enough to support broadband video transport.
-KB

47 Broadband over powerline

Contender or pretender?

Home powerline's outside plant sibling is broadband over powerline (BPL), and it also showed signs of increased energy lately.



The first shot of power came in July, when the Institute of Electrical and Electronics Engineers (IEEE) announced it would begin developing a standard for BPL dubbed IEEE P1675, "Standard for Broadband over Power Line Hardware." The project's goal is to give electric utilities a standard for setting up BPL networks, as well as guidelines for installing hardware and distribution lines. Completion? Mid-2006.

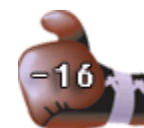
A second power boost came in October, when the FCC established the guidelines mainly to protect existing licensed radio services from interference issues stemming from BPL networks, but the move also put the technology back on the industry radar. While major utilities still appear skeptical about BPL's prospects, the technology does have a major booster in FCC Chairman Michael Powell.

Despite numerous trials among energy utilities, only one—Cincinnati's Cinergy Corp.—has rolled out a broadband over powerline service. But with FCC support and standards to govern interoperability, it may be that BPL will arise in the coming years as a more powerful broadband contender. -KB

48 Pace Micro Technology

The big payoff

Every year we do this list, we talk about Pace's chances of making it big in the domestic cable set-top game. And every year it seems that we are left wanting. If Pace is indeed positioned to benefit from a third-party set-top explosion with U.S. MSOs, that fuse must start in the U.K. and end somewhere in the nether regions of Montana, it has taken so long.



On the bright side, Pace has licenses for both of the major cable conditional access systems (Motorola Broadband's and Scientific-Atlanta's) and has notched some nice deployment deals with Time Warner Cable, Brighthouse Networks and Comcast Cable. But wait, that's what I wrote last year. Sigh.

Let's try this again, shall we?

Cable operators always ask (demand) that their set-top vendors drive more innovation into their products. Pace has always been an inventive sort, though its efforts don't always translate into big orders.

Remember that digital set-top that incorporated the Sega Dreamcast console? Interesting concept. Not deployable. The Digital Video Adapter, a "set-back" device designed to help cable with its all-digital migration? On the shelf. But that, as they say, is also old hat. Sigh (again).

Wait, I know, I know! Pioneer is mothballing its MSO-direct digital set-top plans, all but paving a path for Pace. Yes! That's it! I have solved this mystery! Yea, me! But that might not happen, either. Sigh (thrice). -JB

49 WildBlue Communications

Up, up, and away!

When WildBlue commercially launches satellite-delivered broadband services next year, it will be quite an accomplishment, in more ways than one.



For starters, it's using advanced Ka-band technology to deliver high-speed data services to areas still untouched by DSL and cable lines. In fact, when CED ran an interview with WildBlue CEO Thomas Moore in the September issue, we received e-mails from several people in "broadband-free" zones who literally could not wait another second to sign up with WildBlue. A good indication of pent-up demand.



But what's more surprising is that WildBlue is on the cusp of a successful commercial launch while many others, including several with much deeper pockets, never made it to that point. In 2000, WildBlue was just one voice among many in the next-gen satellite broadband arena, which at one time included names such as Teledesic, Astrolink and SkyBridge. Even Spaceway, Hughes' big broadband satellite play, has totally changed course. DirecTV will now use that spectrum to boost its HDTV offerings.

Even though other satellite broadband service providers have survived (StarBand, DirecWay), WildBlue claims to have an ace in the hole that will help the company keep costs way down: its technology is largely based on DOCSIS. -JB

50 Entropic Communications

Coax to the max

Upstart Entropic Communications is another chipmaker that hopes to play a key role as home networks evolve from a tool for simple connection sharing to one that ships and shares high-end audio and video.



Entropic's medium of choice is good ol' coax, which has weaved itself into tens of millions of homes over the years. Its aim is to deliver speeds up to 270 Mbps (headroom included), enough to deliver multiple streams of HD video.

At last check, Entropic's chipsets were already being used in a spate of trials, and its chipsets will reach commercial availability in 2005.

Entropic is the only silicon company so far to join the Multimedia over Coax Alliance (MoCA), a group that counts backers such as Comcast Cable, EchoStar Communications, Panasonic, Motorola, RadioShack Corp. and Toshiba.

So, it's in great company. -JB

