

IT



IPTV

1.

IPTV Internet Protocol Television , IP
 , IP (IP+ , DMB)
 . IPTV

(VoD), ,

IPTV

TPS(Triple Play Service:
)

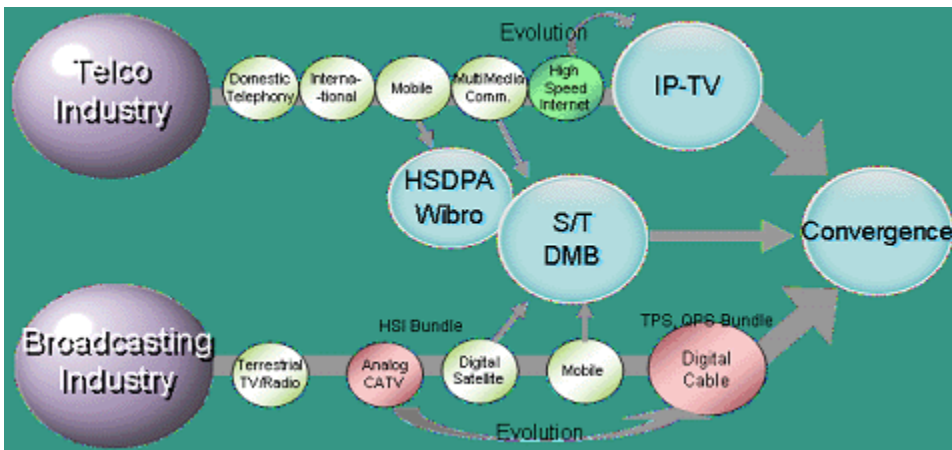
Walled Garden, VoD

가

PC

TV

가



(1) IPTV

* IITA

(042- 710-1380, email: bjmoon@iita.re.kr)

** IITA

A/V(Audio/Video)

OVUM IPTV IP (: xDSL, FTTH) VoD
 TV ITU-T “ IPTV
 is defined as multimedia services such as television/video/audio/text/graphics/data delivered
 over IP based networks managed to provide the required level of QoS/QoE, security,
 interactivity and reliability.” OECD Broadband Audio-
 Visual Service Internet Video, IPTV, Telco TV, TV over
 DSL, Broadband TV 가 .

2. IPTV

IPTV , , , ,
 가 . 1Mbps
 가 VDSL(Very high bit-rate Digital Subscriber Line), LAN
 100Mbps
 . HD VoD(Video on Demand) 20Mbps
 VDSL LAN
 HD .
 , IPTV
 , 가
 , 가
 IPTV
 . VoIP
 (Vocie over IP)
 ,
 가
 IPTV .

< 1> TV IPTV

	TV	IPTV
	(119)	(KT,)
	(77)	(VDSL 가)
	TV 50 , 20 , 15	TV 60~100
	가	가
가	- VoD - EPG - SMS	- VoD - EPG - , VoIP, SMS - TV - -

* FTTH: Fiber-To-The-Home , 가 (~가)
 PON AON , WDM-PON, GE-PON, G-PON
 * EPG: Electronic Program Guide(가)

IPTV

IPTV

(VoIP)

IPTV 가

A/S

IPTV

IP

가 가

PC

VoD, EPG, T-Commerce,

IPTV

VoD

TV 가

T-Commerce, T-Government, T-Learning

가

TV

가

, IPTV

TV

SD/HD

T-

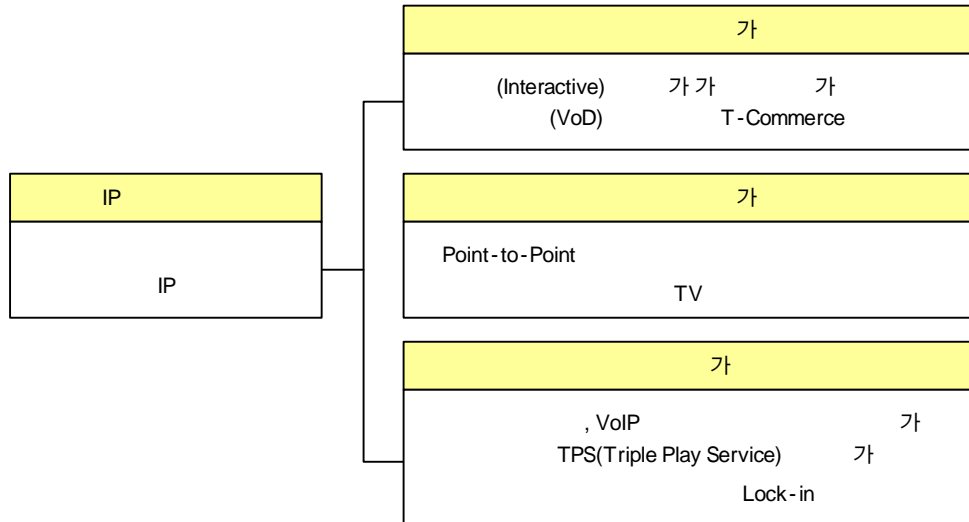
(,

,), T-

(, , T-

), T-

(, , ,



(2) IPTV

), T- (SMS, , ,), T- (, , ,)
 EPG, VoD, PPV, PVR

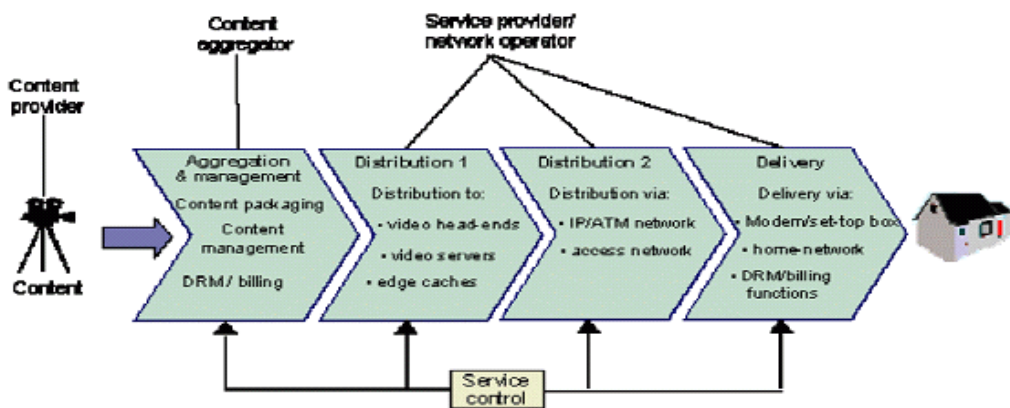
IPTV

Content Provider, Content Aggregator

가

IPTV

가



< >: OVUM, 2006.

(3) IPTV 가

Contents Aggregator 가

가

가

ARPU

가

CA(Contents Aggregator)

가

3. IPTV

IPTV

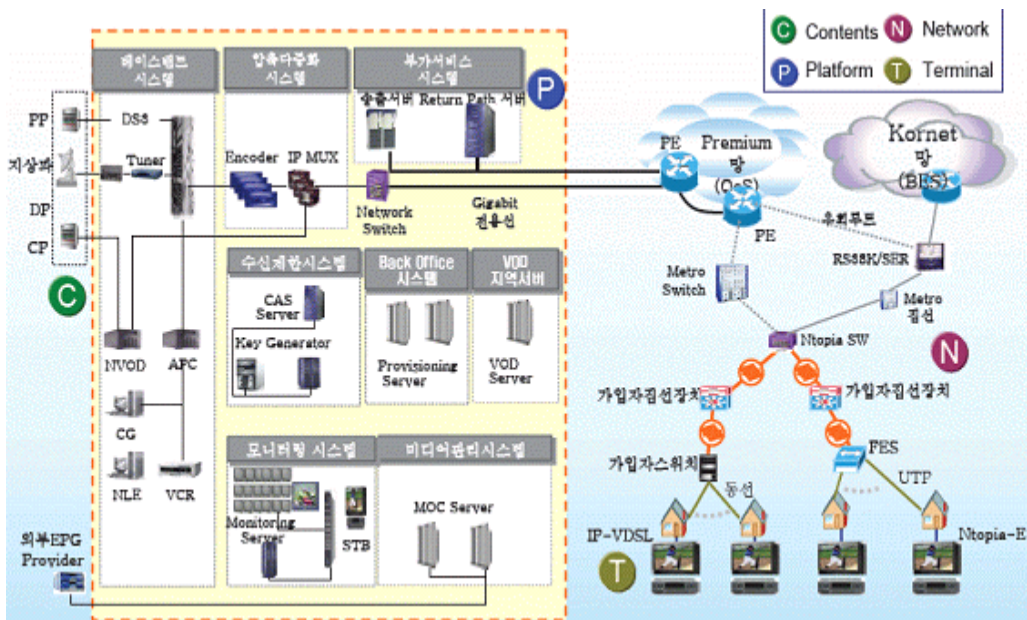
() IP

VoD

가

, VoD

VoD



< >: KT, 2006.

(4) IPTV

, QoS , 가

IPTV NGN(Next Generation Network) ADSL

VDSL xDSL FTTx

FTTH(Fiber To The Home) 가 , H.264

VC1 xDSL ,

ADSL2+ 2003 1 G.992.5 ITU-T 20M,

1Mbps , Triple/Quad Play 가

, VDSL2 long short G.993.2 2005 ITU-T

HDTV

IP IPTV

VC1 MPEG4-Part10(H.264/AVC)

VC1 SMPTE(Society of Motion Picture and Television Engineers) , H.264/AVC ITU-T ISO/IEC JTC1

가 JVT(Joint Video Team) 2003 . VC1

Windows Media9 MS-TV2 MS-DRM

H.264/AVC

MPEG2 . H.264 VC1

MPEG2-TS, SD 1~2M, HD 5~7Mbps , 가

, A/V 가

PSI/SI(Program Specific Information/Service

Information)

Open TV, Canal+ Technology, Liberate

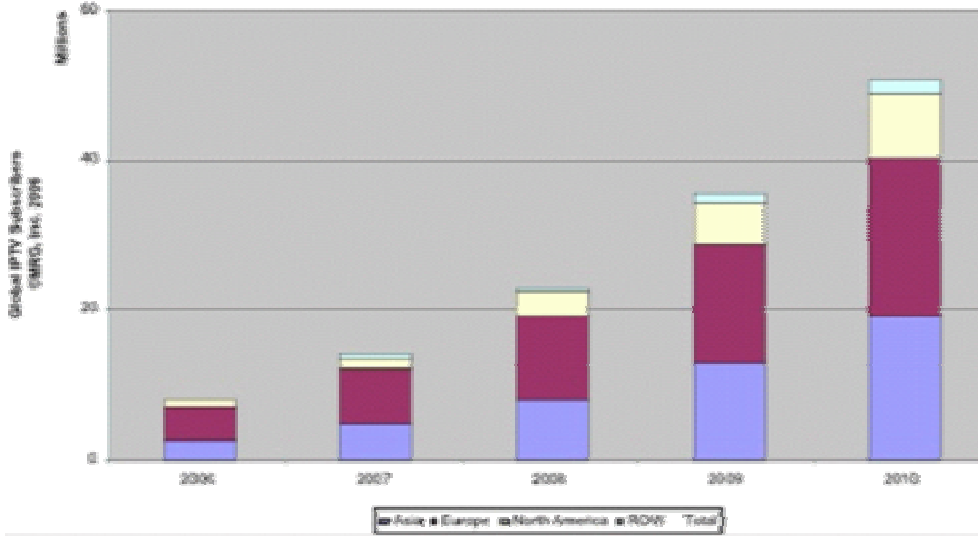
가
 ETSI()
 DVB-MHP, ANSI Cablelabs/SCTE(Society of Cable Tele-communications Engineers) OCAP(Open Cable Applications Platform), ATSC(Advanced Television Systems Committee) / ACAP(Advanced Common Application Platform)
 IP IPTV
 , IPTV
 AV

4. IPTV

DSL 가 가 HDTV 가 ,
 IPTV IPTV 가 ,
 가
 Informa Telecoms & Media IPTV ,

< 2> 가 IPTV

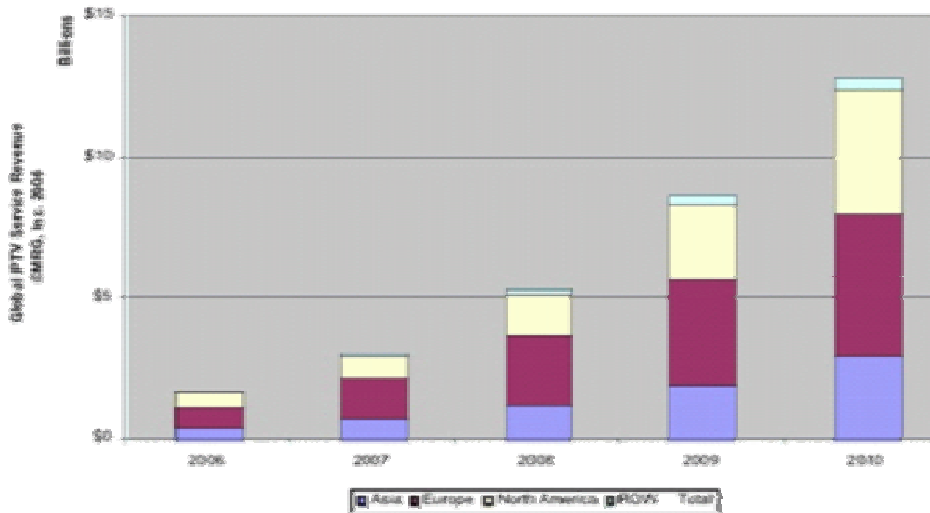
Gartner	2006	2006 320	, 2010 4,880	(가 72.8%)		
	2006	2007 가	가 2			
MRG	2005	370	, 2009 3,690			
	2005 8	8,800	, 2009 99			
IDC		2004 가	50 , 2009 2,000		3 가	
&	2007	6	, . 2010 10			
In-Stat	2011	3,900	, 81			
	2007	890	, 2010 3,780			
Dittberner Association	2013	5,300				
	2005	260	, 2010 1			
	2005 90	, 2010 1,650				
	2009	5,300				



ROW: Rest of the World
 < >: MRG, 2006

(5) Global IPTV Subscriber Forecast

IPTV 가 가 가 2011 3,600 가 가 2011
 TV 가 3.4%가 IPTV 가 가 , 2006 480
 가 가 IPTV 가 , 2005 250 가



ROW: Rest of the World
 < >: MRG, 2006

(6) Global IPTV Service Revenue Forecast

< 3> IPTV

	2005 3	2005 8	2006 2
	23	39	46
	49	58	87
	139	176	21
	12	14	24
	223	287	370

< >: MRG, 2006.

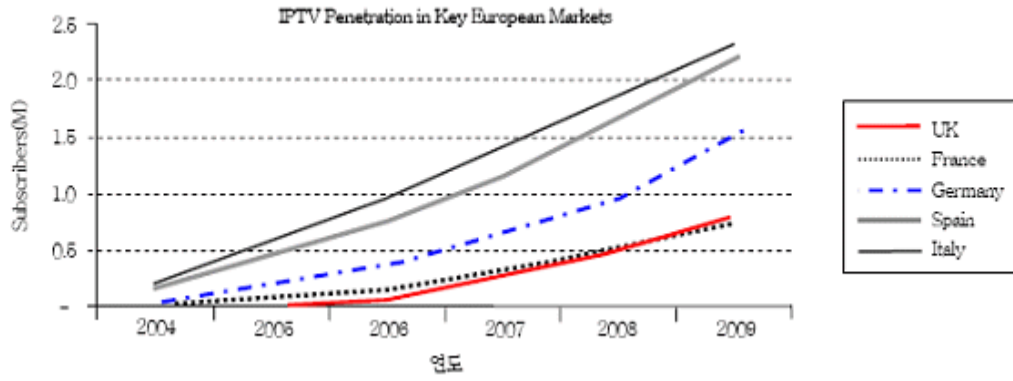
가 ,
 2005 IPTV 가 VoD 10 , 2011 122
 . 113 가 , 10 VoD

IPTV , , , , IPTV .
 Fastweb, PCCW 가 가 . AT&T

IPTV 가 .
 가 .
 PC
 TV
 PC TV
 가 TV

IPTV , , IPTV, DTT, IPTV
 , 2009 IPTV
 가 , TV 9.4% . IPTV
 , , 가 , 2009
 TV 20%, 17%, 16%

IPTV TPS ,
 IPTV MS , EU .



< >: OVUM 2006.

(7) IPTV 가

가

TPS IPTV

MS . EU

가

TV

IPTV 가 가 ,

가 가 IPTV

2010

In-Stat

가가 IPTV

IPTV In-Stat IPTV PCCW, , 가

가 ADSL, FTTH ,

가 IPTV

IPTV

< 4> 2005~2010 IPTV 가 가 (: 가)

	2005	2006	2007	2008	2009	2010	CAGR
IPTV 가 가	263	623	1,867	3,752	6,550	10,684	109.8%
TV 가 IPTV	0.2%	0.5%	1.6%	3.1%	5.3%	8.6%	

< >: Gartner, 2006.

IPTV

TV 가 가

. Gartner , 2005 26 3,000 가 IPTV 가 2006

3 가 가 62 3,000 가 가 , 2008 6 가

375 가 , 2010 1,068 가 가 2005 2010

TV 가 IPTV 0.2% 8.6%

IPTV 1,000 가 가

2006 7 CATV 가 가 9,510 가

(SureWest, SaskTel, MTS, Aliant, Telus, BCE)

FTTH/DSL IPTV 가 , 가

. 1996 CATV 가

가

2 Verizon 2005 FTTH

2005 9 'Fios TV' IPTV ,

2006 5 IPTV 24% . Verizon

, 2006 1/4 7

1 Comcast 2006 3 CATV, ,

TPS(Triple Play Service) , TimeWarner Cable, Cox Communication

2006

5.

가 가 ,
 IPTV . 2009 3,500
 , 250 가 가 .
 TV VoD 가
 . IPTV 1 , 가
 2 3
 . 가 VoD
 ,
 가 . , , , 가
 가 .
 , 가
 IPTV
 , , .
 , 가
 .