

Understanding the Digital World

Telecom & Over-The-Top



Net Neutrality

International benchmark: how are telcos, content providers & regulators positioning themselves

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- This document is a part of our "Telecom & Over-The-Top" category which includes in 2014:
 - 1 dataset in Excel, updated yearly
 - 1 state-of-the-art report in PowerPoint, updated yearly
 - 6 market reports in Word, each with its synopsis in PowerPoint
 - Privileged access to our lead Expert Telecom & Over-The-Top analysts

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- **IDATE Research**, an offer of market intelligence publications
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List of players studied

Country Players			
Australia			
ABC	iiNet	Optus	Telstra (BigPond)
Exetel	Internode	SBS	Vodafone
Free TV Australia	Ninemsn	Seven Network	
Canada			
Alliance of Canadian Cinema, Television and Radio Artists (ACTRA)	Canadian Gamers Organisation	Motion Picture Association of America (MPAA)	Shaw Communications
Bell Canada	CBC-Radio Canada	Netflix	Skype
BitTorrent	Google	Open Internet Coalition (OIC)	Vonage
		Rogers Communications	
France			
Bouygues Telecom	Free	Orange	Skype
Canal+	Google (YouTube)	PriceMinister	Skyrock
Cogent	NRJ Group	SFR	TF1
Dailymotion			
Germany			
O2	E-Plus	Kabel Deutschland	Verband Deutscher Zeitschriftenverleger
ARD - ZDF	Freenet	SoftEyes GmbH	Vodafone Germany
Deutsche Telekom	HanseNet	T-Mobile	
	Telekommunikation (Alice)		
Italy			
3 Italy	Mediaset	Telecom Italia	Vodafone Italy
FastWeb	Tele2	Telecom Italia Mobile	Wind
Japan			
au by KDDI	NTT	SoftBank	
KDDI	NTT DOCOMO	SoftBank Mobile	
Norway			
Mediebedriftene	NextGenTel	Schibsted	
Netcom	NRK	Telenor	
South Korea			
KT	LG U+	Samsung	SK Telecom
Spain			
Jazz Telecom (Jazztel)	Orange	Telefonica	Yoigo (Xfera Moviles)
Movistar (Telefónica from España)	Redtel	Vodafone	
The Netherlands			
KPN Mobile Netherlands	Tele2	T-Mobile Netherlands	Vodafone Netherlands
NPO			
UK			
3 UK	ITV	Skype	Virgin Media*
BBC	O2	TalkTalk	Virgin UK
BSkyB	Orange UK	T-Mobile	Vodafone
BT	PlusNet	UK Music	
USA			
Amazon	CTIA	MetroPCS	Time Warner
Apple	eBay	Netflix	T-Mobile
AT&T	Facebook	Qwest	Twitter
BitTorrent	Flickr	Skype	Verizon Communications
Comcast	Google	Sprint	Vonage
Cox Communications	InterActiveCorp (IAC)	Time Warner Cable	Yahoo!
Craigslist	Level 3		

2. Methodology & definitions

2.1. General methodology of IDATE's reports

The methods employed by IDATE's teams of analysts and consultants are based on an approach that combines:

- research and validation of data collected in the field;
- the application of classic industry and market analysis tools: segmentation, competition analysis, strategic strengths, modelling, assessment and forecasts...;
- the expertise of specialists who contribute their own analytical capabilities and those of their network of market analysts.

More specifically, the tools employed by IDATE's teams are as follows:

1/ A multi-disciplinary team of full-time consultants, specialised by sector of activity

IDATE's analyses are performed primarily by our in-house consultants, and very occasionally by freelance market analysts. This approach allows us to capitalise on our pool of expertise through teamwork, sharing knowledge, ideas, contacts, viewpoints and key data. Each report is drafted by a team of specialists, overseen by senior consultants with a proven track record in their field.

2/ Primary and secondary research

IDATE reports and databases are compiled based on primary data obtained from one-on-one interviews with the sector's decision-makers, and on secondary data which is established by cross-referencing public sources and external databases.

3/ An integrated information centre sustained by a number of tools and proprietary databases

Over the past 30 years, IDATE has established working and data organization methods and proprietary databases that trace the central chapters in the history of our sectors of expertise.

- **Companies:** IDATE's in-house data service tracks the latest news and events to come out of the top telecom, Internet and media industry companies around the globe. Innovative firms and start-ups are monitored by the market experts in the different "Practices".
- **Markets:** IDATE's databases are derived from rigorous processing of fundamental economic variables (GDP, investments, exchange rates, demographics, etc.) and their relation to decisive sector-specific and national elements (capex, national market dynamics, etc.).
- **Technologies:** IDATE's organization by Practice provides us with an efficient means of tracking innovation. IDATE's engineers ensure in-depth understanding of the changing shape of products and services and of the latest innovations in the marketplace.

4/ Contents of the published reports

Each IDATE market report details the structures and issues at play in the market being examined, the decisive forces (technologies, regulation, consumption) and the players involved. Particular emphasis is given to market assessments and forecasts, as part of the central premise. All market reports are laid out in a clear and concise manner, and illustrated with tables and graphs of key market data and trends.

The process of drafting of a market report includes the following stages:

- analysis of the information available in the in-house databases, and review of analyses performed in the recent past;
- based on a preliminary segmentation and assessment of the market, and as part of an validated interview guide, analysts conduct interviews that enable them to validate working hypotheses;
- a market model is then established, making it possible to test the hypotheses that have an impact on the market's development, and validated by a new round of interviews;

- and, finally, the report's conclusions are debated with the team responsible for the project and with expert consultants from the various fields involved;
- a final proofreading and editing/revision process, prior to the production of the final version of the report which is delivered to the client.

2.2. What is Net Neutrality?

Net neutrality is the principle whereby ISPs and governments should treat all data on the Internet equally rather than discriminating or charging differentially by user, content, site, platform, application, type of attached equipment, and mode of communication. There are a few cases for which all parties tend to agree on the need for some form of traffic management (like network security) but there are even discussions on the application of certain rules such as fighting against copyright infringement.