

The Broadband Properties 100

Our detailed look at the companies that are most likely to shape broadband deployments

The waiting is over. There's a race to bring more bandwidth to homes and small businesses. The headlong rush knows no national boundaries, and no technical boundaries, either. The "gold standard" is fiber to the home. In new construction, that's what we get. In overbuild situations, there is a mix, depending on geography and existing infrastructure. But without exception, the existing infrastructure is being tweaked for more bandwidth by replacing it with fiber that creeps ever closer to its final destination – your living room. The BP 100 companies make it happen. Without them, there would be no broadband revolution.

The BP 100 companies are a diverse group. Two are startups, just beginning to generate sales. The largest on the list is Verizon, which had revenue last year of \$71 billion and income of \$13 billion. The smallest had no revenue at all last year.

We sifted among more than 250 companies. Those that made the list share only one universal attribute: Courage. The industry, after all, has been attempting to bring massive broadband to the home for almost 20 years. Why is the effort succeeding now? Courage.

In this issue, we recognize the companies that drive the process, either by providing the technology, the implementation skills, the demand, or the vision. We do so in the hope that we can help the industry understand itself, and that we can help other interested parties – investors, public officials, and customers – climb aboard.

It starts with demand, and demand starts with content. You'll find many such companies among the BP 100. Some develop new programming. Some creatively package channel lineups. A few are exploring the gaming space and user-authored content. A few are pioneering ways that consumers can find content they crave, among all the offerings. What good is a soap opera in Portuguese, if you

can't find it and bring it to your terminal quickly, when you want to view it? Why should we settle for 2D screens displaying a 3D world? If you haven't heard about a service called Moxi, or a gaming environment called The Sphere, you'll want to check the BP 100 especially carefully!

Good content is enabled by good technology. We had our toughest moments choosing among technology providers. Our criteria included hardware innovation – ways to move bits faster and at less cost. It also included software innovation, especially software for network management, customer service and of course customer billing. Some products seem almost boring. What good is a mile of new fiber if the plastic box, where the fiber meets the home, leaks? How does the technician test a new installation in the field, cheaply, when the customer hasn't signed on yet? How do you dig the ditch? The BP 100 brings some of these enablers to the forefront.

We have a special section for some of the great distributors who make life easier by matching technology providers and users. All of the distributors on our list have taken risks stocking new fiber technologies. All offer strong tech support. They include AMT (www.goamt.com), DF Countryman (www.dfcco.com), Multicom (www.multicominc.com) and Toner Cable Equipment (www.toner-cable.com).

Good technology has to be implemented. The BP 100 includes construction and construction management firms

as well as system integrators who concentrate on broadband networks. The list has been growing of late.

Finally, somebody needs the vision – and courage – to put up the money. BP 100 highlights the top firms that do just that. Some, like SBC and Verizon, are of course household names. But what about home builders like Pulte (mainly building for ownership) and Roseland Property (rentals and ownership), who have successfully made broadband an integral part of their marketing proposition? And what about Zoomy, Ygnition, and Capitol Broadband (all on the list), who work with developers to bring broadband to customers? Missing from the BP 100 this year are many smaller telcos and cable operators, typically rural, who have recently started to offer triple play. We'll be watching them closely for inclusion next year.

Demand. Technology. Implementation. Vision. Courage. – Steven S. Ross, Editor-in-Chief

About the Authors

Robert E. Calem, noted technology writer and a frequent contributor to *Broadband Properties*, wrote most of the company descriptions. His work has been published in *The New York Times*, *The Wall Street Journal Interactive Edition* (WSJ.com) and *Crain's New York Business*, among other leading publications. He can be contacted at rcalem@optonline.net. Companies were selected by the staff of *Broadband Properties*. Fact-checking and additional research were handled by Rachel Ellner and the staff.

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