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Welcome to the Case Communications May News Letter. We have tried to keep the articles light and of general interest but, please feel free to contact Case marketing with details of any subjects or article you would like us to consider for inclusion in future newsletters.

Will the UK broadband Market follow the Korean and Japanese markets?

Korea and Japan are leading the world in the deployment of next-generation fixed and wireless broadband services. Will the UK follow suit or are the markets completely different?

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IPTV – Is the way we are going to receive our Television signals in the future, so what is IPTV?

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BT Business intend to launch an 8Mbps Broadband service on the 17th May 2006

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Skype (the Voice over the web firm) has recently unveiled a service for groups of up to 100 people to hold spontaneous conversations on line

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BT has announced that it is going to offer enterprises with a converged telephone service that combined fixed Voice-Over-IP (VoIP) and Mobile access, with access via a single phone.

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Will the UK broadband Market follow the Korean and Japanese markets?

Based on an Intellect report sponsored by the DTI Global Watch service. For the full report please visit <http://www.intellectuk.org/download.asp?file=585>

Korea and Japan are leading the world in the deployment of next-generation fixed and wireless broadband services. In 2002, a DTI Global Watch Mission visited Korea to understand how it had come to lead the world in broadband deployment. In 2005 a second mission provided an opportunity to follow up on that research and understand the impact that widespread deployment and take-up of advanced broadband services is having on the market for content, applications and services in Korea and Japan.

Executive Report

With their high population densities and ethnic homogeneity, Korea and Japan have been able to take advantage of economies of scale to encourage rapid take up of broadband and broadband-enabled services. The unique cultures of Korea and Japan have also shaped the demand for rich content. However, while these factors make these markets distinct from the UK, many of the lessons learnt from the mission usefully inform the UK, which faces a number of the same challenges and experiences as broadband-enabled technologies drive convergence.

Ambitious network solutions are being developed to deliver policy aims

Deployment of wired and wireless next generation technologies were seen to be vital to the achievement of both countries' ICT strategic objectives, and so operators have been encouraged to invest by suppliers, regulators and government despite apparently weak business cases to do so. This means that both Korea and Japan have increasingly advanced networks and high ambitions (in Korea 20 Mbps to all homes by 2006 and 50-100 Mbps by 2010, and in Japan 30 million FTTH connections by 2010).

Broadband is driving growth in the market for innovative rich content

While not as advanced as some in the UK may speculate, broadband is undoubtedly enabling noticeable growth in otherwise flat content, services and applications markets in both Korea and Japan. The established growth areas are similar to those in the UK: music, games and video-based services. Revenue is already significant, but online still represents only a small percentage of total markets in each genre, and so there is plenty of room for further growth.

Personalised and interactive community sites are also becoming increasingly embedded in Korean and Japanese lives. While this development is having an interesting effect on social interaction and information sharing, it is also proving to be rich ground for business. Companies have taken advantage of the strong appeal of these sites to generate income through micro-payments, and by extracting value from user-generated content, in addition to more traditional advertising, subscription and pay-as-you-go models.

Next Generation Networks are leading to disruptive convergence

Prompted by advanced networks, fierce competition and political encouragement, intense repositioning is taking place across the whole broadband value chain as players attempt to defend existing revenue streams and open up new ones, even if those new business models are as yet unproven.

In general, movements can be observed as being away from households towards individuals; from in-home to out-of-home consumption; and from mass to personal consumption. Fixed and wireless services are converging and new product developments, as well as partnerships, mergers and acquisitions were evidently taking place along these lines.

Convergence is a hot topic in the telecommunications and broadcasting markets

As new TV-like services emerge over platforms such as IPTV, VOD and Mobile TV. The imminent arrival of these services means that non-

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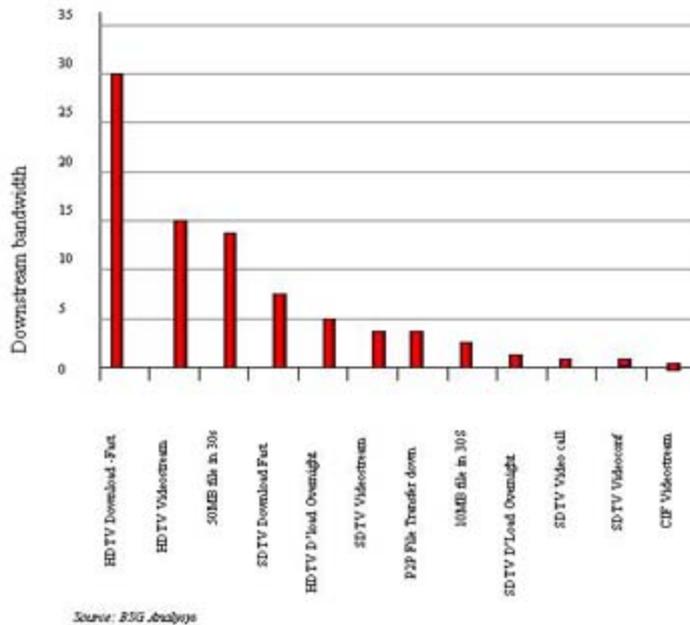
traditional broadcast companies are rapidly acquiring content through partnerships or buyouts, and existing broadcasters are seeking to innovate with their existing content and skills-base.

However, uncertainty surrounding the regulation of these TV-like services is slowing down deployment, meaning that they are not as advanced as other content genres, and that consumer demand is difficult to assess.

Access technologies

Access technologies are going to continue to multiply in the public broadband space. This will be heavily dependent on specific policy initiatives as well as economies of scale. However, to achieve these new long-term access technologies, both existing spectrum based technologies and their evolution and also the interoperability of new technologies with those that exist today are being considered.

The Table below describes a wide range of wireless access technologies that are being considered in Japan. Some of the frequencies under consideration would require international agreement to be implemented in



Europe.

Wireless

While xDSL and cable technologies make up the brunt of connections, technologies will have a much more pronounced role in the future. KT's Nespot (WLAN) service has built an extensive Wi-Fi access network around the country and continues to grow. Korea Telecom has announced that it will launch WiBro on a test basis to about 200 of its employees in Seoul. Competitively, the service will be pitted against SK Telecom's 3G mobile service, but SKT also eventually plans to launch WiBro.

WiBro (wireless broadband), is a wirelessbased technology being developed by the Korean telecoms industry. It uses the 2.3 GHz spectrum and can theoretically offer downstream bandwidth of around 3 Mbps. Initial field trials were producing speeds consistently around 1 Mbps. The technology will also offer quality of service which allows for WiBro to stream video content and other loss-sensitive data more reliably.

Digital Multimedia Broadcasting (S-DMB and T-DMB)

Satellite Digital Multimedia Broadcasting SDMB is a new business concept in broadcasting service to mobile. The service uses the 2.6 GHz radio frequency band. It consists of a large number of various multimedia broadcasting programmes, such as high-quality digital audio programmes, video programmes and also data transmission to be received by vehicular and small portable receivers in mobile environments. S-DMB services have been launched in Korea with 300,000 subscribers. S-DMB will be offered by NHK, the public broadcaster in Japan. A new terrestrial (T-DMB) service was also launched in Korea at end of November 2005.

Sensor networks & RFID

Ubiquitous sensor networks enable sensors to detect the status of people and objects and their surrounding environment, dealing with them in real-time through autonomous circulation of information between sensors. Through the development of this technology, it is expected that ICT support be strengthened in a wide range of social and economic activities, such as medical care,

welfare, crime prevention, security, disaster management and environmental risks. MIC (Japan) plans to undertake research and development in this area from 2005, thereby contributing to the creation of diverse applications and new services.

Consumer demand

Consumers are keen on having the latest technology in order to keep up with their friends, and the threshold for products to hit mass markets is therefore lower than in Europe. Services or technologies that reach 15 per cent penetration are well on their way to becoming mass-market products.²⁵ This also means that product or service life cycles can be shorter as consumers move on or upgrade to the next 'new thing'. By contrast, there is not a large market for pre-owned and second hand goods in Japan or Korea and online auction services have been slow to take off although auction sites, such as Itebay that trade virtual games items have been successful.

New Services

There are also many services (also beginning to be introduced in the UK) which are yet to fully take hold. For example, the large-scale impact of new 'IP and Mobile TV services' has not yet been felt in the market, as these services are still in their infancy. However, there is a very high degree of interest in the commercial potential of these services to deliver personalised, on-demand content to the consumer. Operators are competing to secure content rights and in some cases acquire content assets. As we will see in the following pages, the key drivers and enablers for growth in these online/mobile content, applications and services include:

Online games

Games companies have been at the forefront of innovation in the digital content market for many years and have been very successful in exploiting the potential for online and mobile distribution and game playing. In Korea, the video games market is predominantly PC rather than console-based and Korean companies pioneered the market for Massively Multiplayer Online Role Playing Games (MMORGs), such as NCSoft's Lineage, where hundreds of thousands of players can co-exist in a virtual world. As well as exploiting basic subscription, pay-as-you-go, and advertising business models, games companies pioneered the 'ItemsSelling' business model, where users can play games for free but are encouraged to buy items to personalise their 'avatars' or games characters. To do this, access to very low cost micro-payment systems was essential. Profits from items and avatars for the Japanese company Namco exceeded profits from online subscription games services by twelve times in 2005. Games companies have also been quick to recognise the potential of developing community-type services for their players that not only allow them to meet and chat online, but also provide targeted channels for e-commerce.

Music

Strong demand for indigenous music content in Korea and the early deployment of commercial music download services has meant that domestic companies dominate the Korean online music market. A range of services exists that allows customers to download or stream music to a variety of fixed and wireless devices. The mobile operator SK Telecom has developed a particularly successful service called Melon. According to analysts, 5 million music downloads to mobile phones are sold every day in Japan and 99.8 per cent of music downloads are to mobile phones and 0.2 per cent are to PCs and portable MP3 players.³¹ However, global brands such as iTunes are becoming more evident. Operators such as KDDI are actively developing their own music services for both PCs and mobile phones. KDDI has started selling the 'MUSIC-HDD' mobile phone with a built-in 4 Gigabyte hard disk drive (HDD), which can store approximately 2000 songs or 18 hours of 15 frame/second QVGA movie video. The MUSIC-HDD phone has as much memory as the top-end iPodNano, and with its new 'LISMO!' music service KDDI clearly aims for the same market as iPod/iTunes. LISMO! integrates an internet music store for PC downloads, with PC music management software, and music phones. Key to the success of music downloading in both markets is workable payment and security systems.

Community/social networking services and user generated content

One of the most notable developments evident on the mission was the growth of community or social network sites (SNS). MIC Japan estimated that there were four million users of Social Network Sites in Japan in September 2005. However, this figure may underestimate the extent of the use of such services as they become increasingly diffused. Approximately 50 per cent of daily hits to the Livedoor portal (Japan's third largest portal) are to its community sites. Livedoor offers these sites free to the user by allowing advertising on the sites. But they also offer chargeable services that give higher community functionality such as increased personal storage. User generated content, especially in the form of blogging, is also rapidly expanding. There were 7.7 million bloggers in Japan in September 2005. Not only are broadband users sending and receiving digital photos or movies that they have taken, but blogs are being used as forums for

uploading creative work for others in the community to critique. Using broadband for this form of creative development offers a huge opportunity for users to seek advice both nationally and internationally from more experienced creators in their fields. Discussions with students at the WAO Creative College also demonstrated that blogs are being used for e-learning purposes.

IP - Television

The convergence of telecommunications and broadcasting was perhaps the most discussed subject on the mission. The intense debate centred around how new IPTV, VOD and Mobile TV services will evolve and the impact that they will have on traditional broadcast services, which are, at the same time, moving towards full digital distribution and high definition (HD).

A variety of different models for new personalised, interactive, on-demand TV-like services are being developed by fixed and mobile operators, ISPs and broadcasters, based on a range of different technologies, platforms and devices. However, widespread service deployment has been delayed due to: regulatory uncertainty; negotiations over online content distribution rights; merger and acquisition activity; and uncertainty about the strength of potential business models. As a result IPTV, VOD and Mobile TV services are only just emerging and many are still in their trial phase making it difficult to assess consumer demand and to predict which services are likely to prove most successful.

How much bandwidth will we require?

The table below provides an indication of the bandwidth requirement for typical applications in use during 2005.

| Category | System | Outline | Frequency Allocation Planned | Transmission Speed expected | Service Area Coverage | Transmission Distance |
|------------------------------|-------------------------------------|---|------------------------------------|-----------------------------|--------------------------------------|-----------------------------|
| 4G | Mobile | IP-based | 800Mhz 1.7Ghz 20Ghz 50Ghz | 100 Mbps | Countrywide | - |
| Mobile MAN | WiMAX | IEEE E 802.16e | 2-6Ghz | 75Mbps | Metropolitan Area | 2-3Km |
| FWA (Fixed Wireless MAN) | WiMAX | IEEE E 802.16, 16a, 16d | Under 3.5Ghz | 10-100 Mbps | Countrywide & Bullet Train | - |
| FWA | Long Distance using Milliwave | - | 60 - 80 Ghz | - | Metropolitan and Rural Areas | 2-3Km |
| Wireless LAN | Nomadic Wireless broadband | Based on IEEE 802.11 | 5Ghz | 100 Mbps | - | - |
| Broadband For Transportation | Broadband for rail | Based on IEEE 802.11a | 5Ghz | Max 36Mbps | Between train and ground | 1 Km |
| Broadband For Transportation | ITS | Comms Between vehicles dedicated short range | 5.8Ghz 60Ghz 76Ghz | 100 Mbps | Between Vehicles | 10-200m |
| Satellite Broadband | 45 / 40 Ghz for disaster prevention | Satellite Comms using portable equipment to send images | 45/40Ghz | 1.5 - 155 Mbps | Between Site & Satellite & ground | Between earth and satellite |
| Satellite Broadband | Marine | Internet access for ships | C:5712Mhz Ku:12-18Ghz | - | Between Ships Satellite & ground stn | Between earth and satellite |
| Satellite Broadband | WINDS | Satellite Comms equipped with multiport user, Ka-band wide phased array antenna | Ka-Band Ka:27-40ghz | 155 Mbps | Everywhere in the hemisphere | - |

Mission conclusions

The overall impression gained from the mission was one of two countries that have taken the decision to invest heavily both publicly and privately in a sector that, for a variety of reasons, is seen as vital to the future economic and social health of their nations.

To date, this investment is reaping encouraging rewards and there is nothing to suggest that once regulatory barriers are overcome and new business models for emerging services are established, growth and innovation will not continue.

Indeed, both countries may well be approaching the convergence tipping point that will propel them rapidly towards what they have termed the 'Ubiquitous Networked Society', but others may simply call the future. However, success to the scale of the investment currently being made is by no means guaranteed and so two key questions remain: can the same advances be made with less investment or are the negative consequences of not having a highly advanced ICT-enabled society in an ever more competitive global market place too great to risk not taking a leap of faith?





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Technology Overview from Rogers Engine Room - IPTV

IPTV (Internet Protocol Television) describes a system where a digital television service is delivered to subscribing consumers using the Internet Protocol over a broadband connection. This service is often provided in conjunction with Video on Demand and may also include Internet services such as Web access and VOIP where it may be called Triple Play and is typically supplied by a broadband operator using the same infrastructure. Perhaps a simpler definition would be television content that, instead of being delivered through the traditional format, is received by the viewer through the technologies used for the World Wide Web.

In the past, this technology has been nearly impossible with slow dial-up download speeds inhibiting any form of video content to be received. Now, however, IPTV is expected to grow at a brisk pace in the coming years as broadband is now available to more than 100 million households worldwide. Many of the world's major telecommunications providers are exploring IPTV as a new revenue opportunity from their existing markets and as a defensive measure against encroachment from more conventional Cable Television services.

Architecture

IPTV has two major architecture forms: free and fee based. As of January 2006, there are over 1,200 free IPTV channels available. This sector is growing rapidly, and major television broadcasters worldwide are transmitting their broadcast signal over the Internet. These free IPTV channels only require an Internet connection and an Internet enabled device such as a personal computer, iPod, HDTV connected to a computer or even a 3G cell phone to watch the IPTV broadcasts. In December 2005, independently produced mariposaHD became the first original IPTV broadcast available in an HDTV format. Various web portals offer access to these free IPTV channels. Some cite the ad-sponsored availability of TV series such as Lost and Desperate Housewives as indicators that IPTV will become more prevalent.

Because it uses the Internet and sends less information than standard analog or digital television, IPTV promises lower costs for operators and lower prices for consumers. Using set-top boxes with broadband Internet connections, video can be streamed to households more efficiently than current coaxial cable. AT&T and Verizon have both upgraded or plan to upgrade their networks with fiber-optic technology to bring higher speeds across their networks. In addition to higher speeds, Digital Video Recorders (DVR), such as TiVo, will be able to record multiple programs at once and improve current program guides.

Protocols

IPTV covers both live TV (multicasting) as well as stored video (Video on Demand VOD). The playback of IPTV requires either a personal computer or a "set-top box" connected to a TV. Video content is typically MPEG2 Transport stream delivered via IP Multicast, a method in which information can be sent to multiple computers at the same time, with the newly released H.264 format thought to replace the older MPEG-2. In standards-based IPTV systems, the primary underlying protocols used for IPTV are IGMP version 2 for channel change signaling for live TV and RTSP for Video on Demand.

Currently, the only alternatives to IPTV are traditional TV distribution technologies such as terrestrial, satellite and cable TV. However, cable can be upgraded to two-way capability and can thus also carry IPTV.

Another alternative is (Video on Demand VOD). VOD in the the US is usually delivered over cable TV using the DVB protocol and is not labelled as an IPTV service.

Advantages

Advantages of IPTV include two-way capability lacked by traditional TV distribution technologies, as well as point-to-point distribution allowing each viewer to view individual broadcasts. This enables stream control (pause, wind/rewind etc.) and a free selection of programming much like its narrowband cousin, the web.

Triple Play is an expression used by service operators describing a consumer package including telephony, data and video. Offering tripleplay on a broadband connection requires the use of IPTV and IP Telephony (Voice over IP, VoIP).





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The gender divide as seen through the shower curtain

It can be a refreshing splash in summer, and a luxurious warmup in winter.

Roper Public Affairs and Media of the USA conducted a survey of over 1,000 adults 18 and older and asked them about their shower habits. The Key finding? Women take longer, for one thing, often staying in for 10 minutes. Many women find this to be a nurturing place of escape.

"Taking a shower is a legitimate excuse for women to be alone, to check out and not be held accountable," And yet, women cannot seem to escape completely. Even while under the relaxing spray, women said they often thought about their fitness flaws and chores they had to do.

Men are more businesslike. They get wet, get clean, get out, get dry and get dressed. What do men think about in there? "Sex and work" the report found. "Men shower when they need to and stay only as long as necessary."

The last gender difference in the shower, was the while more men face away from the nozzle, most men face towards it.

Asked which celebrity they would most like to shower with, most men chose Angelina Jolie. Most women chose George Clooney. "Men's fantasy woman is one who looks hot and excludes sexuality, why women chose Clooney, because he was sexy, funny and protective" the report disclosed.



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BT Upgrade Broadband Customers to 8Mbps

BT have announced that they plan to upgrade their ADSL service to 8Mbps from the 17th May.

Existing BT customers will be able to regrade to 'up to 8 Mb' broadband soon after launch. In the next day or so, existing customers will receive an email with details on how they can register their interest in upgrading to the 'up to 8 Mb' service via an online page. Once 'up to 8Mb' is available for upgrades, an email will be sent out to those customers that have pre-registered to inform them that they can now regrade their speed. To begin with, upgrades to up to 8Mbps speeds will only be available to a limited number of customers and therefore comms to pre-registered customers will be staggered. Customers will then be invited to place an online regrade order and, if necessary, upgrade to an 8Mb-compatible router

BT Have issued the following answers to F.AQ

What will 'up to 8 Mb' broadband cost?

The pricing for BT Business broadband products will remain the same as the existing products - it is just that it is 'faster speed'.

Are there any extra costs to upgrade for existing customers?

Regrades will be free, but a 12-month minimum service term will apply from the agreed activation date.

What if I want 'up to 8 Mb' broadband from BT Business now?

BT suggest that customers purchase Business broadband from our current portfolio now and then regrade to 'up to 8 Mb', at no extra cost, when it becomes available. (Standard regrade rules apply)

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Skype unveils a service for groups of 100 users

Skype has already signed up 100million users and is adding 200,000 new users a day according to a Reuters article, which went on to say Skype is previewing a shared communications service called 'Skypecasts' along with an upgrade to its core Skype software.

Skypecasts are live, moderated discussions that allow groups of Skype users anywhere in the world to discuss shared interests, from classes to computer support to cultural or political debates. They amount to the conversational equivalent of Web blogs, complementing the written interactions of blogs. "To date users have been talking one-to-one and one-to-many in private settings," Saul Klein, Skype's head of marketing, said in an interview of Skype's current services.

"Skypecast is about starting to have conversations in public settings." The service is moderated by a designated host who is able to pass a virtual microphone to participants in the group when they wish to speak. To keep conversations on track, the software allows the moderator to silence or eject detractors.

The social networking trend grew up out of the online dating scene with the rise of Friendster and has evolved as the power of collaborating with one's friends and acquaintances has been applied to everything from music to news to Web search. Skype takes the concept of social networking literally, based on the recognition that buddies on the phone or in an instant message chat are one's social network in a real sense.

Coming from a different starting point is MySpace, which began around the same time as a music fan site, but has grown into a broad-based media distribution platform for its owner, Rupert Murdoch's News Corp.

"The whole idea of talking on Skype is based around actual social networks -- one's address book of contacts," Forrester Research analyst Charlene Li said. The lines between Internet media sites and communications companies such as Skype are increasing blurring as both types of companies offer an increasingly similar set of features. "There is this natural inclination by big communications giants to want to be the focal point for the user experience, the starting point, the way to search the Web, and not just an instant message or voice communication tool," Li said.

Hosting or participating in a Skypecast is completely free. The feature is in preview mode, said the Luxembourg-based unit of online auctioneer eBay Inc.

Skype is working with several Web community services including Six Apart, the San Francisco-based blogging software maker, as a way for bloggers to create an interactive way for their audiences to hold open conversations online.

It is working with OpenVC, a European business networking site, and Bebo.com, a dating network site popular with British youth. Bloggers can schedule Skypecasts and link to them from their sites, so visitors using Skype can click to join discussions instantly, without leaving a blog site. Skype is also set to introduce version 2.5 of the Skype software, with a grab bag of new features, including giving any Skype user on a computer or phone the ability to send text messages directly to mobile phone users, Klein said.

"Skype is trying to really fix a few of the things that maybe the novice doesn't instinctively understand," he said.

On Monday, Skype had said it was furthering its push into business market through a partnership with speakerphone maker Polycom Inc., which plans to offer a handheld-sized Skype speakerphone for travelers that runs off a laptop and costs \$129 -- the low end of speakerphone pricing.





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BT Announces trials of telephone service combining VoIP and Mobile Access

BT has announced that it is going to offer enterprises with a converged telephone service that combined fixed Voice-Over-IP (VoIP) and Mobile access, with access via a single phone.

BT claims that its so-called fixed-mobile convergence (FMC) plan will enhance productivity and reduce costs for large businesses, as it will allow the use of a single phone, and phone number.

Francois Barrault, president of BT International stated 'We will use our knowledge and experience to ensure that this new innovative service will reduce the complexity of communications, whilst also improving employee effectiveness and business productivity' BT said that the system will combine VoIP carried by wireless broadband systems and Wi-Fi both within the enterprise premises and at public hotspots that it operates.

The converged service will also include cellular voice access and will use phones that can access both modes of service. BT expect to conduct live trials starting in 2007.



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BT to choose its own prices for business customers

Ofcom want to allow BT to choose its own prices when supplying products to its business customers. The regulator said that BT should not be obliged to publish its prices for business customers as this could stifle competition.

The plan offer a significant concession to BT and will enable BT to undercut its competitors such as Cable & Wireless. It could create even more pricing pressure in the competitive market. Ofcom emphasised that the proposals, which initially would be limited to customers who spend more than £1 million a year with BT, would be introduced only when the former monopoly had fulfilled certain obligations, such as ensuring that's its wholesale products et Ofcoms requirements.

Ofcom also stated that it would remove the regulation only after it had consulted BT's rivals. BT. However will not be permitted to drop its prices beneath a certain level.



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One Third of European Adult Population Browse the web for answers to health problems.

In 2005 at least one third of the European adult population, 130 million EU citizens, browsed the web in search of information on health. However, searching for health-related information is not always easy.

Researchers can be confronted with thousands of sites, many of them complex, and it can be hard to know which are reliable or up to date. To help European citizens answer their health questions, the Commission has today launched the "Health-EU Portal".

The launch event took place in Malaga, Spain, within the Commission-sponsored "eHealth" conference. The Health-EU Portal is a gateway to simple and sound information on 47 topics that range from babies' health to bio-terrorism, and from infectious diseases to health insurance.

It is aimed at citizens, patients, healthcare professionals and scientists alike.

Health and Consumer Protection Commissioner Markos Kyprianou said: "The Health-EU Portal is a very large project bringing together all EU Member States as well as EFTA[1] nations, international organisations and NGOs. Web surfers will have access to over 40,000 links to trustworthy sources. The translation of the Portal into all 20 official EU languages means that up to 1.5 billion people worldwide can use it to help them to make healthy choices



In this Issue:

IT profession confers with industry and government

[Will the UK broadband Market follow the Korean and Japanese markets?](#)

The first conference to address the creation of a broadly acknowledged and respected IT profession has been held in London. ProfIT 2006, hosted by an alliance of the four key bodies that support the IT sector – the British Computer Society (BCS), Intellect, e-skills UK and the National Computing Centre (NCC) – will seek to push the IT profession into a new realm of qualified excellence on par with established chartered professions.

As IT systems become both integral and vital to business and society then so has a growth in their reliance on a new breed of IT practitioner able to design build, deliver and safeguard systems that will meet budgeted expectations. Unfortunately this reliance has been coloured with an equal growth in public mistrust due to multifarious professional failings.

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Starting with the agreed premise that "a professional is a practitioner who has specific skills rooted in a broad base, has appropriate qualifications from a recognised body, undergoes continuous development and operates to a code of conduct", ProfIT 2006 will seek to address and then move the new shared vision and purpose from the conference's four working partners into deliverable and perceivable results.

One particular concern to be addressed is that approximately 1 million IT practitioners are currently working in UK organisations of all kinds yet scarcely 10% are members of a professional body or engaged in formal continuous professional development schemes leading to recognised and relevant qualifications.

[The gender divide as seen through the shower curtain](#)

Even more worrying is that feedback from employers and IT practitioners has confirmed that today's qualification regimes are not fully relevant to current needs and the support for personal IT professional development even more inadequate. The challenge is therefore to make IT qualifications more relevant and to attract the other 90% of IT practitioners into the world of continuous professional development from the beginning.

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A feasibility study around this qualifications regime, commissioned as part of the professionalism programme prior to the ProfIT 2006 conference, indicates the need for:

- An open structure which allows for a variety of entry points into the profession
- An overarching cross profession qualification structure organised around and covering all disciplines within the IT profession
- Intermediate or sub qualifications within this structure to support IT Practitioners at all stages of their career

An open Chartered Qualification regime also based on IT disciplines. Similar to the core approach used by a number of other professions.

- Clear mapping to a common IT Competence Framework to make it easier for individuals and their employers to establish what minimum qualifications they need to do a defined job or role with confidence.
- A range of training and education products within each section of the structure all based on a common learning outcomes specification
- The buy in of all professional bodies to developing, maintaining and supporting this common structure

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This study also highlighted as a priority, the need to define a Core Body of Knowledge that all IT practitioners must have to ensure that they are able to work effectively with other IT and business colleagues and to enable them to recognise the limits of their own professional competence.

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First effects of the Telewest merger

NTL is to cut 6,000 jobs, with 80% going within the next twelve months following its merger with Telewest.

Telewest is to close its head off and half the jobs which were duplicated when the firms merged will be axed will be outsourced, as part of a restructuring plan aimed at cutting costs by at least £250 million by the end of 2007.

The job cuts are the first stage of the cable companies' integration, and critics were questioning whether the combined company could carry off the integration successfully.

"The big question is, can it complete the mergers, transform the business into quad-play and make a quantum improvement in customer service all at the same time," said Angel Dobardziew, senior analyst at Ovum.

The job cuts were revealed at the same time as NTL's first quarter results. Pro-forma business revenue dropped 1.5% on the quarter, due to a reduction in so-called 'project revenue' - the provision of LAN and WAN infrastructure to corporates.

"Business voice and data services remains an extremely challenging market," the company said.

"We believe we are well positioned for long-term growth, with a lower unit cost than our competitors and a position that is enhanced by the scale benefits of the merger."

But it added, "However, the fluctuating nature of our project business will make revenue growth in the next quarter challenging."

Burch said on Tuesday that NTL would rebrand as Virgin early next year, following NTLs purchase of Virgin mobile shortly after its merger with Telewest

