



INSIDE:
**Becoming an
IPTV operator**

Benefits of IPTV

Content delivery with IPTV

Convergence of content

Guidance for interactive content

IPTV technology

Is IPTV the future of television?

The IPTV World Forum March 2008

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about IPTV.



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WHAT CAN IPTV OFFER ME?

By Jamie Beach, Editor of ipTV News www.ipTV-news.com

Few countries in Europe and further afield have missed the recent emergence of IPTV services, which are being offered by telecoms companies as an alternative to other pay TV services such as satellite and cable. The reason for this is fairly simple – revenues from voice services have been declining for a while and subscribers have been defecting to other operators, leaving traditionally strong telecoms companies more vulnerable.

CABLE TV PROVIDERS, such as Virgin Media here in the UK, have been seeking to add voice services to their packaged bundles of TV and Internet access for a while - and now telecoms companies are moving in the opposite direction to offer TV services. As they offer more services, telecoms operators hope to count on greater customer loyalty and higher average revenue per user (ARPU).

In highly developed markets, such as Asia, this is leading to truly converged services being offered by cable and IPTV operators, allowing them to deliver such features as Caller ID on the TV screen, family member locator (done via maps on the television through mobile phone technology) and place shifting (where a TV program is carried from the in-home digital video recorder on to a mobile device such as a phone for watching on the daily commute). We probably won't see these kinds of services in the UK for a while yet, but they hint at bigger things to come if the market proves receptive.

IPTV VS. INTERNET TV

Few Internet-savvy consumers can have failed to notice the meteoric rise of Internet TV services such as Joost. These enable consumers to watch TV on their PC or laptop, and differ from IPTV services in a crucial way – they are delivered over the open Internet, which means it is much harder to guarantee picture quality. By contrast, a telecoms firm such as BT has control over the transmission quality of its network infrastructure, and can offer its customers firmer guarantees about the picture quality of its TV services.

We spoke to BT, Tiscali and Orange to gain an insight into their IPTV services (BT Vision and Tiscali TV have been available in the UK for a while now, and Orange plans to launch their service later this year), and ask how they plan to expand these services in the future.

“A GREAT WAY TO GET DIGITAL TV” – MARC WATSON, COMMERCIAL DIRECTOR OF BT VISION

BT Vision was launched in May last year and has gone on to record considerable subscriber growth in a short period of time, with over 150,000 installed customers using the service according to latest figures. The service offers the Freeview channels,

including Setanta Sports, plus a large library of on-demand programmes and films, as well as time-shift capabilities through the free Digital Video Recorder (DVR) included with the service. High definition content will be offered later this year.

IPTV NEWS: WHY DID BT DECIDE TO LAUNCH A TV SERVICE?

BT had been working on the service for a considerable time before its nationwide launch in May last year. We were seeing increasing convergence of the TV and telecoms industries, around the world, with pay TV operators in the UK such as Sky moving into the telecoms arena. Offering our customers a digital television service was a natural step for us to take.

WHAT ARE THE KEY FEATURES OF BT VISION FOR CONSUMERS?

It's a great way to get the best of digital TV, and a digital recorder is also included in every box, allowing consumers to store 80 hours of content recorded from the Freeview platform at the touch of a button. The BT Vision Box connects to a BT broadband line and also allows customers to access over 7,000 programmes on-demand, with full DVD-like functionality of rewind, pause and fast forward. Within this library there is a fantastic range of the most recent and classic movies, music and TV programmes, as well as extra



MARC WATSON, BT VISION

ipTVnews

interactive features such as games. The service also offers flexibility in how customers pay for content – there are no minimum fee contracts for content packages, if they wish customers can just choose to pay for the odd Saturday night movie for example, as it suits them. And the box itself is free to BT Broadband customers. Customers love the on demand service – we recorded over a million on demand views in December alone.

HOW DO YOU PLAN TO EXPAND THE SERVICE IN THE FUTURE?

It's easy to get over excited with the possibilities offered by IPTV. We want to get the basics right first – which means our aim is to offer a first class customer service, make the service simple and pleasurable to use and offer increasingly compelling content and services, at great value. We also seek to offer our customers a service which is genuinely different and innovative – as shown by the recently announced deal with Microsoft that BT Vision will be made available on the Xbox 360. When coupled with the BT Vision Box, Xbox 360 users will also have access to multi-room functionality [where content stored in one room on the BT Vision V-Box can be viewed on a TV via an Xbox 360 in another room]. We are looking at offering a fully integrated home media experience – meaning our customers can access their media content and services wherever and whenever they want across all devices, and Caller ID on the TV screen is on our roadmap.

“TV THAT YOU WANT, WHEN YOU WANT IT” – TIM PEARSON, DIRECTOR OF DIGITAL TV FOR ORANGE UK

Orange has already launched its IPTV service in other European countries such as France and Spain, and is preparing to enter the UK market this year. France Telecom, which owns Orange, recently announced that it now has over 1.243mn customers for its Orange TV service in Europe.



TIM PEARSON, ORANGE UK

IPTV NEWS: WHAT WILL MAKE IPTV AN APPEALING SERVICE FOR CONSUMERS IN THE UK?

The UK television landscape is developing as Digital Switchover approaches. Consumers are becoming more sophisticated and as a result, there is increased consumer awareness and uptake of multi-channel TV, digital TV recorders, IPTV and video on demand (VoD). Digital TV from Orange will allow customers to get all the flexibility and control of the Internet on their living room TV: "TV that you want when you want it", an appealing proposition for our customers.

WHAT CAN CONSUMERS EXPECT FROM ORANGE'S NEW IPTV SERVICE?

Digital TV from Orange will provide a wide and compelling range of content and channels, from free-to-air channels (including BBC digital channels, Film 4, More 4 etc), as well as dedicated video on demand film and TV libraries.

In July 2007, Orange announced a multi-year video on demand deal with Disney-ABC International, and in December of last year we also announced a multiyear agreement with MGM to provide the studio's latest feature film releases and classic movies from the MGM library to Orange's customers, and we continue to negotiate content in the UK as well as via the France Telecom Group content division.

With a strong heritage in entertainment and content delivery and partnerships with BAFTA, Glastonbury and recently the Rugby World Cup – sponsorships that have their own unique content that can be merchandised for Orange customers across a number of platforms - Digital TV from Orange will deliver a compelling proposition to UK consumers.

WHEN WILL IT BE AVAILABLE?

Digital TV from Orange is currently being trialled by existing paying broadband

customers and we are planning a full UK rollout of the service later this year.

"BREADTH OF CHOICE" – JONATHON SYKES, MANAGING DIRECTOR OF CONTENT STRATEGY FOR TISCALI TV

Tiscali TV offers up to 80 broadcast channels, including Freeview and subscription channels such as Sky One, Sky Movies and Sky Sports, as well as a large library of on-demand content. The service recently achieved nationwide availability, with over 10mn households now capable of receiving Tiscali TV.

IPTV NEWS: WHEN WAS TISCALI TV LAUNCHED?

Tiscali TV started off as an IPTV video on demand business in the London area under the guise of Homechoice. It was a very cutting edge service for its time, and the business was purchased last year by Tiscali. The main point is that it offers a seamless integration of broadcast television and video on demand, with the objective of offering customers what they want to watch, when they want.

WHAT ARE THE ADVANTAGES OF IPTV FOR CONSUMERS COMPARED TO OTHER PAY TV PLATFORMS SUCH AS CABLE?

Well if you take the movie genre for example, for film fans we can offer Sky Movies, plus our PictureBox service, which offers a choice of new movies on-demand, and more are being added all the time. We aim to offer customers a new release as soon as it enters the pay per view window, and currently have over 1,000 movies on-demand. So the strength of IPTV is that it offers breadth of

choice – you can get a lot more of what you want, when you want, with IPTV.

For music fans you can choose your own music videos and create your own playlist, or even your own TV channel, which is a very powerful thing to do with music. Also we can use viewer choices to inform of what other people are watching, suggesting new music that they perhaps might not have heard of yet.

We also have a children's TV channel called Scamp, which has no adverts and uses a video-based electronic programme guide (EPG) to allow children to change between Postman Pat episodes, for example, by themselves in an easy and fun-to-use format. Watch this space as we're going to be producing a lot more video EPGs.

HOW DO YOU PLAN TO EXPAND THE SERVICE IN THE FUTURE?

We're launching new services all the time for Tiscali TV, and work is never ending on the functionality side - the important thing is that we look at what consumers want.

HOW DO YOU SEE THE UK'S IPTV MARKET DEVELOPING COMPARED TO THE REST OF EUROPE?

You have to remember that the UK is a very different market to other European countries: we have two broadcasting colossuses here, the BBC and Sky, both of which are fairly excellent at what they do. Every other TV provider is seeking to establish and sustain themselves in an ever-changing landscape.

There is a buoyant and exciting market in the UK however, and as long as we [Tiscali TV] maintain to be innovative and consumer-centric, we will do well.

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JONATHON SYKES, TISCALI TV

IPTV: THE TRUTH

When I was asked to write this article, I assumed that people, in general, at least had a vague idea of what internet protocol television (IPTV) actually is. However, since researching outside of the inner echelon of IPTV aficionados (both in business and social life), I have ascertained that the majority simply just do not 'get' it.

IF YOU ARE in the dominant percentage that believes IPTV is 'internet TV' (e.g. Joost, YouTube, et al) and are currently sticking your hand in the air going, "Me! Me! I know what it is!", then read on carefully.

MIND YOUR IPS AND TVS

IPTV IS NOT 'internet TV'. Internet TV is internet TV and IPTV is internet protocol television. So, what does this mean in simple terms? If one looks at the actual words, it makes more sense. Firstly, 'internet TV', by definition, is 'content' which can be watched online, on computers (or, in certain cases, on mobile devices and gaming consoles). Internet protocol television, however, is television content which is delivered via internet protocol, but is, or at least can be, watched on television sets; in addition to being viewed on other devices.

I recently had a conversation with an 'internet TV' channel, during which the client kept repeating, mantra-like: "We are IPTV! We are IPTV!" because said client had a section of the website on which content could be played. After about twenty minutes of this, realising that anything I said was either (a) falling on deaf ears and/or (b) being drowned out by the "We are IPTV!" chant (which, incidentally, also offended me on a grammatical level), I decided to be magnanimous and make allowances for those who have not yet been properly educated in all things IPTV. However, continued reading of this article will ensure you end up in the higher echelons of 'those who do' and thus be able to impress/annoy your friends and colleagues

with your IPTV pedantry.

In a recent interview with journalist Philip Hunter for IPTV News magazine, David Wray, co-founder and director of UK-based IPTV specialist, Global Digital Broadcast Ltd (GDB), explains: "It is important to remember that IPTV stands for internet protocol television, i.e. the content may travel over a broadband line, but it does not stop at the internet, the computer, or at a mobile device. People tend to concentrate on the 'internet' part, whilst neglecting the 'television' aspect. Global Digital Broadcast has spent years developing IP set-top boxes which enable IPTV on television sets and that is true IPTV."

So, to recap thus far, (true) IPTV is internet-delivered content which is then played on television sets and, again by definition, the fact that the content travels via internet protocol also means that internet functions (such as web browsing and accessing/using email accounts) may also be implemented on television sets.

"D-D-D-D-DIGITAL"* - MAX DELIVERY TO YOUR LIVING ROOM

THE PENDING DIGITAL switchover is changing the way we are going to be receiving television content and, of course, this has given the broadcast industry a spectrum of marketing toys to play with. The largest broadcasters are leaning towards triple-play packages (i.e. bundling services such as telephone, broadband and digital/satellite transmission), each promising their way is the way forward and will deliver the

very best, highest-definition, fast-forward-rewind-pause-play-record-watch-ten-channels-on-split-screen-all-at-once service.

To listen to the hype and marketing psychobabble which surrounds the IPTV debate, it would sound as though they are also offering what the industry likes to call an IPTV 'solution' – a term which makes didactic PR copywriters want to start ranting about "homogenous molecular mixtures of two or more substances." However, no matter how loudly certain broadcasters shout "We are IPTV!" or similar, it is interesting to note that no-one else, currently, other than the aforementioned GDB, seems to have been able to actually create the homogenous molecular alchemy which takes the IP and adds it to the TV, thus creating the all-elusive IPTV.

IP networks already exist in the majority of countries across the world, thus giving IPTV its global phenomenon status and this international aspect is, more correctly, verified by the fact that internet protocol content may be transmitted to and from any and every country which has a broadband connection. To date, GDB has two existing international network partnerships, SuncasTV (America) and Via America (Europe and territories outside of the USA), which transmit 'true IPTV', i.e. via broadband connection to set-top box.

The UK IPTV network, under the PlayTV UK brand, is already rolling out, with an estimated 100,000 set-top boxes to be installed, in homes around the country, within the next 12 months.

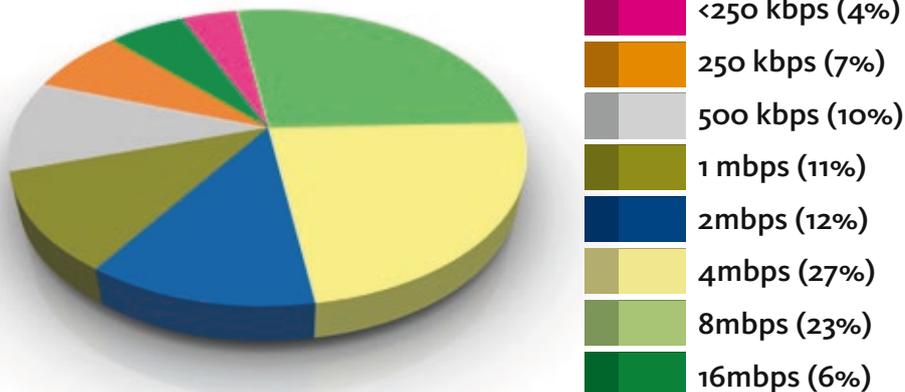
BROADBAND - AN "UP TO" DATE DEBATE

FOLLOWING THE BROADBAND speed "up to" debate at the end of 2007 and its, somewhat negative, consumer-targeted 'investigative' media; statistic and analysis authority, Point Topic, released the latest DSL access speeds available to UK households, along with the suggestion that the contested "up to" was replaced with "at least".

The report reads: "At one end of the scale it is about how the UK will get access to the very high data rates which most experts agree we are going to need one day. At the other end it is about the speeds ordinary end-users can actually get right now."

Whilst an informed consumer knows the actual working download speed depends on their geographical distance from the serving exchange, many people became disillusioned with, and confused by, ISP claims such as "up to 16 megabits."

DSL access speeds available to UK households*



*Source: Point Topic

Illustration by Simon Gray - simon.gray@gdbtv.com

According to Point Topic, who set out to discover who can actually get what and where, the "at least" figures (as shown) are actually rather healthy; especially when one considers that a mere 1Mbps plus is recommended for IPTV transmission. In fact, current figures from the Broadband Stakeholder Group state that 99.6% of the UK is actually capable of 2 – 10Mbps of broadband, despite there only being a 52% take up on the provision (although this figure is rising).

Furthermore, analyst company Canalys indicates 39.6 million worldwide subscribers by the end of 2010. This will be a tenfold increase, growing from fewer than 4 million in 2006. These figures provide an undeniably positive indication to IPTV development as a majority broadcast system.

PUNK PROTOCOL - ROCK THE SPINE OF BROADCASTING

JIM DEANS, co-founder and managing director of GDB, explains: "IPTV is, quite simply, the most powerful tool the media has ever seen. Every human being will adopt IPTV for what it can do for both business and for the ordinary person. IPTV is new age television – adopt video over the net; build your own TV channel; create your own schedule; select pages in advance ... the consumer is given the power to watch what

he wants, when he wants. Like punk rocked the music industry in the 1970s, IPTV is rocking the spine of broadcasting today."

The impact of IPTV on media businesses, such as the entertainment, music, sport and publishing industries, is obvious. Indeed, even Warner Brothers has indicated that the lifespan of DVDs is coming to an end and Michael O'Hara, general manager of Microsoft communications, is quoted as saying (of IPTV): "The transformation of the media and entertainment industry and the introduction of a new digital supply chain make software platforms and solutions essential to the success of media businesses."

IPTV is also a highly-lucrative option for companies and individuals in a multitude of other trades. In fact, the accessibility and appeal of IPTV is so comprehensive and inclusive, that practically any individual and/or organisation can now broadcast their own channel, whether it be niche/community and/or conventional/global.

Perhaps the most notable effects of IPTV will be seen in the advertising industry (streamed and/or downloaded content is exempt from certain regulations) and the education sector. The education aspect, in particular, is one of distinguished note. GDB is now offering its software (middleware) to schools, colleges, universities and even charities, across the UK; in order to

facilitate a new media training curriculum and therefore create a new generation of IPTV broadcasters.

Jim Deans concludes: "As far as the education sector is concerned, we intend to provide media students with the training they require in order to become part of the phenomenon that is true IPTV."

THE REALITY – TALENTED TV

SO, THERE WE HAVE IT – the truth about IPTV. Don't believe me? Then you can either email me directly for a jolly old dual; or you can take it from the über-evangelist of all things tech himself, Microsoft's Bill Gates: "We predicted at the beginning of the decade that this would be the decade that the digital approach would be taken for granted ... now, there's a generation that can go even further as we get more video-on-demand capability and literally anybody can watch any show at any time, even the ads can be targeted to you. We call that IPTV."

Copyright Jules J. Foreman, February 2008 (jules@gdbtv.com)

* *Quote from Max Headroom*

• **For further technical information on IPTV and IPTV services provided by Global Digital Broadcast, please visit <http://www.gdbtv.com>**

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IPTV BRINGS THE BENEFITS OF INTERNET ADVERTISING TO TELEVISION

Television is a powerful medium that has become a part of our life. From the Queen's coronation in 1953 to Jade Goody's dethronement during Big Brother, television provides common points of reference that we all share.

JUST AS MUCH as the programming, advertising is a part of this shared heritage. Do you remember the Cadbury's Smash Martians? Do you recognize the phrase *Vorsprung durch Technik* - even if you don't know what it means? There's an element of nostalgia in our memories of TV ads, but the fact that we remember them is testament to the impact of television.

Research shows that our love affair with the telly is far from over. We watch an average of four hours every day - ten minutes more than in 1997. Yet behind that extra ten minutes lurks a conundrum.

We watch more television because we have more channels to choose from. Just one commercial channel 25 years ago, compared with up to 400 today. This extra choice has fragmented television audiences, making them more difficult for advertisers to reach. In an age where the advertising industry's collective mantra is "return on investment", some predictions about the future of the classic 30 second ad spot have become rather gloomy. Compared to the metrics now offered by the Internet, some believe that television isn't accountable enough and that with the arrival of personal video recorders - if the hype is to be believed - no one is watching the ads anyway.

Certainly television has some catching up to do. But the reality is that TV advertising is far from dead and has a happy future to look forward to. While the media has focused on the phenomena of Facebook, MySpace and YouTube, a quiet revolution has been taking place: Internet Protocol Television - IPTV for short - has become a mainstream video delivery platform.

IPTV does exactly what it says on the packet: it delivers TV via your telephone line to the television in your living room using Internet Protocol - the same technology that drives the Internet. IPTV has many advantages, but particularly exciting for advertisers and broadcasters is the ability for one advertising spot - also known as an "avail" - to carry multiple ads from different advertisers to



different audiences at the same time. Those ads are fully addressable and can be targeted at viewers on the basis of lifestyle or location, providing advertisers with the control and accountability they have come to expect from the Internet. It enables the broadcaster to further monetise its ad avail without upsetting the current structure of the commercial break, and means that viewers receive ads that are relevant to them.

This might sound like something for the future, but it is happening today. A UK-based company called Packet Vision is rolling out a targeted advertising service over IPTV in France, Spain and the US. And for brands wishing to reach university students, Packet Vision already offers a fully operational service, helping TV channels to deliver targeted ads to students in

university accommodation across the UK.

If IPTV sounds a little too niche, it's worth bearing in mind that subscriber numbers in Europe are at critical mass, with 2 million households served in France alone, and major television brands already engaged in targeted addressable advertising. IP as a means to deliver video is here to stay. It is being fitted retrospectively into cable systems, and it powers web TV and mobile TV. Those broadcasters and advertisers that learn how to capitalise upon IPTV now will be well placed in the near future, when media begin to converge and the dream of "anytime, anyplace, anyhow" becomes reality.

Exactly when this will happen remains to be seen, but what is clear is that television and the Internet will be the primary engines of advertising growth in 2008, and that by bringing the functionality of the Internet to television IPTV will help improve television's share of advertising revenue.

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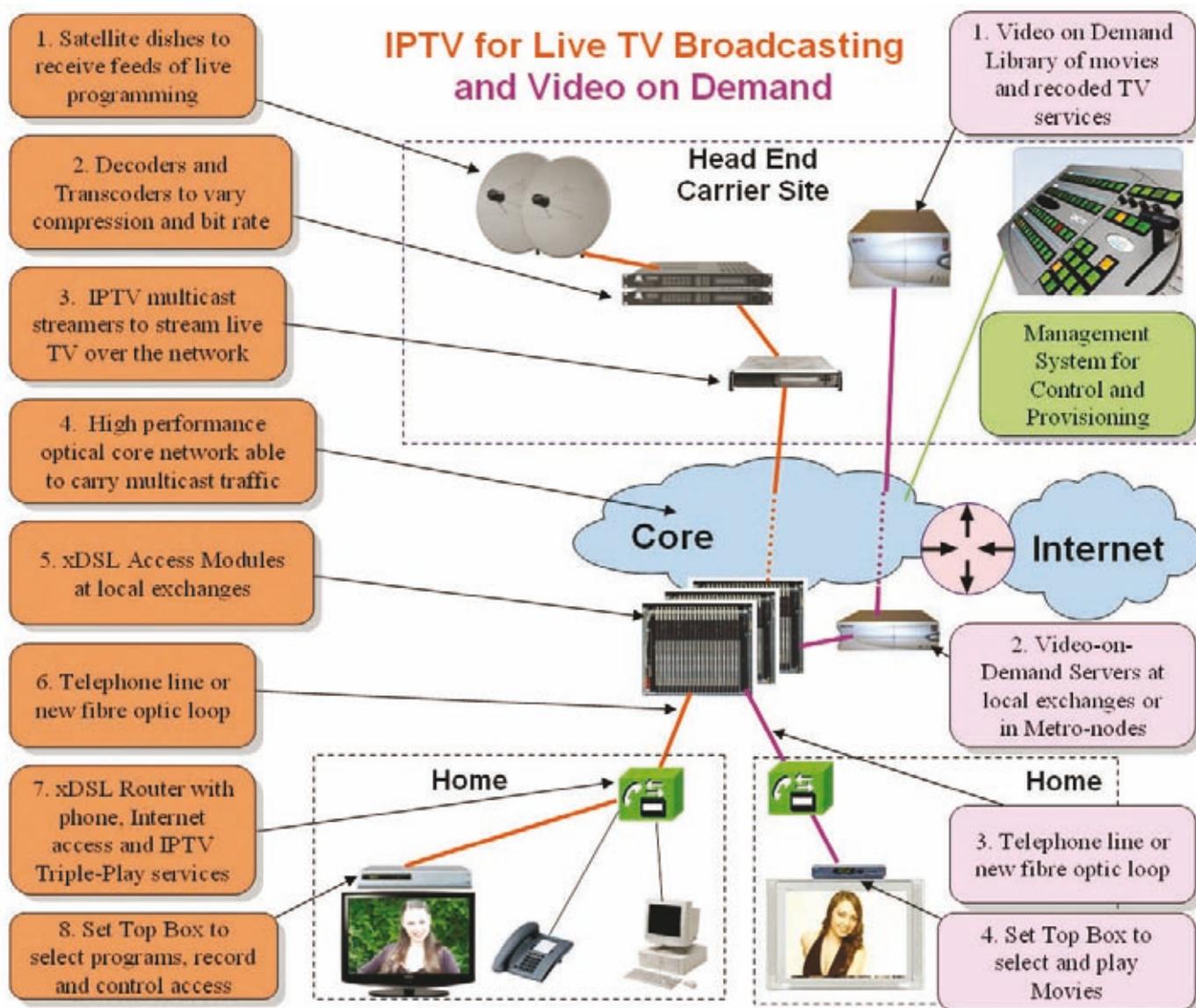
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AS BROADBAND PENETRATION

continues to rise exponentially so does the popularity and consumption of IPTV, with analysts predicting that over 400 million people worldwide will be taking advantage of the benefits of television delivered over a broadband connection by 2010.

Most people believe that IPTV is exclusively for consumer use, for watching the latest film, downloading a missed episode of a favourite soap or catching up on the latest news. So the mere mention of the word IPTV in a business context is enough to make any manager or CEO wince, as they visualise staff sitting at their desk watching TV all day.

But this not the case, the use of IPTV in a business environment can be a valuable asset to any enterprise, in any industry. By simply using an Ethernet network in conjunction with a network IPTV solution such as Exterity's, companies large and small can stream live TV as well as any multimedia content to any end point in a building or across a campus.

Companies such as QVC, SAB Miller and Reuters are all maximising their existing IP infrastructure to deliver TV to break-

out areas and foyers, to stream company training around a building and to distribute video content to any desktop, plasma screen or laptop, helping to improve internal communications, contributing to staff welfare and improving the overall atmosphere of a building.

Within the hospitality industry, hotels and hospitals are reaping the benefits of using their existing network to stream TV and multimedia content, which previously required an extensive and expensive coaxial system. Hotel visitors can now access a larger variety of films and TV via the internet and hospital patients can make their stay more pleasant by passing the time with bedside TV, all delivered via an IP connection.

And it's not just the business world that can take advantage of network IPTV. Educational establishments around the world are waking up to the benefits that internet-based TV can bring for students and teachers. Universities and colleges such as Matthew Boulton College in Birmingham, Lewisham College in London and Voyager Academy in Portsmouth are giving students access to foreign language TV, sharing video



content and making educational resources available through any IP connection, regardless of location or time.

• **For more information please visit www.exterity.co.uk or contact Eric Beattie, Product Marketing Manager on +44 1383 828251.**



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