



“How Netgem TV has become the leading UK independent aggregator TV platform with Freeview Play and HbbTV?”

24th of November 2021

# “How Netgem TV has become the leading UK independent aggregator TV platform with Freeview Play and HbbTV?”

- What is Netgem doing now?
- How Netgem TV has become our innovation vehicle
- The consumer challenge and the opportunity in the UK market
- Our Netgem TV service embracing Freeview Play & HbbTV
- Our product and distribution in the UK
- Our plans for the future



# Netgem: 25 years experience in making great TV for viewers around the world, and a **strategic presence in the UK** moving from 'Box' to 'TV Service' model

## Netgem in key figures:

Founded  
in  
1996

30M€  
turnover

30+ Telcos  
customers

10M+  
deployed  
IPTV  
devices

5M€+  
R&D  
/ year

3.5M+  
active  
users



## Continuous Hybrid-TV innovations in the UK

2000

The first IPTV Set-Top-Box 'On Digital on ITV Digital'



2008

The first Freeview PVR connected set-top-box - 'Fetch TV'



2014

The first set-top-box with mobile multiscreen and flick-to-TV on EE TV



2015

'Turning 40+ OTT applications' into 400+ channels on EE TV



2017

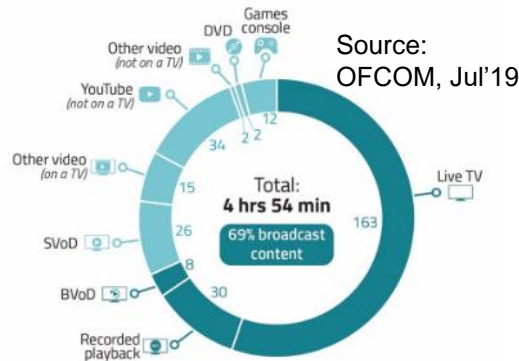
The first Alexa voice controlled set-top-box in the UK on EE TV



2018 onwards  
Netgem TV service  
(UK devices)



# Netgem TV has been designed to cater for both growing UK Consumer trends: Embracing the strength of UK Broadcasters with the OTT Streaming services and FAST Channels: all-in-one-place!



2020



## BBC licence fee paid by 250,000 fewer people

Matthew Meier, Media Correspondent  
Tuesday September 15 2020, 5.05pm  
The Times



Use of iPlayer has risen but some are content to limit their viewing to on-demand services such as Netflix, it says.

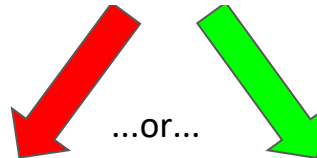
75% of TV viewing is on the main channels...but declining:

## The way we watch...how TV habits are changing

By Cyril Dixon  
A THIRD of TV viewers now watch their favourite shows online, a study reveals.  
More of us are switching from traditional "pay TV" deals to streaming platforms on the web, it was found.  
One in five people who has subscription TV deal also stream extra content, and platforms such as Netflix and YouTube are now as common as Sky, BT and Virgin Media packages.  
The poll of 2,000 adults found that viewing habits have changed noticeably in recent years, with a third of all television watched being streamed online.  
The research also found that many viewers typically have access to a

highlighted the rise of online streaming.  
Sylvain Thevenet, netgem.tv managing director, said: "The findings show the extent to which the dominance of the traditional pay TV provision has been disrupted by cheaper pick and play online services.  
"The advent of free or affordable streaming services poses the question, why would anyone pay for expensive TV bundles which cater for one taste?  
"Perhaps people used to make sure of the TV channels they were buying.  
"But now our evidence shows that most people only watch a fraction

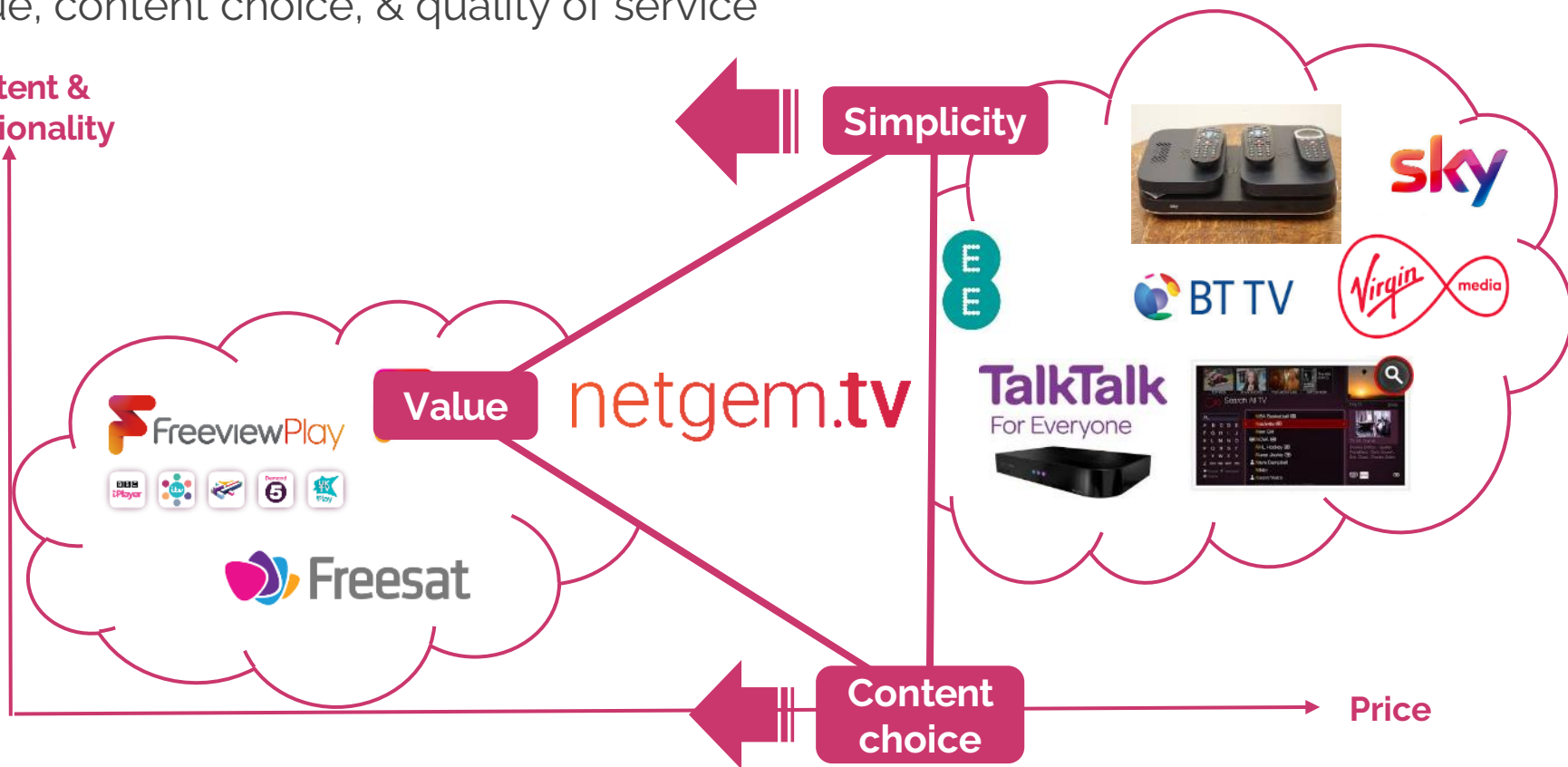
available to them - and therefore are paying for channels they are not using.  
"People are paying too much for TV which doesn't cater to their taste.  
"The way we will see a day in the future when we turn around and say: "Can you remember when we paid £70 a month just to watch TV?"  
"With digital, on-demand offerings it's now possible for every stratum of the family to enjoy TV personalised to their taste.  
"And that is at a time, which suits them, on any device, and not having to pay for channels you don't want.  
"The days of channel hopping are well and truly over."



# The 'best of free TV' and the 'best of Pay TV'

Value, content choice, & quality of service

Content &  
Functionality





# Leading UK innovation with **HbbTV** & **Freeview Play** at the heart:

*From a Broadcast friendly box to a Broadcast friendly service...*



## First UK Super-Aggregator

**2014:** EE TV is 1st to combine DTT & OTT linear, CUTV, PVR + VOD in the UK - with Mobile Apps viewing too



## Prime & Alexa, first in Europe

**2017:** Netgem is 1st to launch Amazon Prime Video & TV box control via Voice Alexa skill.



## First SoundBox with Freeview Play

**2018:** Netgem is 1st to create a combined soundbar + smart box form factor with Freeview Play



## "Best Freeview Play box"

**2019:** Netgem Netbox HD wins the 'Expert reviews' competition for its simple rich-UI and great value product



## Personalised discovery (award) across 4K OTT + DTT

**2019:** Universal Search across Netflix, Youtube, Amazon, iPlayer, all in UHD & HDR and with Dolby Atmos!



## Best value 'Pay-TV lite' service: 200 channels + 40 Apps





**2020:** 1st Freeview Play TV service to launch BritBox, 35 On-demand Apps, and 200+ channels (incl. 80 FAST)



"Best interactive TV application"



## Only £10 per month, with Freeview Play catch-up and pay-as-you-go options

				
Content included	<b>200+ channels</b> <b>Incl. Premier sports (worth £12.99)</b> <b>50,000 hours of on Demand</b>	<b>180 channels</b> <ul style="list-style-type: none"> <li>- Sky one etc</li> <li>- Discovery, History, MTV etc</li> </ul>	<b>100 channels</b> <ul style="list-style-type: none"> <li>- Sky one etc</li> <li>- Discovery, History, MTV etc</li> </ul>	<b>80 channels</b> <ul style="list-style-type: none"> <li>- Sky one etc</li> <li>- Discovery, History, MTV etc</li> </ul>
Content Add ons	<b>40+ apps</b> including Prime Video, and 10+ totally free	<b>15 apps</b> Nothing free - <b>No Britbox</b>	<b>7 apps</b> Nothing free - <b>No Britbox</b>	<b>15 apps</b> Nothing free <b>YT kids etc</b>
Box and mobile TV	<b>4K / HDR</b> definition Worth £149 Award-winning Voice Control with <b>Alexa</b> <b>WiFi</b> - no need ethernet Universal search and personal recommendations <b>Unlimited</b> mobile/tablets	Sky Q 4K / HDR Dish required (not weather proof) No WiFi <b>Sky Go extra: £5/m and 2 devices only</b>	V6 Box 4K / HDR No Voice Control No WiFi 2 cumbersome apps (one to view, one for remote!) <b>2 devices at one time only</b>	Youview HD - so old you can't open the apps properly No Voice Control No WiFi <b>2 devices at one time only</b>
Price	<b>£10/m</b> no upfront	<b>£25/m</b> £20.00 upfront	<b>£25/m</b> £35 upfront	<b>£12/m</b> £29.99 upfront

# Our 'Super-aggregator' service in the UK

Bringing the best content together with simple discovery!



## What is THE super-aggregator?



1

### **All the content in one place (content unification)**

No more fragmentation: netgem.tv brings together the best programmes from Freeview TV and popular streaming services in one place, so everyone can find something to watch.



2

### **Simple discovery = The "best & freshest" shows (recommendations)**

With more shows than ever comes the challenge to find the winning choice. Our universal search A.I. engine and our dedicated content team curate & bring together the "best and fresh" content across all providers.



3

### **True 'myTV' (relevant personalisation)**

Personal recommendations, watchlist, recordings, regional selection (top 10 in ...).



# Our 'Super-aggregator' service in the UK

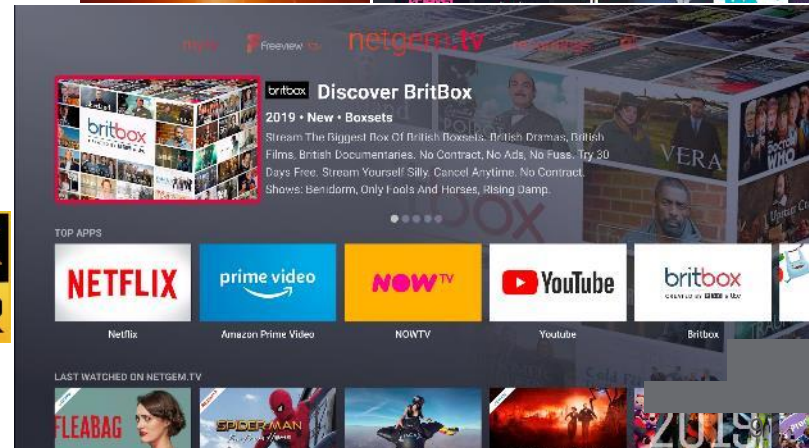
Bringing the best content together!



1

**All Freeview channels (HD)**  
**+ All the Catch-up from the UK Broadcasters**  
**+ OTT IP channels**  
**+ the top OTT players in 4K UHD**  
**...always up-to-date!**

- ✓ DVB-T2 Tuner
- ✓ IP channels over Wi-Fi
- ✓ UK PSB Players (iPlayer, ITV Hub, All4, My5)
- ✓ UKTV Play, Netflix, Prime Video, Now TV, milkshake!, s4c, Pop
- ✓ YouTube, britbox
- ⇒ Disney+, Peacock, HBO Max (ready to implement)
- ✓ TVoD / EST
- ✓ 4K / UHD (OTT)
- ✓ Audio – support Dolby 5.1 / Digital Atmos
- ✓ **Connected Red Button Service2**



# Our 'Super-aggregator' service in the UK

The "best & fresh" shows, easy to find!



2

## Simple & rapid discovery

- 'direct programme access'
- traditional EPG
- Search
- Mobile 'cast'
- 'Voice control'



Our awarded UX

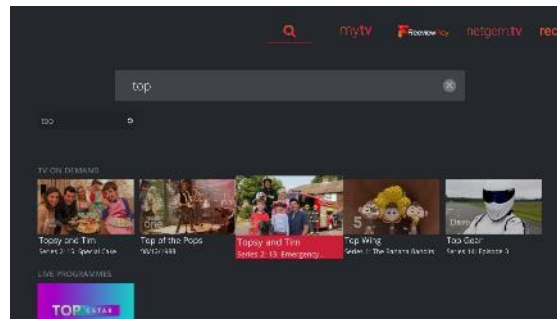
Works with Alexa & Google Voice

Universal search

Find & Cast from mobile

- ✓ Pause & Rewind
- ✓ Expandable storage
- ✓ Recordings
- ✓ EPG
- ✓ **Audio EPG**
- ✓ Universal Search
- ✓ Parental control
- ✓ Payment Pin
- ✓ Near Field Voice Integration
- ✓ Far Field Voice Integration
- ✓ **Restart** via Green button

HbbTV



## Truly 'myTV' (relevant personalisation)



# 3

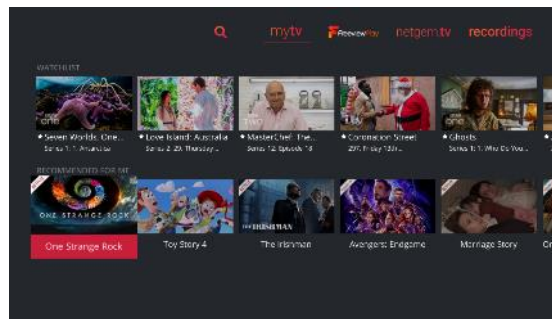
**'myTV'** brings relevant content to the TV viewer & **notifications** drives engagement.

- ✓ First Time Install – customisations
- ✓ Notifications
- ✓ **Watchlist** / bookmarking
- ✓ Personalisation
- ✓ Multiroom\*

*\*Supports both Multi-device and multiroom*

## + Recommendations by

- ✓ Most popular
- ✓ Favourite genres
- ✓ Partner content feeds
- ✓ Editorial



myTV



## Notifications

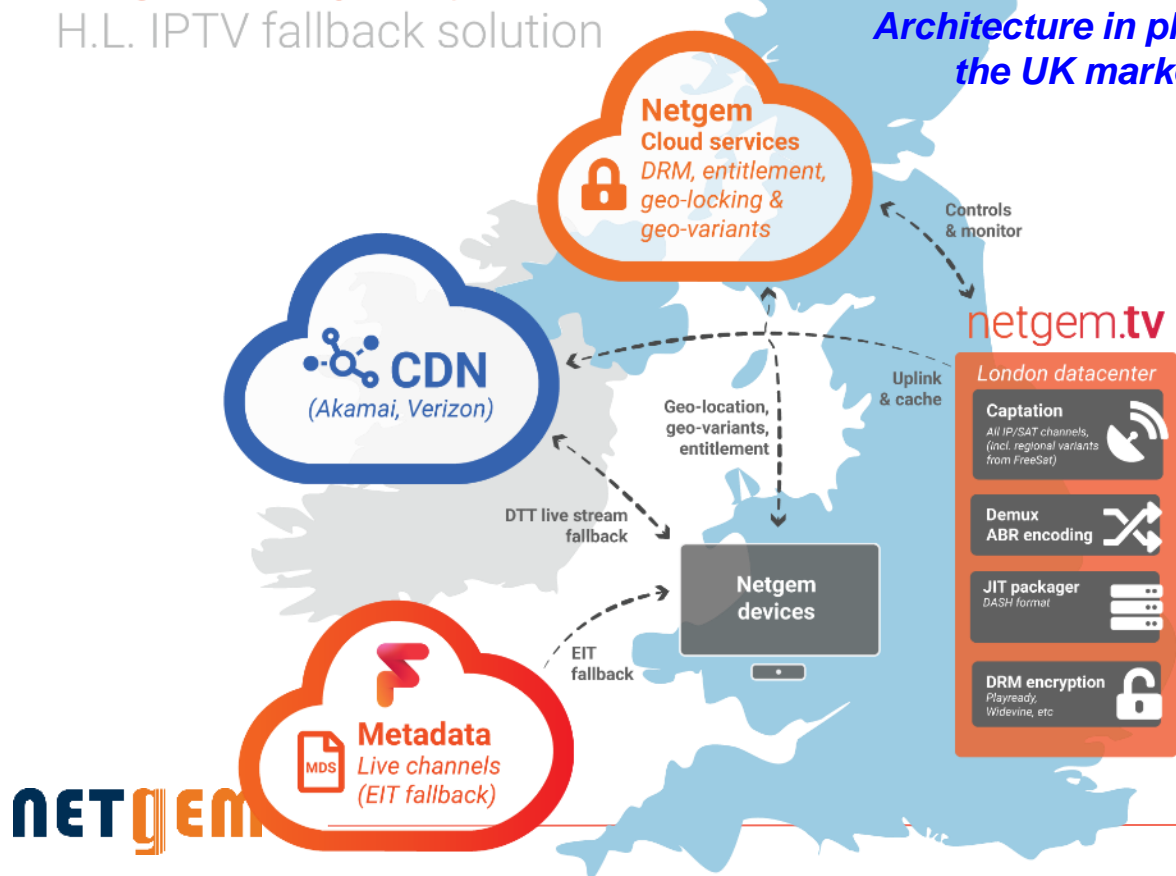
## Recommendations

## Customisation / Editorialisation




# Netgem TV platform combines HbbTV middleware/UI with a comprehensive suite of Cloud-based services for the UK market

Netgem UK hybrid platform  
H.L. IPTV fallback solution



★ **Netgem UK teleport**  
Downlink (SAT+DTT), demux, ABR encoding, Packaging and DRM encryption (including local channel variants and regional channels)

★ **EPG Metadata**  
Client accessing MDS data across all Freeview channels (EIT fallback)

★ **Netgem devices**   
Enabled with DTT/IP fallback capability (e.g. STBs)

★ **Netgem cloud services**  
Secure Cloud platform authentication, Entitlement (only selected devices), multi-DRM & geo-variants (in MS Azure)

★ **CDN**  
Cache management, live streams distribution



# Our market: all Fibre Altnets + TalkTalk = 25% UK households!

TalkTalk TV 4K announced to launch for Xmas'21 with NetgemTV

15 Fibre ISPs with Netgem TV (...and more to come on board!)

Broadband Households in the UK:



CAGR



Source: **POINT.topic** July 2021

**AltNet Full Fibre ISPs Target 29.9 Million UK Premises by 2025**

Tuesday, June 8th, 2021 (10:41 am) - Score 2,424

Email | Link News

7M = 25% UK households

# 15 Alternative Fibre ISPs have already launched with Netgem TV in UK & Ireland:

## Broadcast

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TECH

Oct'20


### Netgem and Origin Broadband partner to launch Origin TV

## Netgem powers Community Fibre TV

December 10, 2020

Community Fibre, the London-based full-fibre broadband provider, and Netgem have concluded an agreement to launch Community Fibre TV, leveraging Netgem's new branded solution for UK ISPs. The service will launch early next year, following on the success with Origin TV this year.

Community Fibre TV will look to hit the sweet spot of offering the best streaming experience across TV channels and combining popular TV channels and VoD content with services such as Amazon Prime Video and others.



Dec'20

## BROADBANDTV NEWS

INDEPENDENT SINCE 2005

metrological D2C is n

How Pay TV is changing the game

HOME NEWSLINE RESOURCES EVENTS ABOUT ADVERTISE SUBSCRIBE

### Netgem launches low cost multiscreen service


purebroadband

## Sep'20

### Enjoy a night in!

Voneus Broadband with netgem.tv from just £33.99 per month with 12 months Amazon Prime included.

\*TV & 1st supply. Some bundles restricted availability. Not available in some areas. See website for details.



## ISPPreview

Home Articles ISP List Reviews Top 10 Forum Speedtest Broadband

Home » ISP News »

### Broadband ISP TalkTalk UK Sign Netgem Deal to Launch 4K TV Service

Tuesday, October 12th, 2021 (6:48 am) Score 5.000

Email | Link News

15 Comments



### YOU CAN'T TRUMP THIS

NEW 4K TV BOX with 1 year

135+ channels

ONLY £15.99 per month

OriginTV

### MAKE TV GREAT AGAIN

NEW 4K TV BOX with 1 year

135+ channels

ONLY £15.99 per month

JT

## Nov'20

### Internet TV

Wightfibre

Because we care

Taking you to the action this December.

Watch Premier League football live on Prime Video this December with WightFibre and netgem.tv

From £17.49 a month\*

POP telecom

Gigaclear

Ultrafast Fibre Broadband



## TalkTalk

For Everyone

Oct'21



Netgem TV

Your TV. Your Choice.

BT and the BBC etc.). Such a move wasn't entirely unexpected, as the ISP has recently been rolling back their interest in existing Pay TV products (here).

Netgem TV's box and service have already been widely adopted by a growing number of UK ISPs, particularly smaller alternative networks that lack the funding to develop their own bespoke platforms. The set-top-boxes that they provide – Netbox HD and Netbox 4K – tend to be similar to some of those supplied by rival video streaming companies, including the usual array of premium content (sports), apps (Amazon, BT Sport, hayu, Rakuten TV, YouTube etc.), live TV channels (Freeview) and catch-up content.

NETGEM



# What Netgem TV is about: Pay-TV lite = *Your TV, Your choice*

**Best Entertainment**, on your terms



**200+ channels** including  
**80+ HD channels** not on Freeview  
(Premier Sports, FuelTV, GustoTV...  
and many more)



**50,000 free hours** of the  
biggest TV **Catch-up** shows



**...and 100,000+ hours** of pay-as-you-go content  
with **Personalised Recommendations**  
(Prime Video, Rakuten TV, BT Sport, Youtube...)



A complete turn-key service **designed for Telcos & ISPs**



**Device included** with purchase or  
**rent model available**



Light branding, smart interactions  
giving ISPs a **window to households**



**Local marketing support**  
& **UK-based CS (24x7)**



After **3 first successful years**, **Netgem TV** will continue to innovate in the UK with Freeview Play, towards more 'IP based' content & features:

### Fibre Altnets

Continue to drive Netgem TV expansion across growing number of 'Full Fibre' UK households

**TalkTalk**

Launch and drive growth of next-generation of 'TalkTalk 4K TV' powered by Netgem TV service across the UK (96% population coverage)

**NETgem**



**Adding OTT Linear, Timeshift, nPVR  
...across all screens!**



Leverage **technology developed for the french market** (TF1, France.tv, M6...) for 'Viva by Videofutur' as a full TV 'Multi-screen' service



Launch first version of '**Freeview over IP**' with BBC, ITV, Channel 4, and Channel 5 main channels in 2022





# Thank you!



*"Best user experience for  
Video Streaming service"*

**VideoTech**  
INNOVATION  
AWARDS 2019

*"Most advanced TV  
service"*



*"Best interactive TV  
application"*

