



Hybrid TV in Europe & beyond Symposium

December 17th & 18th 2012

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Hybrid TV in Europe and beyond

Country review

Chairman: **Régis Saint Girons** - httpv

Germany: **Klaus Illgner** - HbbTV consortium

France: **Frederic Tapissier** - HD Forum France

UK: **Andy Hickman** - Digital TV Labs

Italy: **Alberto Sigismondi** - MediaSet Group

Spain: **José-Luis Vasquez** - AETETI

Denmark: **Gert Svendsen** - Canal Digital

Middle East: **Hassan Chahine** - Glocom

Germany



Population : 38 M HHs

TV reception ¹:

- DTT 12,5%
- Sat 45,6%
- Cable 47,9%
- IPTV 4,3%

- Pay TV total 8,4%

1 – primary reception (source: Digitalisierungsbericht 2012)

- Technical profile
 - HbbTV 1.1
- Target network(s)
 - All broadcast networks (Terrestrial, Satellite, cable)
 - IPTV under investigation
- Penetration and forecasts
 - Today: ~4Mio devices sold, connection rate ~70%, most SmartTVs have HbbTV
 - 2015: all SmartTVs with HbbTV, SmartTVs >80% of TVs sold per year, ~10M TV set / year
- Market moderating organization
 - Deutsche TV-Plattform

Hybrid TV operations



Main Media groups with HbbTV services

- **ARD** (all channels) for TV & Radio:
 - portal, Teletext, EPG, catchup, news, event-specific live & catchup + background info, ...
- **RTL** (all channels):
 - teletext, EPG, weather, clipfish music
- **Pro7Sat1** (all channels):
 - teletext, catchup, EPG, twitter, advertisement, games, voting, weather, ...
- **Arte** (catchup):
 - catchup
- **HSE24 / QVC**:
 - (product info & sales, catchup)
- **Others**:
 - Large range of « long tail » programs with various applications

Zoom on a specific topic



- Market developed very early
 - First services by all main broadcasters in 2012
 - Fast growing penetration and usage
 - Pure retail market
- Issues being addressed
 - Adoption of HbbTV 1.5 namely for commercial services
 - Discussion about DRM
 - Preparation of a marketing campaign

France



- Population : 26M HHs
- TV reception ¹:
 - DTT : 59%
 - FTA Sat : 11%
 - Pay Sat : 13%
 - Cable : 9%
 - IPTV : 35%

1 - Household may have several TV sets so total maybe much higher than the number of HH

- Main Media groups having hybrid TV services:
 - TF1 (advertising, paid voting, event based apps)
 - France Televisions (portal, SALTO start-over, sport event-based catch-up/realtime results,...)
 - M6 (portal, advertising)
 - Canal+ (portal, tweet feeds on FTA channels)
 - Arte (catch-up, original videos))
 - NRJ (catch-up, live radio)



Hybrid TV operations

- **Technical profile**
 - Since 2011: HbbTV 1.1
 - To come : HbbTV 1.5 + DRM (Marlin & MS playready)
- **Target network(s)**
 - DTT and free satellite
 - Under Investigation: IPTV
- **Penetration and forecasts**
 - Today: 1,5M HbbTV compatible TV sold (~400K active HbbTV devices)
 - 2015 : 10M ? (2M? active HbbTV devices)
- **Project leading organizations : HD Forum**

Zoom on new HbbTV Profile



- **Specs made public in July 2012**
 - Project name : TNT2.0
 - Includes reference to HbbTV 1.5 + DRM to be selected within Marlin or MS Playready
 - Test suite proposed in cooperation with HD Forum
- **Devices**
 - TV sets (from 2013 models)
 - Satellite receiver & TV (Fransat connected profile)
- **First services likely to use the profile**
 - VOD (MYTF1VOD)
 - Catch-up TV
 - Startover
 - Streamed live channel

UK



- Population: 26.2M HHs
- TV reception :
 - FTA DTT : 38%
 - FTA Sat : 7%
 - Pay Sat : 38%
 - Cable : 15%
 - IPTV : 2%

Source: Ofcom, *International Communications Market Report 2012*

- Main Media groups having hybrid TV services:
 - BBC (iPlayer, sports streaming, news, red button – weather, etc.)
 - ITV/Channel 4/Channel 5 (catchup, VOD)
 - Sky (catchup and VOD)
 - Virgin (catchup and VOD)

Hybrid TV operations



	YouView	Freeview HD	Other DTT	Freesat "Free time"	Sky	Virgin
Technology	Flash and HTTP streaming	MHEG ICS	DTG D-Book 7 B (HbbTV), Intellect (HbbTV)	Proprietary (but uses HTML5 and HbbTV)	Proprietary	Proprietary (Tivo)
Platform	DTT Retail	DTT Retail	DTT, Not deployed	Satellite FTA – retail	Satellite Subscription	Cable Subscription
Deployment	Unknown, launch Q3 2012	4.4M IDTVs and STBs in Dec 2011	None	Unknown, launch Q3 2012	5M Sky+ HD boxes in Mar 2012	1M Tivo boxes in July 2012
Applications	Catchup, VOD, Backwards EPG	Red button, "Connect TV"	None	Catchup, Backwards EPG	Catchup, VOD, Backwards EPG	Catchup, VOD, Backwards EPG



HbbTV in the UK

- Why can't DTT just use HbbTV in the UK?
 - Interaction with MHEG apps and MHEG signalling
 - Sophisticated approach in D-Book 7 part B
 - Simple approach in the Intellect specification
 - Additional requirements from the public service broadcasters. E.g.
 - “Better” graphics
 - Advertisement insertion
 - Considerable interest in contributing to HbbTV v2

Italy



- Population : 25M HHs
- TV reception ¹:
 - FTA DTT: 73%
 - Pay DTT: 12%
 - FTA Sat: 26%
 - Pay Sat: 20%
 - IPTV: 2%

1 - a House Hold may have several TV sets so total maybe much higher than the number of HH

- Main Media groups having hybrid TV services:
 - Rai (catch-up TV: Rai Replay and VoD: TG Regionale. MHP app: Telecomando)
 - Mediaset Premium (VoD: Premium Play and MHP apps: Guida TV, premium calcio, ...)
 - LA7 (catch-up TV: La7 On Demand)
 - Sky Italia (VoD: sky on demand)
 - tivùon! (catch-up and FTA VoD services at trial stage)

Hybrid TV operations



- Technical profile (public horizontal specs)
 - DGTVI: GEM (MHP 1.1.3), DASH, CENC
 - tivùon! profile: Marlin DRM, Marlin Broadband Application Security
- Target network(s)
 - DTT operators and TivùSat
- Penetration and forecasts
 - Today: \approx 5%
 - 2015 : \approx 9M
- Project leading organization: Tivù, HDForum Italia, DGTVi



Zoom on

- DVB work for mid-term GEM evolution:
 - Define new GEM functionalities (APIs) to support a standardized interface for broadcaster and 3rd parties to integrate companion devices into the TV viewing experience
 - Define a browser-integrating architecture to combine GEM with other runtime environments (e.g. HTML5)

Spain



- Population : 17M HHs
- TV reception ¹:
 - Free DTT: 98%
 - Pay Sat : 10%
 - Cable : 8%
 - IPTV : 5%
 - Pay DTT: 2%

1 – CMT report – Q2 2012

- Main Media groups having connected TV services:
 - RTVE (catch-up, information, event based apps)
 - Antena 3 / laSexta (catch-up, advertising, information, news)
 - Telecinco (catch-up, advertising, news)
 - Digital+ / Yomvi (OTT VOD, live pay TV – premium content)
 - Wuaki / Filmin / Youzee (OTT VOD)



Hybrid TV operations

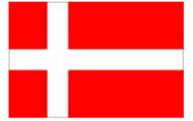
- Technical profile
 - HbbTV 1.1
 - To come : HbbTV 1.5 + DRM (Marlin & MS Playready)
- Target network(s)
 - DTT, IPTV (Telefónica)
- Penetration and forecasts
 - Today: over 2M TVs connected to the Internet, estimated over 1M internet-enabled TVs, no disclosed information on HbbTV compatibility
- Project leading organizations : AEDETI

Zoom on new HbbTV progress



- Standard agreed on November 2011
 - Linked to HbbTV consortium and French TNT and HD Forum – projected sync with HbbTV 1.5 + DRM
 - Interoperability agreements published in September 2012
 - DRM proposed by broadcasters: Marlin + Playready
 - Pending: certification entities and logo selection
- First services in operation
 - Catch-up TV
 - Streamed live channels / events
 - Advertising (limited)

Denmark



- House Holds: 2.2 mio
- TV reception ¹:
 - DTT ca. 300.000
 - FTA Sat ?
 - Pay Sat ca. 200.000
 - Cable ca. 1,6 mio
 - IPTV ?

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- Main Media groups having hybrid TV services
 - TDC/YouSee
 - MTG/Viasat/Viaplay
 - Canal Digital
 - SE/Stofa
 - Waoow

Denmark - HbbTV



- DR have extended the test period for 6 months
 - Very positive feedback from users on HbbTV service
 - Same content as www.dr.dk/nu
- Nordig have implemented HbbTV 1.5 as API
 - Discussions about.
 - EXIT button
 - HbbTV might be default set to ON in the TV menu

Middle East

- Population : 85 M HHs
- TV reception ¹:
 - DTT : 1 %
 - FTA Sat 67%
 - Pay Sat 13%
 - Cable 3%
 - IPTV 4 %
 - Analog terrestrial 20 %
(will be exchange by DTT very soon)

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- hybrid TV services is linked in the region mainly with IPTV (catch-up TV , live feed and events based apps)
- hybrid services is mainly provided by pay TV or telecom providers platforms like OSN , Etisalat , Du and integral
- broadcasters rely on web and mobile applications for VOD and interactive services
- broadband penetration is growing by more than 30 %/Y

Hybrid TV operations

Middle East

- technical profile :
 - no standard and serious tests
- Future Target Networks
 - free satellite
 - IPTV and Pay TV platforms ?
- Penetration and Forecasts :
 - 2014
- Project leading organization :
 - ASBU HDTV group : driving the adoption of broadcast standards across the middle east region and drive new broadcast technology initiatives .

HBBTV future penetration Middle East

- Main FTA revenue stream is from advertisements , big screen is the preferred means
- Most TV network has online full VOD service , interactive aps and ads platforms
- broadband penetration is growing rapidly (more than 80 % fiber to home connection in UAE)
- social media is growing exponentially , people eager for interactivity (after historical control)
- Certain culture and principle concerns may control the level of interactivity specially when it is under the broadcaster control
- big screen and broadband aps marriage is the normal transition:
 - maintain and increase revenue stream with high attention to dedicated adds
 - export the existing online services to the TV second layer
 - create interactive communities around news , sports and entertainment programs that can generate more accurate data about viewership behavior
 - Broadband content enhances broadcast content without competing with it.



Malaysia

- Population : 6,5M HHs
 - SAT: 50% (Astro)
 - IPTV : 6% (TP, eTV)
 - Terrestrial Analog: 46%
- Specs DTT network and STB specification released in 2012.
- Launch planned for 2014
- Includes reference to HbbTV 1.5, Not mandatory so far.
- Penetration and forecasts
 - 1 million STB subsidized deployed in 2014
- Project leading organizations :
 - MTSFB - Malaysia Technical Standards Forum Berhad.
 - MCMC regulator



Thailand

- Population : 20,8M HHs
 - SAT: 26% (pay-TV and FTA)
 - IPTV : 0,6%
 - Cable: 22,5%
 - Terrestrial: 51,7% (analogue)
- HbbTV is under evaluation. MEGH5 also evaluated
- Trial for DVB-T2 (January 2013) and probably for HbbTV services later in 2013,
- Launch planned for 2015
- Penetration and forecasts
 - 4 million STB subsidized deployed in 2014/2015
- Project leading organizations :
 - NBTC- National Broadcasting and telecommunication Commission



Singapore

- Population : 1,17M HHs
 - IPTV : 30,6%
 - Cable: 47,5%
 - Terrestrial: 39,3% (analogue and DTT)

1 - Household may have several TV sets so total maybe much higher than the number of HH

- Main Media groups considering having hybrid TV services:
 - Media corp - (Public broadcaster)



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Manufacturers and technology

Moderator **Benjamin Schwarz**, Ctoic

Mr. **Jonathan Piesing**, TP Vision

Mr. **Régis Saint Girons**, httv

Mr. **Stuart Savage**, LG Electronics Inc

Gold sponsor



Silver sponsor



- **Interactive TV experts**
 - Over 100 iTV applications deployed since 1998
 - Nagraguide EPG deployed over 6M STB

- **End to End Digital TV Product Line**
 - Head End Servers
 - htvStream (HbbTV, EIT...)
 - HbbTV Starter Kit
 - STB Software products
 - htvLink for Connected HbbTV STBs
 - htvLite for DVB Zapper & PVR



Global Presence



CAS

CHIPSET VENDORS

TECHNOLOGY PARTNERS

Televes

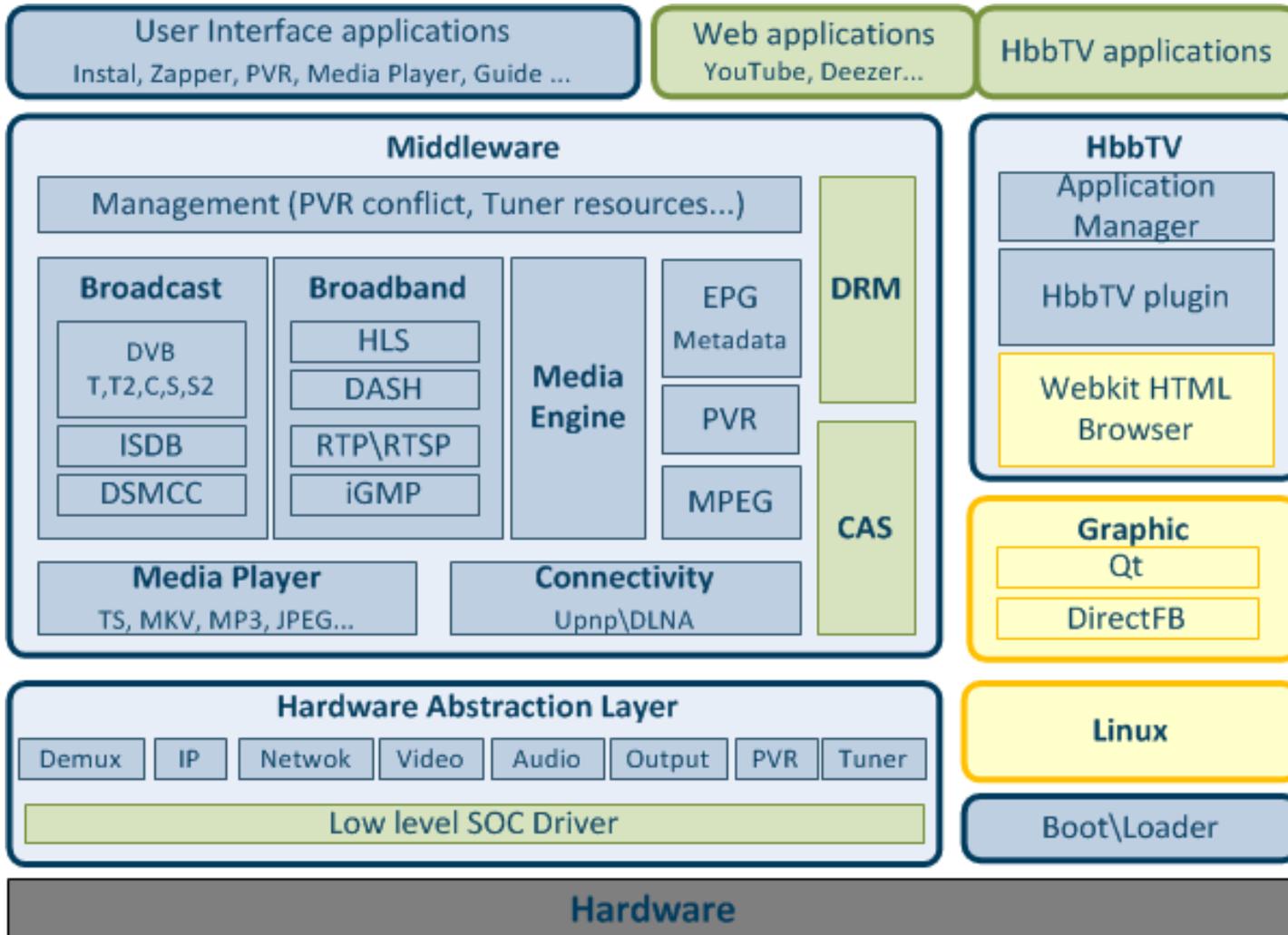
STB MANUFACTURERS AND DISTRIBUTORS

ASSOCIATION MEMBERSHIP

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● httv Offices

httpvLink Architecture



httpv
Open Source
3rd parties

Dedicated to HbbTV



2012 International iTV Awards « Grand Prix »



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Pay services, what and when?

Moderator: **Gilles Maugars** - CTO of TF1

Mr. **Tristan du Laz**, MYTF1VOD

Mr. **Alexander Sacher**, SES ASTRA HD+

Mr. **Heinrich Haase**, Kabelkiosk

Mr. **Colas Overkott**, Visiware

HD+ SmartTV



by ASTRA

HD+

Basic Linear Product



by ASTRA



Weitere Sender folgen.

Start November 2009 with 3 channels
in Germany via Satellite

Currently 14 HDTV channels
from private broadcasters

- Smartcard bundled with HD+ STBs / Modules
- HD+ STBs / Modules available in retail markets
- Anonymous access to content
- Free-of-charge for 1 year
- Prolongation available for 50 € p.a.

HD+

Results Q3/2012

Paying households



HD+ users in free trial period



Active HD+ households



* for 30 Sept. in both years



HD+ SmartTV

Market analysis HD+ Replay

Impossibilité d'afficher l'image. Votre ordinateur n'a pu télécharger l'image pour cause d'erreur ou l'image est endommagée. Réessayez de télécharger l'image plus tard ou contactez votre fournisseur de services. Si l'erreur est toujours présente, vous devrez peut-être supprimer l'image avant de la réessayer.

- ▶ Visits of broadcaster's media centers, e.g. RTL: April 2012
10,6 million Users

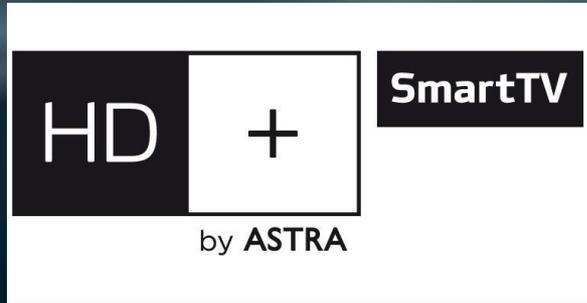


- ▶ Why end-users buy interactive devices...

- ▶ Catch-Up TV
- ▶ Information services

Source: AGOF, Working Group for Online Media Research

HD+ SmartTV and HD+ Replay



Full Portal offering



Fee required

Part of HD+ SmartTV is HD+ Replay



HD+ Replay offers A/V Streaming Content from private broadcasters (Catch-Up TV, Archive Content and Previews)

Pricing Model HD+ Replay

Illustration = DRAFT



HD+
Replay
3 month for 15 €

Reload till
12/31/2013
and use the service
another 6 months.

- Start December 2012 in partnership with



- further STB manufacturers in 2013:



- **Pricing-model:**

- Reload-Voucher similar to linear HD+ product
- 3 months free-of-charge period
- Anonymous access
- 3 month Reload-Voucher for 15 €
- 2013 seen as promotion period

1 year Usage of HD+ Replay (including 15 € HD+ Replay-Voucher)

3 months free-of-charge

3 months Reload-Voucher

+ additional 6 months of usage
(in promotion period 2013)

A/V Delivery Systems for HD+Replay

HD+ intends to set up an additional alternative Content Delivery System for HD+ Replay

Initial Phase

HLS

NAGRA Media
PRM

2nd Phase

MPEG-DASH

DRM with
MPEG-CENC

Thank you!