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[IPTV Forum day3: Device diversity and client technology](#)

Steve Reeder, executive director, ANT said IPTV was a misnomer.

"The digital assets of the family are a fricking mess. iPods, PCs, phones, all spread around different locations in the home.

Most of the mess is user created," he said.

The 1990s, dotcom era answer to all this was getting all your

content though one consistent bundle. But maybe the end users like the mess? One bundle doesn't reflect the diversity of people's lives, says Reeder.

"We, as an industry are still trying to deliver *the* bundle, rather than addressing the issue of diversity."

He said IPTV players must respect the diversity of devices and deliver things immediately.



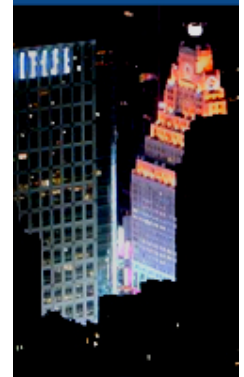
France Telecom's MaligneTV, 200k subscribers

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Plus, IPTV 'extras' may not be that great afterall. "Are we so sure that people are that thrilled by the facility of pausing the football game because their mother in law is calling? We get carried away by what technology can do for us. But there's no silver bullet for IPTV." He says next-generation client technology for the set top box has to come of age.

09 Mar | By Mike Butcher | [Comments \(0\)](#) |  

[IPTV Forum day3: Interactive shopping on IPTV](#)



Martijn Lopes Cardozo, Executive VP of IPTV Goldpocket Interactive, a TANDBERG Television company had a funny story.

They found that their interactive shopping service was very handy for the elderly. In fact, they found a 90 year old woman who'd wake up in the night but couldn't find the phone to shop on the home shopping channel. But she could find the TV remote... Hmmmnnnnn...

09 Mar | By Mike Butcher | [Comments \(0\)](#) |  

[IPTV Forum day3: The Microsoft guy underwhelms...](#)

Andrew Mcloughlin at Microsoft TV gave a rather general, touchy-feely presentation about the 'digital lifestyle', which, after three days of conference really didn't cut it with the audience. Truisms abounded. What he did say was that Microsoft's thoughts about TV are that it is an 'unconnected island' in the home which is about to get really connected, but "software will glue it together". Guess who's software? Interesting stats: there are 1.6 billion TVs worldwide (In-Stat Sept 2004). There'll be 738m pay TV and 224m digital, in 2008. 20m IPTV subscribers by 2008, 97% annual growth.


09 Mar | By Mike Butcher | [Comments \(0\)](#) |  

[IPTV Forum day3: VOD boosts satisfaction](#)

Andy Birchall, executive chairman of On Demand Group talked about the value of VOD, subs-VOD, "replay-TV" and packaging on-demand services to generate revenue.

He said users rate 'on demand' TV highly. The average satisfaction with NTL has risen every quarter since they launched VOD. Satisfaction with channel choice is higher among VOD users than non users.

He says product design, good programming management, making sure the billing works, not 'over selling' to consumers, but over delivering is all key to success.

09 Mar | By Mike Butcher | [Comments \(0\)](#) |  

[IPTV Forum day3: *Exclusive* - Wanadoo's Freeview offering](#)

Eric Abensur, CEO, Wanadoo UK, said in the UK, it has contact with 20m individuals whether through online or mobile with it's a partner Orange (France Telecom owns both).

He thinks factors which drive IPTV include more programmes, higher quality, instant access via PVRs or catch-up TV and **community interaction**. This last aspect was the first time during the conference anyone directly mentioned community and sharing content.

Abensur says IPTV players only reduce churn in customers if the customer experience is "seamless".

Wanadoo wants to control the IP network and the gateway at the heart of the home.




"Then you can deliver services at incremental cost. You can connect the gateway box to WiFi cameras, or music players or a set-top box for the TV."

It used to be a simple Wi-Fi router, now it's more complex via firmware. Gradually they have offered VOIP, and soon they will send a new set-top box which delivers IPTV.

Cheaper, better and simpler is their mantra.

Is this an exclusive? Wanadoo is going to be offering a "Freeview type offering". The launch is "soon".

09 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day3: i-Advertising opportunities abound on IPTV](#)

Merlin Inkley, Head of Airtime Management, Channel 4, said the "Vast majority of advertising agencies are shoe-horning interactivity as an afterthought onto programmes. They should think about interactive from the beginning. **We're working on one single tool that will create an interactive advert for all platforms.** That's being launched very soon."

"Everyone talks about PVRs, but our tests are showing that even in a PVR world, there are advertising opportunities, we just have to productise those in a way that makes sense."

Apparently more people voted in X-Factor than the last general election!

In terms of the cost of production for interactive advertising, the costs will come down for agencies. The cost of bandwidth halved last year and lead fees went from 50p to 10p. Costs should drop up to 40% over time.

Over three quarters of iTV advertisers have gone on to create another campaign, so it has a head of steam. "But we've got to look at introducing DTT platform ahead of time, and position it all so that advertisers have something easy to buy. If you're introducing 6m more DTT homes, then costs will fall and the market will grow for advertising."

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[IPTV Forum day3: Final quotes form IPTV forum](#)

"Customers like to apply their creative approach, so offering a large library of content is crucial."

"Networks need to be built anticipating 100 times more traffic, given that we are not factoring in things like blogging and user generated content."

"Video on demand will be the way we watch TV in the future."

"Why store all this stuff in my home on a home server if it's all going to be done by the operator? It's easier for studios to hold operators accountable for DRM and storage than consumers."

"Customised EPGs are the way ahead."

09 Mar | By Mike Butcher | [Comments \(0\)](#) | 

IPTV Forum day3: New entrants to TV market on the horizon

Glenn Hall, "Media Anthropologist" with Hewlett Packard continued: "The Hybrid DTT/IPTV approach looks good right now, but integration can be difficult."

Hall predicted that **over the next**

6 years there will be new entrants into the TV market;

there'll be European and global M&A in IPTV; and someone will take advantage of ASO - Analogue Switch Off.

He also said **IPTV services will power education and learning; mobile TV, video iPods, Origami, all will be ubiquitous;** and IPTV will be well established with full HD services.

In other words, "Get on with it."

08 Mar | By Mike Butcher | [Comments \(0\)](#) | 



Conference buzz at IPTV Forum

IPTV Forum day3: Telcos on top, film studios gotta get with it

Peter Kerckhoff, senior vice president of content and portal for T-Online, said telcos are best positioned for IPTV. Ok, he would say that, being a telco.

But his reasoning is this: they can do on demand video, no lit to channels, real interactivity, existing customer base, micro-payments possible.

He continues: A lot of differing media players are getting involved in the VOD space: Google (free and paid videos on the web), AOL (6 free TV channels on the web in 2006), NBC/CBS, Amazon (offering VOD in 2006). However, he thinks **film/TV studios will probably be better off working with key local IPTV partners than trying to go it alone.**

His conclusion? Film studios need to recognise IPTV; there is a misconception about security - IPTV is more secure than the Net; mobile TV will have a big impact on user consumption.

Just so you know, T-Online does games on demand, VOD on TV, music, VOD on PC, Erotica, VoIP, you name it.

08 Mar | By Mike Butcher | [Comments \(0\)](#) | 

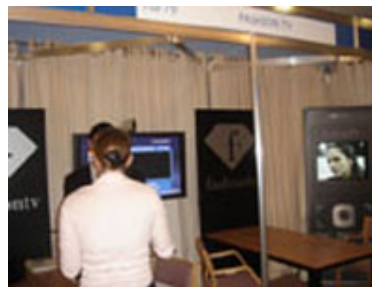
IPTV Forum day3: Content will be stolen... it's inevitable

Dom Stasi, CTO, TVN Entertainment spoke about digital watermarking. What's that? Well it's CSI stuff: "Digital forensics" in fact.

It's all about the ability to deny content to illegal interceptors, and getting the "forensic traceability" for where it appeared online. **TVN is the primary**

video on demand network in the US. It distributes by satellite to 350m english-speaking people in North America.

Stasi thinks "We are about to become the Windows for distribution of pay TV, close to the early release for films."




FashionTV strikes a pose at IPTV Forum

"It's inevitable that content is going to be stolen, it's about eliminating the sources for illegal content."

What often happens is that projectionists shoot the new films on digital camera and then distribute them on P2P networks. The question is which projectionist, and which theatre?


Watermarking is putting a signal in a signal, not detectable by naked eye.

Fragile watermarking does not service copying. Robust watermarking does. **It takes a LOT to get rid of a robust digital watermark, and it will identify the actual set-top-box where the copying took place, so you can finger the crook.** A single frame will tell you the exact STB and its location.

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[IPTV Forum day3: Shrink the piracy window with IPTV](#)

See a boom mic in the movie? It was probably pirated during post production, prior to theatrical release. **70% of initial illegal content is posted first by industry insiders (editors etc)** But was it the editor or the cleaner who copied the film onto their iPod? Crucially, more title get pirated *just prior* to DVD release. Indicating that if you shrink the window between theatrical and DVD release you shrink the piracy window. That's where IPTV players have an opportunity to work with the film and TV studios.

08 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day3: Broadcasters and IPTV's consumer connection](#)


Glenn Hall, "Media Anthropologist" with Hewlett Packard argued that a flexible approach is needed to IPTV.

He said video is "always in the wrong format, and the wrong place" and the TV industry isn't the strongest economically.

But the return path is critical, and one where Microsoft is a "sleeping giant".

He advocated new technologies and ideas from other industries. So from the mobile space: IMS (IP Multimedia System) - is important to IPTV as it binds together technical realities into open, available standards; SOA - Service Oriented Architechures from the tech world; and looking at GUP - Global User Profile, as used by the advertising industry.

"The broadcast industry won't go away, so work with it - but the key advantage with IPTV is its deep consumer connections. It is a great new advertising proposition - so get creative and come up with new advertising ideas."

08 Mar | By Mike Butcher | [Comments \(0\)](#) | 

IPTV Forum day2: IPTV business models set to disrupt

Bill Scott, leader of Digital Media for IBM, talked about **business models** in general at the 2006 London IPTV conference. He reckons the current pay TV market is like a high street full of shops. You pick from a range the shop keeper has selected. This model works and will "for a while



Texas Instruments at IPTV Forum


longer". **The Internet TV model is more about picking and choosing content providers from a broad marketplace.** IBM published a white paper outlining this in detail called "The end of Television as we know it."

Next gen content consumption involves local playback, secure copying, media servers, portable devices. In particular, content owners like broadcast encryption, as it's "hard to hack". He also mentioned "Porto Media", which involves digital video rental - you plug in an SD card into a kiosk and download a movie in 18 seconds.

Scott says the barrier to content availability is coming down. Industry standards are being developed. Bandwidth and compression technologies are improving.

IBM concludes that **there is going to be a big disruption to the TV business generally because of things like IPTV but that it won't be as bad as what happened to the music industry.**

So that's all right then...

07 Mar | By Mike Butcher | [Comments \(0\)](#) | 

IPTV Forum day2: Content and network intelligence


Theo Landton, of Cisco, said: Content will enter the home and leave the home over multiple devices and multiple networks. Networks have to scale to millions of users and need to have entertainment grade quality "glass to glass" systems.

Personalising, adding even things like location awareness will need to be added to IPTV services.

How do you track users? There is multi-identity for end users - IP address or Mac address? Who are they where are they? A user can be identified in a certain way, independent form the access network and device.

"IPTV is incredibly sensitive to packet loss. Scaling this to millions of users is going to be hard. It's all about packets!"

This is not TV as we knew it. Network intelligence is very important.


07 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day2: Content delivery, a myriad of options](#)

Ran Avital, associate vice president of broadband access division for ECI Telecom said technologies of the web and IPTV need to come together.

The existing last mile technology demands a large investment. WiMax is a candidate for the future. Mesh networks could be the answer. Hybrid approaches such as DVB-Satellite + IPTV, with wired WiMax, and sensible IP downloads could also be an answer.

In other words **there are a lot of ways to cut and dice IPTV services.**

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[IPTV Forum day2: Successful models and open value chains](#)

Enabling targeted advertising in IPTV creates big revenues

says Rob Glidden industry manager Broadband Media, Sun Microsystems.

He thinks keeping an open value chain, multiple vendors, and a scalable ecosystem beats constrained choice, vendor lock-in, limited innovation.

But he would - he's from Sun for Pete's sake.

07 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day2: Tiscali talks IPTV models, content and Google](#)


Richard Ayers, Portal Director, Tiscali said no-one really knows what the IPTV audience and business will be like.

"One difference in the UK market will be telcos shifting to being distributors of media. Sky, the most powerful TV player, is coming from the other direction

having bought Easynet. **Not even Sky knows what will happen next.**"

"We have a close relationship with the guys at Dell, who will be wrapping media centre functionality as standard in some of their PCs. Where ISPs fit in is the one-bill relationship with customers. That means we have a more cohesive package and at first it's a tough marketing message, but in time people will adjust. Sky's message was difficult to start with now it's straightforward."

Ayres went on to say that the Google Video launch was "iffy". The Tiscali TV service was launched 18 months ago - it's a smaller firm, and has to move quicker: "It did OK numbers, but at least we had something out there. If Google and Yahoo talk to the Sonys and the Warners of this world, they are talking at a global rights level."

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Ruwido on show

IPTV Forum day2: Rapid-fire quotes from conference panelists

...from the 2006 London IPTV conference:

"It's TV not IPTV. People don't know what the hell IPTV is. They don't want subscriber based TV. They want flexible payment and cheap!"

"IPTV operators will differentiate themselves on content."

"There are lots of add-ons to telco services but little of it comes together."


"Managing 5 million modems is easier than 5 million set top boxes with home users who have 20 more content services on the box."

iPod experience: "It's the ability for subscriber to pick and choose content for playback with a simple user interface. If my mum can do it, then it's a recipe for success."

"After spending millions on research most IPTV providers have found that people just want something that's simple and easy."

"There's a big difference between watching a managed service and a plain Internet connection. People don't want to wait for downloads."

"Niche content (see your local dog show) is not the answer."

07 Mar | By Mike Butcher | [Comments \(0\)](#) | 

IPTV Forum day2: BT believes in IPTV on multiple devices


Andrew Burke, CEO, BT Entertainment Division spoke convincingly about BT's approach to IPTV.

He noted that **there is only 5 percent growth on voice calls, but online growth is huge. 60bn emails a day, 10bn SMS, 6bn instant messages sent a day. Ultimately, this may move to the TV.**

Business case for IPTV is: with broadband penetration IPTV is more possible. 35 percent of households in the UK now have broadband. So IPTV is a good candidate for growing ARPUs.

But it's about getting broadband to multiple devices. If you concentrated on PCs you'd get stuck at 67 percent penetration, so it's about hitting other devices too.

Analysts says it'll be a \$36bn entertainment market by 2007.

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IPTV Forum day2: Broadband TV, what about the consumer?

Is IPTV really going to happen? Consumers are giving us "hints": Convenience is key. They don't like being bound by the schedule. Sky + is showing that people watch less live TV and more PVR recorded content.

Single occupant households mean the TV could become a place for community interaction. This is important.

PRS activity - so the final of X-Factor/American Idol etc, lots of activity, with voting and gaming channels.

Freeview: growth shows people want more choice in channels.


Consumers want a simple interface. The experience has to WORK.

Installed, wired, content, customer support, billing end to end process is complex, and critical to success. "Keep it simple stupid."

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[IPTV Forum day2: Challenges to IPTV](#)

Challenges around content include the rights. Multiple rights holders. "Windows" sellers want to preserve broadcast windows, but consumers want it on demand. Cost and existing agreements. Technology issues: DRM, compression, quality assured, cost effective. Can it travel across devices? Needs to be DVD quality. ** BT's solution is a Freeview hybrid (takes ariel signal and mixes it with the EPG to get the best of both worlds). Uses MPEG, Microsoft DRM, open APIs. "With all those together we might find we have a business model. We've learnt NOT to do content. We partner on content."


07 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day1: IPTV vs. pay TV ?](#)

Can hybrid IPTV models succeed or will it just cannibalise the pay TV market? Some players might just bundle broadband for free as part of a package. (Note: That would technically screw any IPTV player). So Google, or Yahoo offering video straight to consumers using existing networks is, well, bad news.



Panelists talk shop at IPTV Forum

06 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day1: Insider take on emerging IPTV market](#)

Speaking at the IPTV Forum today in London, Tom McKeever, consulting director, with Ovum, defined IPTV as the delivery of both broadcast and on demand TV and video services over an IP network (to a TV not a PV).

He should know. He worked 12 years ago at Pacific Bell on similar ideas. "We've all seen the trials and the failures. It has proved a failure among consumers. So are we crazy?"

He reckons the emerging IPTV market is not the same as the last time around. The cost is different for starters. "Costs have dwindled. Storage has moved into the margins. Higher access bandwidth is cheaper now and meets consumers realistic demands for the true TV experience." The willingness to pay for TV now is important. What is driving IPTV? Fear of cable TV firms adding VoD, VoIP etc. And new broadband telecoms competitors are adding similar services. So IPTV offers, for incumbent telecoms players, new revenue streams. It's now about "can we afford not to get into this?" said McKeever.

06 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day1: Territory, regulatory, competitive scenarios](#)

Every country will be different, in regulation and penetration. By being too defensive, some won't have service innovation.

Trying to stem the flow of telephony revenues would hinder the success of IPTV.



Country markets vary widely in terms of what video people consume.

In the **Netherlands**, it's 90% cable penetration, whereas in the **UK** it's the opposite. The **US** battle is a three way play between a strong cable industry, two strong satellite players and the big Telcos. The Telcos are about to enter the market significantly.

In **Germany** people are used to not paying for TV. There is very low ARPU (average revenue per user). That affects the way IPTV rolls out there. The **US** could see 20% of market by 2009, but declining ARPUs.

Regulatory regimes treat open access networks differently - they may well act in favour of telco IPTV players, if lobbied in the right way.

But there are big competitors on the horizon: **"How soon is it till people just flip to "Google TV" because they can't find the right content they want, and just pay for the access?"**

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[IPTV Forum day1: Content is king, but services go](#)

IPTV players need to focus on revenue services, so they may need to become service providers not content providers. Telcos are indeed keeping out of content this time round. Trying to develop content is "disastorous".

It's really now about partnering, not making content. It's much

better to focus on existing strengths.

"Content is king, and wants to be on every platform, So if you concentrate on content, you forget the other things like billing and customers care. Ultimately content will be on many platforms and won't be the key differentiator." Video content revenues will gradually decline anyway, so you need to focus on additional services.

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France Telecom's IPTV brand

[IPTV Forum day1: Sky vs. IPTV open networks](#)

McKeever talked about open versus closed networks: "Why, when I have Google on TV would I bother with a closed garden of Sky etc? Pay TV players need to answer this question for the consumer. Is it an EPG, better customer service that makes the difference? It won't be the content."

The penetration of HDTV will be crucial here. When you get HD signals and they consume 15 MB/s each for three TV, 25MB/s is not enough.

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[IPTV Forum day1: IPTV and cross-platform possibilities](#)


Chris Coles, president and CEO of Myrio, a Siemens IPTV company, said "We'll see a blending of services across mobile, TV, OPC and fixed phone services." He was giving a keynote today at the IPTV Forum in London.

"The market is now measurable and growing. Consumer segments will support a variety of options in delivery. There's no real pure play in IPTV.

Speed is a real differentiator between competitors. Instant gratification is key to the ability of IPTV networks. And the 'best effort' video over the Net will create the most benefit."

He went on: "Video gets treated as a step child when in fact you should put effort into all the services.

IPTV is a 'a media model', not a utility model. It's not just about selling voice services?"

06 Mar | By Mike Butcher | [Comments \(0\)](#) | 

[IPTV Forum day1: European IPTV rollout](#)

Martin Olausson of Strategy Analytics said the market for internet services is clearly growing. He said: **"By 2010, 107 million European homes will use broadband, that's 63% of all homes, and 93% of PC-owning internet-enabled homes."**

France is the best example of local loop unbundling, where there is now a very competitive broadband market. "We see IPTV being deployed all over Europe in the next few years.

The UK will have the fastest rollout, but Europe will have the greatest number of rollouts."

"Most incumbent fixed operators have plans for IPTV services: France Telecom, DeutscheTelecom, Telecom Italia, Telefonica, British Telecom.

Deutsche Telecom has the most ambitious plans for 1m customers by 2007, 3m by 2010.

"By end of 2010, IPTV will have established itself as the fourth platform, but it will be the smallest of the four. Although many will be hybrid solutions."

So multicast versus IPTV plus linear, will be mixed.

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