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IPTV WorldForum: IPTV Is A Must, Says Wanadoo CEO

Premium Content Will Not Be Central

by Ouida Taaffe

Thu, March 9, 2006

“Broadband is expanding but the retail price is falling while speeds increase,” says Eric Abensur, the CEO of Wanadoo UK, the ISP division of France Telecom, speaking at the IPTV World Forum in London. “Providing TV is a must have for us. We have no other choice.”






The UK is, Abensur points out, one of the most competitive markets in terms of digital services - and that is before the switch from analogue to digital TV. In tackling this, Abensur aims to apply what he calls the ‘rule of three’. That is: cheaper, better and simpler. “We need to find a way to make services available at the most competitive price,” says Abensur, who stressed that customer retention was a key element of Wanadoo’s IPTV strategy.





Unsurprisingly, given this parsimonious approach, Abensur does not intend to compete on premium content. “Our core business is to help our customers communicate,” says Abensur. “We will offer basic TV and give the control back to our customers. If you want to deliver just premium content, satellite is probably a better and cheaper solution.”

France Telecom already has “over” 200,000 IPTV subscribers in France, where the service was launched last year, and the France Telecom Group – in the shape of Wanadoo and Orange – “has contact” with almost 20 million telecom service users in the UK. “This is a significant asset to build convergence,” says Abensur who did not provide details of either planned penetration or ARPU.

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In the UK, Wanadoo will have a freeview type of offering “as a basic [IPTV] proposition” and a key focus will be on making it user-friendly. “If you massively disrupt the customer experience, they will not forget that,” says Abensur. He points out that Wanadoo could, in theory have launched IPTV two years ago when it introduced its Livebox. However, it deliberately waited to allow consumers to get used to the disruption that each new service – first WiFi and then VoIP - brought.

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IPTV WorldForum: The All-Seeing Satellite Eye?

Watermarking Content Can Help Control Piracy

by Telecommunications® Staff

Wed, March 8, 2006

The Germans have a saying that would appear to be relevant to the mindset of the content industry. This is: 'Trust is good, control is better'. However, there is, it seems, also good reason for at least a little paranoia, certainly where visual content is concerned. According to Dom Stasi, the CTO at TVN Entertainment Corp, a distributor of content via satellite in the US, the satellite distribution of films - hugely efficient though it is - is uniquely vulnerable. The reason for this is that the human eye needs analogue. "There will," he says, "Always be an analogue hole" in satellite distribution.





As things stand, most piracy of visual content is an 'inside job' - down to, say, projectionists deciding to make their own copy for a little extra distribution. Leakage via the VOD network currently represents around 5 per cent of the total, according to Stasi. However, he expects that this could change radically as the time lag between film and DVD release and availability over other platforms disappears.

How to stop piracy on satellite networks?

Stasi suggests that the way to discourage pirates boarding your content ship is to watermark content. In this way, he suggests, it can be tracked. If, at the moment, content from a satellite feed were pirated via "Aunt Tilly's backyard in Kansas" no-one would know that Aunt Tilly was implicated. With watermarking, things would be quite different.

TVN, Stasi says, handles around 11 million pieces of content a month - which is in

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stark contrast with the biggest TV networks. These are relative amateurs in terms of content management - typically dealing with a few thousand elements of content a month. (The disparity is partly down to the codecs and meta data that satellite has to deal with.)

“This requires automatic control and a depth of forensic traceability to make sure the content goes where it should go and is denied access when it expires,” says Stasi.

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IPTV WorldForum: Belgacom: Attack is Best Form of Defence

Leads Digital TV Charge Ahead of Cablecos

by Ken Wieland

Tues, March 7, 2006

“Incumbents, every now and again, need to go out and attack,” said Scott Alcott, COO of fixed line services at Belgacom, at the IPTV World Forum today. “That’s what we’ve done with the launch of our digital TV service [September 2005].”





In making its foray when it did into digital TV, Belgacom managed to pip its main cable rival Telenet to the post, which launched its digital TV service in autumn 2005. Currently, the Belgium incumbent has a 62 per cent coverage of households that it can offer ‘TV grade’ services to. It is aiming for 80 per cent coverage – through a mixture of ADSL2+ and VDSL access technologies – by the end of 2006.

“TV can also provide us with structural stability,” added Alcott, arguing that if the country’s cable operators made an aggressive play for its voice customers it would be able to respond in kind with attractive digital TV services.






Belgium has a 93 per cent cable TV penetration, but the digital TV and pay-TV markets are immature -- a five per cent and seven per cent penetration rate respectively. “There is not a lot of differentiation in the cable TV market and plenty of room for growth and innovation,” said Alcott.

Belgacom, by securing exclusive football rights in Belgium for domestic top-flight games and the serie A in Italy, is hoping that its digital TV offering will soon gain traction. However, it is not forcing customers to subscribe to a package of channels before they are entitled to purchase the football coverage should they want it (which is a common marketing ploy of cable operators). Other service package innovations

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that Alcott claims in Belgium is the simultaneous broadcast of multiple football matches. “No-one has ever done that before [in Belgium],” he said.

At the moment, Belgacom has 2.8 million residential customers, one million of which are on broadband. “There is potential for high growth,” said Alcott. “Half of our broadband subscribers say they are interested in digital TV.”

But it won’t be all plain sailing for Belgacom, not least in trying to keep customer installation costs down. “It is a nightmare,” said Alcott, who says that it has been necessary to send out technicians to do the initial IPTV installations, although it is planning a ‘modular approach’ to installation with the customer doing more of the work.

“Wiring is a particular problem [linking the cable from the telephone jack to the set-to box, which are often in separate rooms],” said Alcott. “We’re looking at powerline and WiFi but the technology is not fully ready yet.”

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IPTV WorldForum: KPN and Bell Canada Bullish on IPTV...

...But Tight-Lipped On Financial Data

by Ken Wieland

Mon, March 6, 2006

The KPN presentation at the IPTV World Forum today promised much. According to the programme notes, Hugo Suidman, senior marketing manager at the Dutch incumbent, was going to talk about 'IPTV capex and opex considerations; revenue opportunities; and return on investment expectations and projections'. Alas, this did not happen.



Martin Cullum, GW of technology development (video networks) at Bell Canada, was similarly tight-lipped about business model assumptions, although he did say that the Canadian operator's capex investment in its fibre-to-the node programme – of which it is half way through -- would cost US\$3.2 bn. Bell Canada is aiming to cover 80 per cent of households with 26Mbps bandwidth capability by the end of 2008.




But despite the lack of any hard financial figures, both operators – as you would expect – were upbeat about the impact IPTV could have on TV viewing habits. "Broadcasting will disappear within ten years in favour of single casting [where consumers can watch the content they want and at the time of their choosing]," said KPN's Suidman.

He was confident that the levels of programme interactivity and content customisation enabled by IPTV would allow the incumbent to challenge the cable operators. In the Netherlands, cable operators' pay-TV packages have a 90 per cent penetration rate. "We're not trying to copy our competitors," Suidman added. "Our strength is our broadband reach and billing systems that are capable of micro billing

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[as little as one Euro cent per month].”

KPN intends to launch an IPTV package in 2Q 2006 using ADSL2+ technology. It already has a digital TV offering in the market using DVB-T (digital video broadcasting – terrestrial), which was launched in 4Q 2004 in the western part of the Netherlands. Suidman reports that KPN has managed to gain a 4.5 per cent household penetration in that area (120,000 households) with this service, and all without making much marketing effort. This could augur well for KPN’s IPTV plans if customers in the Netherlands are not averse to choosing the telco as their TV service provider.

Suidman did concede, however, that there were still ‘governance issues’ that needed to be resolved before launching IPTV. “We have to make sure that our servers don’t get stuffed with pornography when we launch the service,” he said.

Bell Canada’s Cullum stressed the importance of video as part of a bundled service package. “Eighty per cent our customers that we surveyed said that a bundled offering was not viable for them without video,” he said. “TV is the killer application.”

Cullum is looking at a variety of ‘add-on’ services to make the IPTV package more attractive – caller ID on the TV for incoming phone calls, self-service portals (where customers can remotely programme their PVRs), and ‘advanced search’ facilities to find content within the ‘walled garden’ of the operator. He was understandably less keen for set-top boxes equipped with web browsers. “I don’t want my customers searching for content on the internet,” he said.

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IPTV WorldForum: Fastweb: TV Not the Carrot for Triple Play

Strong Voice and Internet Service is Key

by Ken Wieland

Tues, March 7, 2006

For operators looking for guidance on how to market their IPTV and triple-play services, they could do worse than turn to Fastweb for advice, the Italian alternative operator. Starting commercial service over its all-IP network in 2001, it now claims an 11 per cent share of Italy's broadband market, although this penetration is higher in the areas it targets (it has a selective coverage of 10 million households in Italy's urban areas out of a nationwide total of 21 million households).


But more importantly for its credentials as an operator to listen to, it has jaw-droppingly high ARPUs – nearly €900 per year.

But to gain market share and the high ARPU, Paolo Agostinelli, Fastweb's CMO, stresses the need to first offer a very competitive voice and internet access service with perceived value – it is only then can you hope to reel in the even higher ARPU triple-play subscribers who use TV.

“TV has not been a strong reason to buy Fastweb for those not interested in voice/ internet services,” he said at the IPTV World Forum today. “Before you can offer triple play, you have to be seen as the best [value for money] on each of the different services [video, voice, internet].”

As of September 2005. Fastweb's yearly ARPU was €887, with TV services accounting for €70. However, the TV ARPU figure is skewed downwards as not all Fastweb's customers (72 per cent) take the video service. But of the €70 figure, 65 per cent is accounted for by pay-TV with the remainder coming from video-on-



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demand.

“IPTV will never substitute traditional broadcasting,” added Agostinelli. “The two services are complementary.”

As far as content is concerned, Agostinelli warned against a focus on niche markets. “You need to have something with mass market appeal,” he said. He also advised that telcos needed to protect themselves from over-paying content providers. “There should be revenue sharing deals where remuneration [to the content providers] should be proportionate to the number of customers.”

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