“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
- 2002 The first Freeview IPTV set-top-box ‘iPlayer’ on BT
- 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

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

Source: OFCOM, Jul'19

BBC licence fee paid by 250,000 fewer people

...or...

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

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

Source: OFCOM, Jul'19

BBC licence fee paid by 250,000 fewer people

...or...
The ‘best of free TV’ and the ‘best of Pay TV’

Value, content choice, & quality of service
Leading UK innovation with **HbbTV & Freeview Play** at the heart:
From a Broadcast friendly box to a Broadcast friendly service...

**1st**
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)
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)

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**Content Innovation Awards 2017**
Netgem is a **WINNER**

**TV Connect 2018 Awards**
Netgem is a **WINNER**

**Video Tech Innovation Awards 2019**
Netgem is a **AWARD WINNER**

**CST Awards 2020**
Netgem is a **WINNER**
# Only £10 per month, with Freeview Play catch-up and pay-as-you-go options

<table>
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<th>Netgem TV</th>
<th>Sky TV</th>
<th>Virgin Media TV</th>
<th>BT TV</th>
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| **Content included**   | 200+ channels Incl. Premier sports (worth £12.99) 50,000 hours of on Demand | 180 channels  
- Sky one etc  
- Discovery, History, MTV etc | 100 channels  
- Sky one etc  
- Discovery, History, MTV etc | 80 channels  
- Sky one etc  
- Discovery, History, MTV etc |
| **Content Add ons**    | 40+ apps including Prime Video, and 10+ totally free | 15 apps  
Nothing free - No Britbox | 7 apps  
Nothing free - No Britbox | 15 apps  
Nothing free  
YT kids etc |
| **Box and mobile TV**  | 4K / HDR definition  
Worth £149 Award-winning Voice Control with Alexa  
WiFi - no need ethernet  
Universal search and personal recommendations  
Unlimited mobile/tablets | Sky Q 4K / HDR  
Dish required (not weather proof)  
No WiFi  
**Sky Go extra: £5/m and 2 devices only** | V6 Box 4K / HDR  
No Voice Control  
No WiFi  
2 cumbersome apps (one to view, one for remote!)  
2 devices at one time only | Youview HD - so old you can’t open the apps properly  
No Voice Control  
No WiFi  
2 devices at one time only |
| **Price**              | £10/m  
no upfront | £25/m  
£20.00 upfront | £25/m  
£35 upfront | £12/m  
£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!

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’

✓ 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

Our awarded UIX
Universal search
Find & Cast from mobile
Works with Alexa & Google Voice
Our ‘Super-aggregator’ service in the UK
Truly ‘myTV’ (relevant personalisation)

‘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
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

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**Netgem Cloud services**
- DRM, entitlement, geo-locking & geo-variants

**CDN**
- (Akamai, Verizon)
- DTT live stream fallback
- Geo-location, geo-variants, entitlement

**Metadata**
- Live 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

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**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)

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Architecture in place for the UK market:
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:

- **Virgin**: 5m
- **BT**: 9m
- **Sky**: 6m
- **TalkTalk**: 4m
- **ISP AltNets**: 3m

CAGR

- +2%
- -2%
- +0%
- +1%
- +21%

Source: POINT.**topic** July 2021

AltNet Full Fibre ISPs Target 29.9 Million UK Premises by 2025

7M = 25% UK households
15 Alternative Fibre ISPs have already launched with Netgem TV in UK & Ireland:

Netgem and Origin Broadband partner to launch Origin TV

Netgem launches low cost multiscreen service
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)

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

Adding OTT Linear, Timeshift, nPVR ...across all screens!
Thank you!