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

25th of January 2022
“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
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!

Source: OFCOM, Jul'19

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

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

![BBC licence fee paid by 250,000 fewer people](image)

...or...

![Netgem TV interface](image)
The ‘best of free TV’ and the ‘best of Pay TV’

Our 4 values at the heart of the next-generation TV service in the UK:
Leading UK innovation with **HbbTV & Freeview Play** at the heart:
*From a Broadcast friendly box to a Broadcast friendly service...*

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**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!

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**1st**

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

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

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**“Most advanced TV service”**

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**“Best interactive TV application”**
## Netgem TV

### Content included
- 200+ channels
  - Incl. Premier sports (worth £12.99)
  - 50,000 hours of on Demand

### Add ons
- 40+ apps
  - Including Prime Video, and 10+ totally free

### 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

### Price
- £10/m
  - No upfront

## Sky

### Content included
- 180 channels
  - Sky one etc
  - Discovery, History, MTV etc

### Add ons
- 15 apps
  - Nothing free - No Britbox

### Box and mobile TV
- Sky Q 4K / HDR
  - Dish required (not weather proof)
  - No WiFi
  - Sky Go extra: £5/m and 2 devices only

### Price
- £25/m
  - £20.00 upfront

## Virgin TV

### Content included
- 100 channels
  - Sky one etc
  - Discovery, History, MTV etc

### Add ons
- 7 apps
  - Nothing free - No Britbox

### Box and mobile TV
- V6 Box 4K / HDR
  - No Voice Control
  - No WiFi
  - 2 cumbersome apps (one to view, one for remote!)
  - 2 devices at one time only

### Price
- £25/m
  - £35 upfront

## BT TV

### Content included
- 80 channels
  - Sky one etc
  - Discovery, History, MTV etc

### Add ons
- 15 apps
  - Nothing free
  - YT kids etc

### Box and mobile TV
- Youview HD - so old you can’t open the apps properly
  - No Voice Control
  - No WiFi
  - 2 devices at one time only

### Price
- £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!

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

Find & Cast from mobile
Works with Alexa & Google Voice

Universal search

Our awarded UIX

Replace with your title (short & impactful),
Add a subtitle if your title is long (optional)
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

**Architecture in place for the UK market:**

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

- **CDN** (Akamai, Verizon)
  - Cache management, live streams distribution
  - DTT live stream 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)

- **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)

- **CDN**
  - Cache management, live streams distribution
Our market: all Fibre Altnets + TalkTalk = 25% UK households!

Broadband Households in the UK:

- Virgin Media: 5m
- BT: 9m
- Sky: 6m
- TalkTalk: 4m
- 15 Fibre ISPs with Netgem TV (...and more to come on board!)

CAGR:
- +2%
- -2%
- +0%
- +1%
- +21%

Source: POINT topic July 2021

AltNet Full Fibre ISPs Target 29.9 Million UK Premises by 2025

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

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**

**October 2020**

**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 offering the best streaming experience across TV and combining popular TV channels and VoD content with movies and series such as Amazon Prime with others.

**Enjoy a night in!**

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

**November 2020**

**TalkTalk UK Sign Netgem Deal to Launch 4K TV Service**

*October 2021*

TalkTalk UK, broadest ISP TalkTalk has today officially signed a contract with pay TV solutions provider netgem, which will see the provider launch a new “TV Anytime” product for their 4.2 million customers that will be powered by the Netgem TV platform and an app for “convenience, flexibility and operating costs.”

The service, which sees the launch at new, BT service, marks a significant step away from the provider’s long-running use of the YouView (iPTV) platform (something they originally helped to develop alongside BT and the BBC, etc.). Such a move wasn’t entirely unexpected, as the ISP has historically been keen to add real Pay TV products (like BT)

Netgem TV’s box and service have already been broadly adopted by a growing number of UK ISPs, particularly smaller alternative networks that lack the funding to develop their own bespoke platforms. This set-top-box, that they provide - Network HD and Network UK - tend to be similar to those supplied by rival video streaming companies, including the usual array of premium content (sports, apps (Amazon, BT Sport, Sky), Rakuten TV, YouTube etc.), free-to-air channels ( ITV, Channel 4 and catch-ups content).
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)

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

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

**Viva by Videofutur**
- Launch first version of ‘Freeview over IP’ with BBC, ITV, Channel 4, and Channel 5 main channels in 2022
- Leverage technology developed for the french market (TF1, France.tv, M6...) for ‘Viva by Videofutur’ as a full TV ‘Multi-screen’ service
Thank you!

“Best user experience for Video Streaming service”

“Most advanced TV service”

“Best interactive TV application”