

SIEMENS

Communications, Media & Technology

Multi-Screen-TV and Over-The-Top TV

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Siemens Communications, Media and Technology



'It's just a website'



**September 17, 2005 – The Economist announces
the death of the traditional telephone business**



**The
Economist**

**How the internet killed
the phone business**



'It's just a website...'



25% of international calling minutes (from 12% in 09)

190 Bn minutes per year (40% of this already video)

2way iPhone video app: 4Mio downloads, 1Mio video calls in 24h

560 million total users

28 million people online at peak

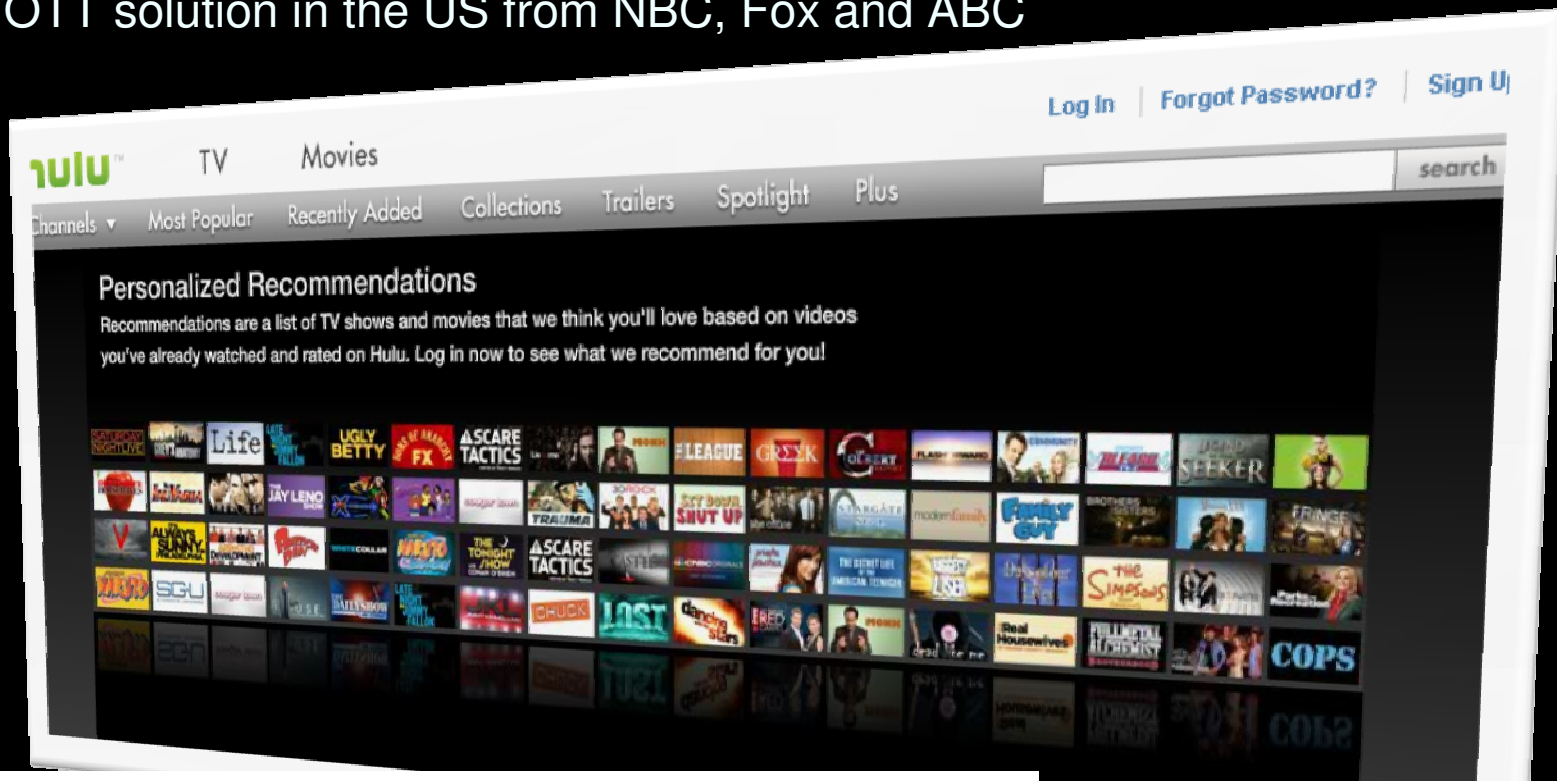
\$830Mio revenue in 2010


Acquired by Microsoft





It's just a website...

hulu – the OTT solution in the US from NBC, Fox and ABC



Recent Episodes

Modern Family: Strangers On a Treadmill
Season 2 : Ep. 4 (21:36) [cc]
[More: Modern Family](#)
[Comedy](#)

Popular Clips

The View: Hot Topics: Erin Andrews
Excerpt (01:58) [cc]
[More: The View](#)
[Talk and Interview](#)

Featured Content

Tangled - Trailer 2
Trailer (02:31)
[More: Movie Trailers](#)

My Videos
Catch a Sneak Peek
"Tangled," the hilarious tale that takes adventure to new lengths, comes to theaters Nov. 24 in Disney Digital 3D.

- more than 10 million regular viewers
- \$100 mio revenue in 2009

It's just a website...

iPlayer – the OTT solution of BBC in UK

The screenshot displays the BBC iPlayer website interface. At the top, the BBC logo is followed by navigation links: Home, News, Sport, Weather, iPlayer, TV, Radio, and More... A search bar is located to the right. Below the navigation bar, the iPlayer logo is prominent, with TV and Radio tabs. A 'Radio Favourites' section shows 0 items, 0 new, and 0 expiring, with a 'Manage' button. The main content area is divided into 'Featured' and 'Most Popular' sections. The 'Featured' section highlights 'Guy Garvey's Rainy City' with a photo of Guy Garvey and a description: 'Elbow frontman Guy Garvey presents a profile of Manchester and discovers how it's become the workshop of the world and a powerhouse for progressive culture and politics.' The 'Most Popular' section lists several programs: 'The Archers' (14/10/2010), 'Radio 2 In Concert' by Sheryl Crow, 'Richard Herring's Objective' Episode 1, 'The Chris Moyles Show' Thursday - with S..., 'The Unbelievable Truth' Episode 3, and 'An Odd Body' 1. Talking Poison. On the right side, there is a 'Radio Stations' section with a 'LISTEN LIVE' button and a 'TUE WED YESTERDAY TODAY' selector. Below this, a list of radio stations is shown, including BBC Radio 1, BBC Radio 1Xtra, BBC Radio 2, BBC Radio 3, BBC Radio 4, BBC Radio 5, BBC Radio 5 Live, BBC Radio 6, BBC Radio 7, BBC Radio A, and BBC World Service. The list of stations includes program details: 6:30am The Chris Moyles Show, 10:00am Fearne Cotton, 12:45pm Newsbeat, 1:00pm Greg James, 4:00pm Scott Mills, 5:45pm Newsbeat, 6:00pm Scott Mills, 7:00pm Zane Lowe, 9:00pm In New DJs We Trust, 10:00pm Nick Grimshaw, and 12:00am Kissy Sell Out.

- 1.4 million hits per day
- 3.5 million content requests per day
- BBCs top revenue generator

It's just a website...

maxdome – the biggest OTT portal in Germany from ProSiebenSat1 Media



■ more than 2 million users in germany

■ \$ 6,5 mio ad revenue per month

The past: IPTV

e.g. IPTV in Belgacom and KPN

belgacom TV

Lassie.

9:05-15:30
Geen beoordeling

Amerikaanse
familiereeks. Met
Robert Bray (Corey
Stuart), Clyde Howdy (Hank)... Hanks tante
Sam komt in de buurt ...



Tv-gids

vr aug 27 13:43

| ◀ vr. aug 27 ▶ | | 14:00 | 14:30 | 15:00 |
|----------------|---|--|----------------------------|-------|
| Zoeken | | Zoek in de tv-gids | | |
| Op aanvraag | | Selecteren om naar op aanvraag te gaan | | |
| Promoties | | Bekijk de promo-pagina | | |
| TV1 | 1 | 50 jaar. Ker... | 50 jaar. Centraal Station. | |
| KetCan | 2 | Lassie | | |

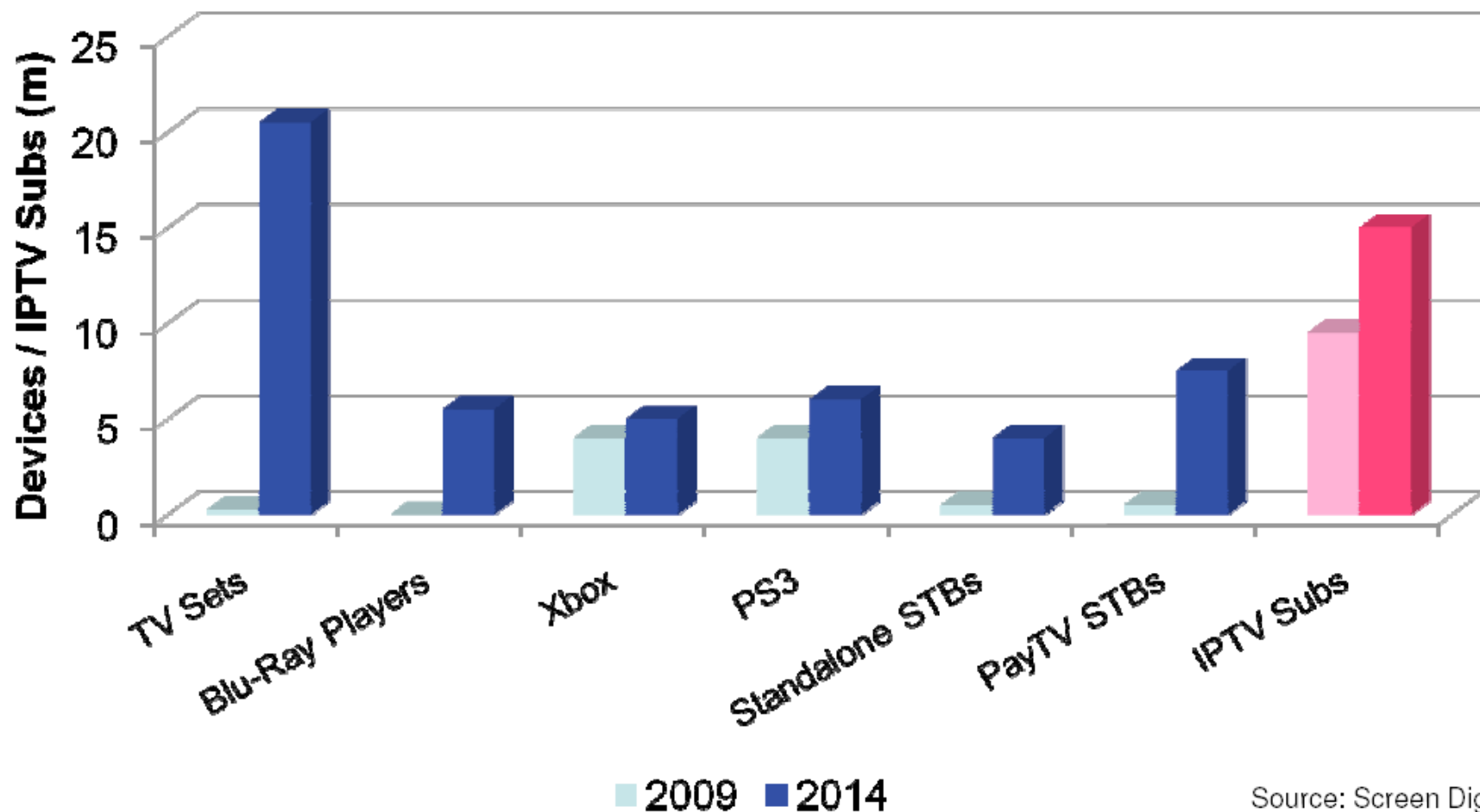
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The Future: Over-The-Top Television

CONNECTED DEVICES WILL OUTSTRIP IPTV SUBS BY 2014

Europe 'Big 3': Active connected devices vs IPTV subscribers (m)



Source: Screen Digest

Current thinking. Subject to change.

BTwholesale

Market trend: Multiscreen OTT

■ Multimedia PC



■ Smartphone



■ Tablet PC



■ Interactive TV



The multiscreen opportunity brings many technical challenges

- different screen size and screen resolutions



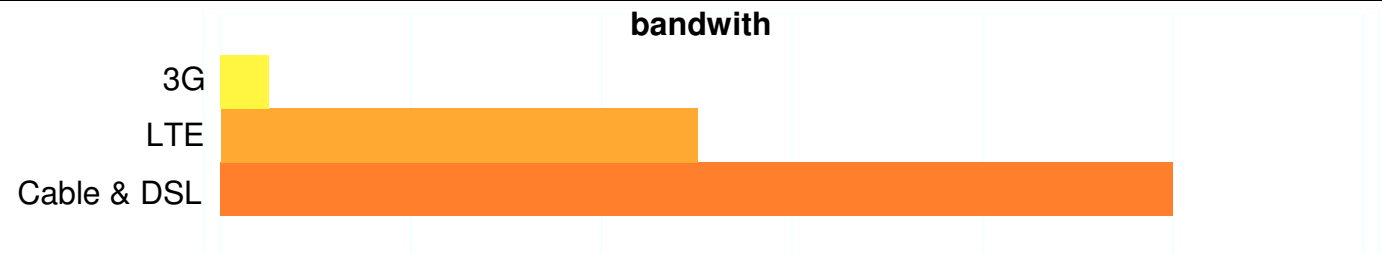
- OTT support of multiple device platforms ...



- different codec support



- different access networks



Where Siemens is going...

600 million+ mobile
subscribers in India (that's **51%** of
the total population); penetration -
50% higher than that of TV

Under the joint brand 'dittoTV' ZeeTV and Siemens will launch in India, USA, UK, etc.



ditto^{TV} has partnered with Siemens : a leading inventor, innovator and implementer of leading-edge technology enabled solutions across the world.

ZEE TV is one of India's leading Media & Entertainment companies and one of the largest producers and aggregators of Hindi programming globally.

- 25 TV channels
- 17 beams in 167 countries
- 500mn + viewers
- 100.000 + hours of TV content
- 3000 movie titles
- World's largest Hindi film library

Ditto TV will become the largest TV Network on Earth



Over-the-TOP-TV

powered by

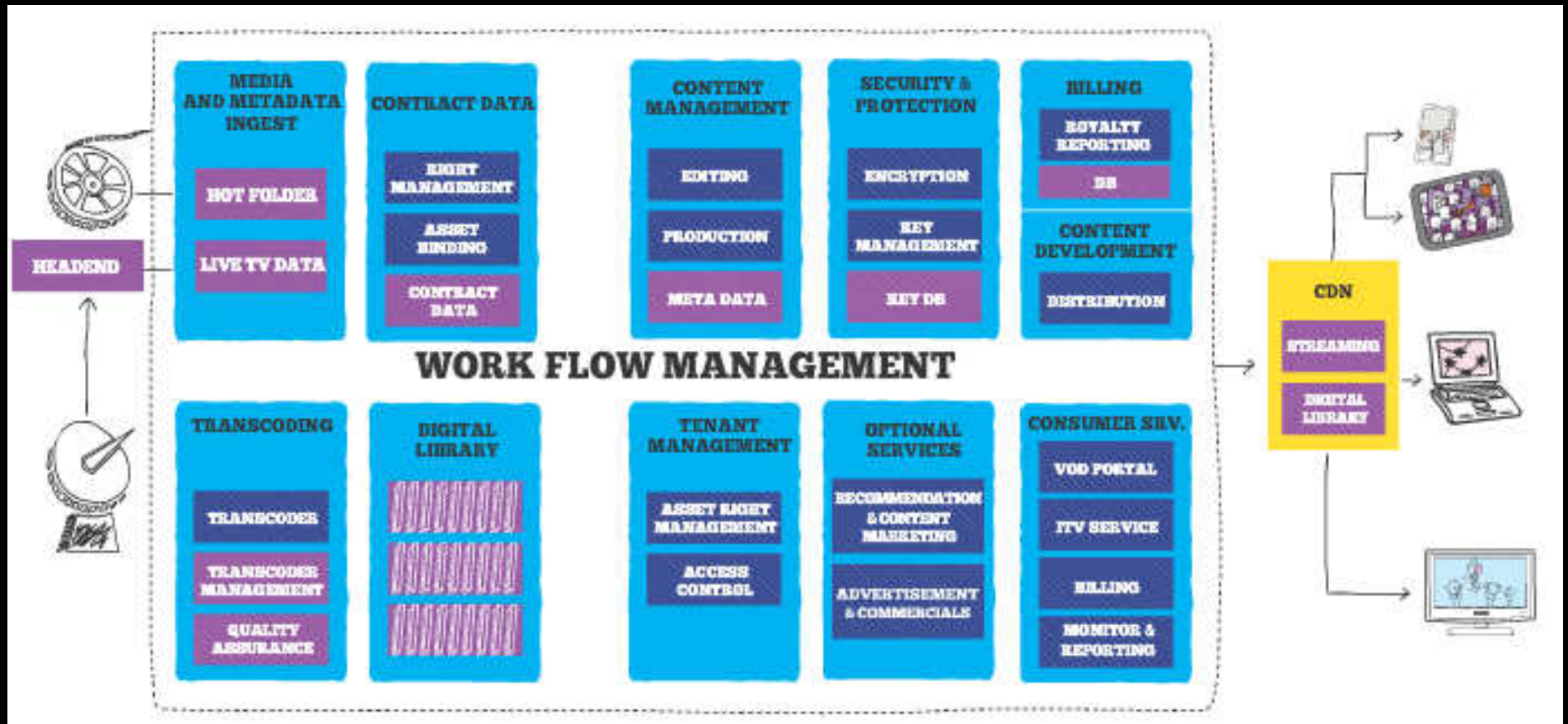
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- 100 Live TV Channels
- Video On Demand
- Catch-up TV
- Worldwide Playout
- Multiscreen playout to Smartphones, Tablets & PC and TVs
- Android, iOS, Blackberry, Windows Phone 7, HTML5, Symbian

- **Content:**
 - **live channels: up to 100**
 - **VoD: more than 30.000 hours**
- **Ramp up:**
 - **expected no. of OTT viewers:**
 - **2012 > 100.000**
 - **2013 > 1 mio**
- **Go live**
 - **Alpha release: October 25, 2011**
 - **Public Beta: November 2nd, 2011**
 - **Public: February 23rd, 2012**

Zee is tackling this market opportunities by putting all its trust and faith in the E2E OTT solution of Siemens CMT



Zee Entertainment selects Multi-screen Solution „Over-The-Top TV“ from Siemens Communications, Media and Technology

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26 UNTERNEHMEN & MÄRKTE

Siemens goes Bollywood

Der Münchener Technologiekonzern will in das Geschäft mit dem Internetfernsehen einsteigen und verbündet sich dafür mit einem der größten indischen TV-Konzerne.

Axel Höpner, Sandra Louven
München, Düsseldorf

Das Telekommunikationsgeschäft war einst die Wurzel des Siemens-Konzerns. Viel geblieben ist davon nicht. Die Handysparte ging nach dem Verkauf an BenQ pleite, die Schnurlostelefone Gigaset gehören inzwischen einem Finanzinvestor, das Gemeinschaftsunternehmen Nokia Siemens Networks kränkt vor sich hin.

In Österreich aber betreibt der Konzern – abseits vom Stammgeschäft in den drei Sektoren – noch eine kleine, aber feine Telekommunikations- und Medieneinheit. CMT (Communication, Media & Technology) heißt die und hat große Pläne: Nach Informationen des Handelsblatts will die Siemens-Tochter gemeinsam mit dem indischen TV-Riesen Zee TV im großen Stil das Fernsehen über das Internet voranbringen. Das Bündnis soll heute verkündet werden. Damit be-



Bollywood-Romanze „My name is Khan“: Siemens will mit dem indischen Produzenten Zee TV das Fernsehen über das Internet voranbringen.

Damit können Fernsehinhalte über das Internet direkt auf den Computer, das Fernsehgerät, das iPad oder das Multimediaphandy gebracht werden. „Das verändert die Regeln des Geschäfts“, sagt Siemens-Manager Jenzowsky. Bislang war für die Übertragung auf die Ge-

Als Referenzkunden hat Siemens einen großen Player gefunden. Die indische Zee Entertainment betreibt mehr als 100 TV-Programme, gehört zu den großen Bollywood-Produzenten und hält nach eigenen Angaben die Rechte an mehr als 3.000 großen Kinofilmen. Der Kon-

TV-GESCHÄFT IN DEUTSCHLAND

Kabelnetzbetreiber Sie sind mit rund 50 Prozent Marktanteil der größte Anbieter. Ihre Macht ist so schnell auch nicht zu brechen, da sie langfristige Verträge mit Vertriebspartnern geschlossen haben.

Telekomanbieter Sie sind der jüngste Spieler und liefern Fernsehen über das Internet. Das Geschäft läuft schleppend, weil deutsche Kunden nicht bereit sind, für neue Dienste wie zeitversetztes

Over-The-Top TV: how do they earn money?

maxdome

HOME

TV CENTER

MUSIK

SPORT

NIGHTCLUB.DE

SUCHE 

SPIELFILM

SERIE

COMEDY

SHOWS & MAGAZINE

KIDS

DOKUMENTATION

home > abos > premium paket

Abonnement

PREMIUM PAKET
€ 14,99**MOVIE PAKET**
€ 4,99**SERIEN PAKET**
€ 9,99

Video-Guthaben

**BLOCKBUSTER
OPTION**
€ 9,99

30.000 Videos

PREMIUM PAKET
Nur 14,99 € / Monat

VERLÄNGERT!
3 MONATE GRATIS!*
BIS ZU
60 EURO SPAREN!

Das Abonnement für die ganze Familie und den vielseitig Interessierten bietet Top-Spielfilme, Serien, Dokumentationen, Kindersendungen und vieles mehr – alles inklusive! Erhalten Sie vollen Zugriff auf Deutschlands größte Online-Videothek und wählen Sie aus über 30.000 Videos ohne Werbeunterbrechung.

> JETZT 3 MONATE GRATIS*

Inhalte:

- über 2.000 Spielfilme aus allen Genres
- über 8.000 Episoden aus über 120 Serien
- über 2.000 Comedy-Videos aus über 100 Serien
- über 8.000 Sendungen aus über 100 Shows & Magazinen
- über 4.000 Kindersendungen aus über 150 Serien
- über 1000 Dokumentationen

Login

E-Mail Passwort

> Passwort vergessen

> Hilfe

> Registrieren

maxdome
GRATIS
ALLE GRATIS VIDEOS

**PREMIUM
PAKET**
30.000
Videos **3 MONATE
GRATIS!**

MAXDOME TOUR
ALLE FUNKTIONEN
AUF EINEN BLICK!

MAXDOME IM ABO

NIGHTCLUB.DE

✓ AB 23 UHR OHNE ALTERSVERIFIKATION HIER DIREKT EROTIKFILME ANSEHEN!
✓ SICHERE UND DISKRETE BEZAHLUNG

COUNTDOWN 06:10:19

VERBLEIBENDE ZEIT BIS 23 UHR

REGISTRIEREN HILFE MEIN ACCOUNT

PLAYBOY

ABO: EROTIK PAKET

PAY PER VIEW:

SOFT

HARD

GAY

WEBCAMS

EROTIK HIGHLIGHTS

TOP THEMEN

Fun-Bully

Kalea ist willig ...

Latex Special

Es wird eng...

Lia's First Time

Lia ist süß ...

Hollywood Special

Promis treibens wild...

Erotikstars

Heiß und wild ...



Login

E-Mail

Passwort

> Passwort vergessen

> Hilfe

> Registrieren

Suche

Suche

> Expertensuche

NIGHTCLUB.DE TOUR >

EROTIK PAKET >

SCHNELLER ZUM VIDEO >

KRACHER DES MONATS >

JETZT
EINFACHE
ALTERSVERIFIKATION



STARKE MARKEN AUF NIGHTCLUB.DE



daring!

DBM

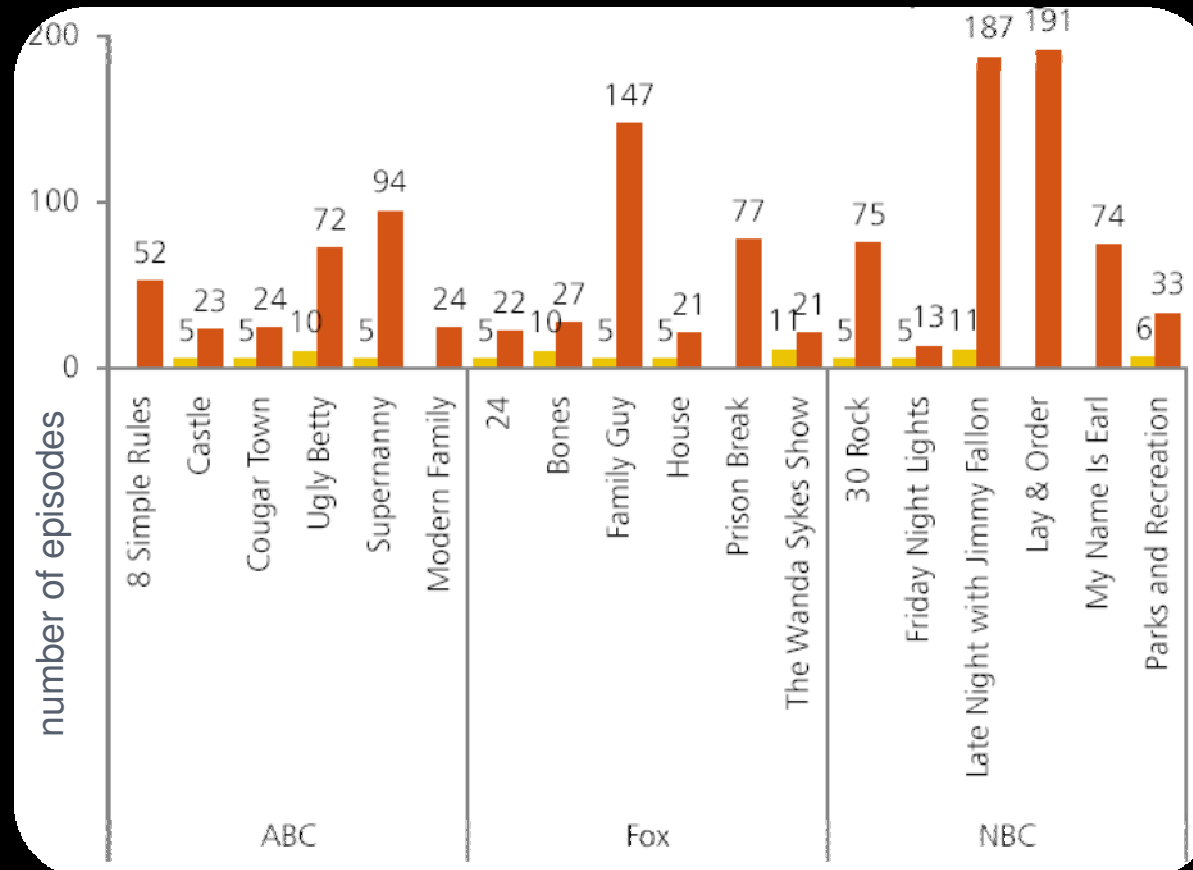


NIGHTCLUB.DE - HIGHLIGHTS



Case study: Hulu HuluPlus: focusing on series

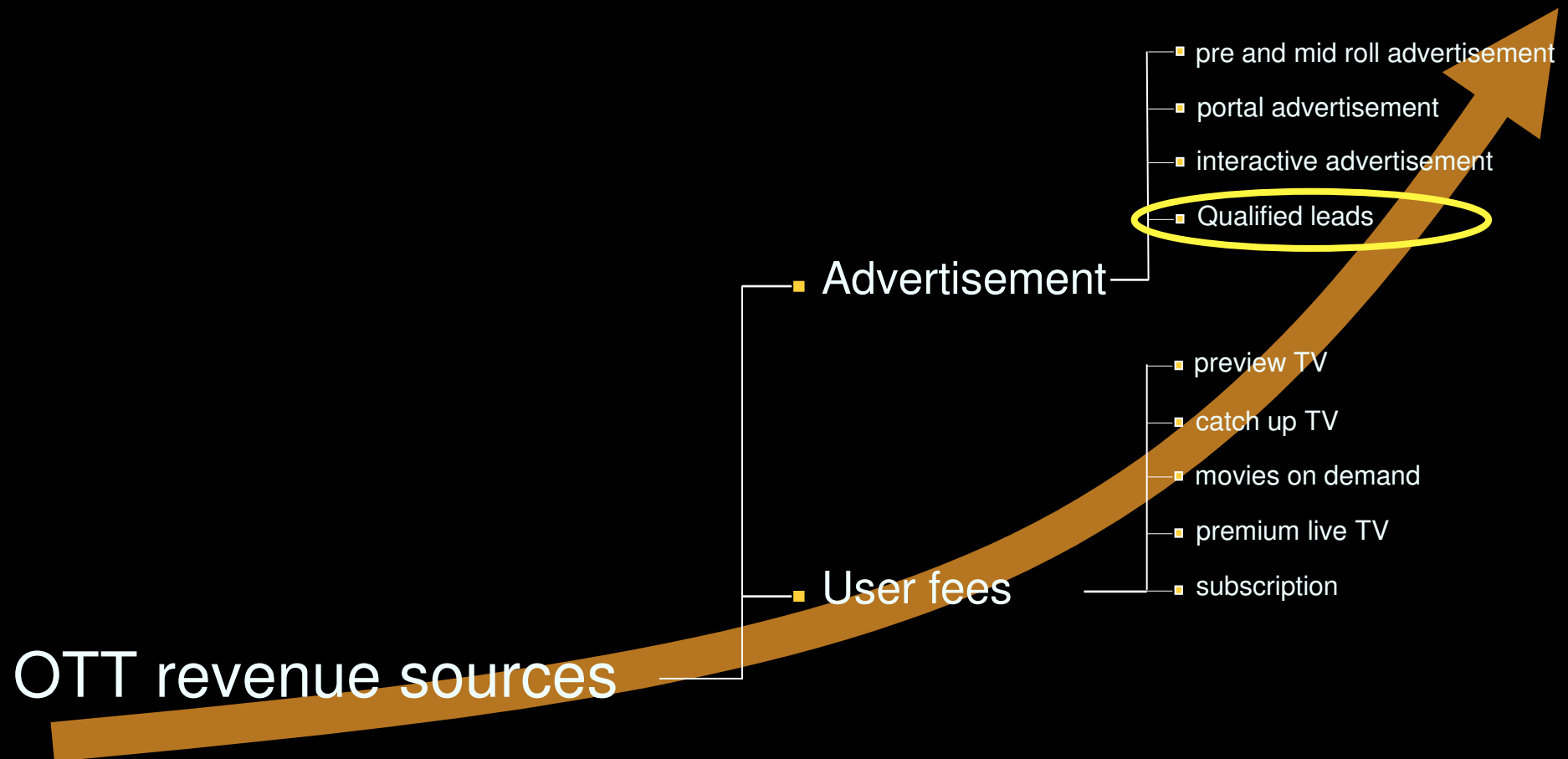
Number of TV episodes on Hulu and HuluPlus in 08/2010



Conclusion

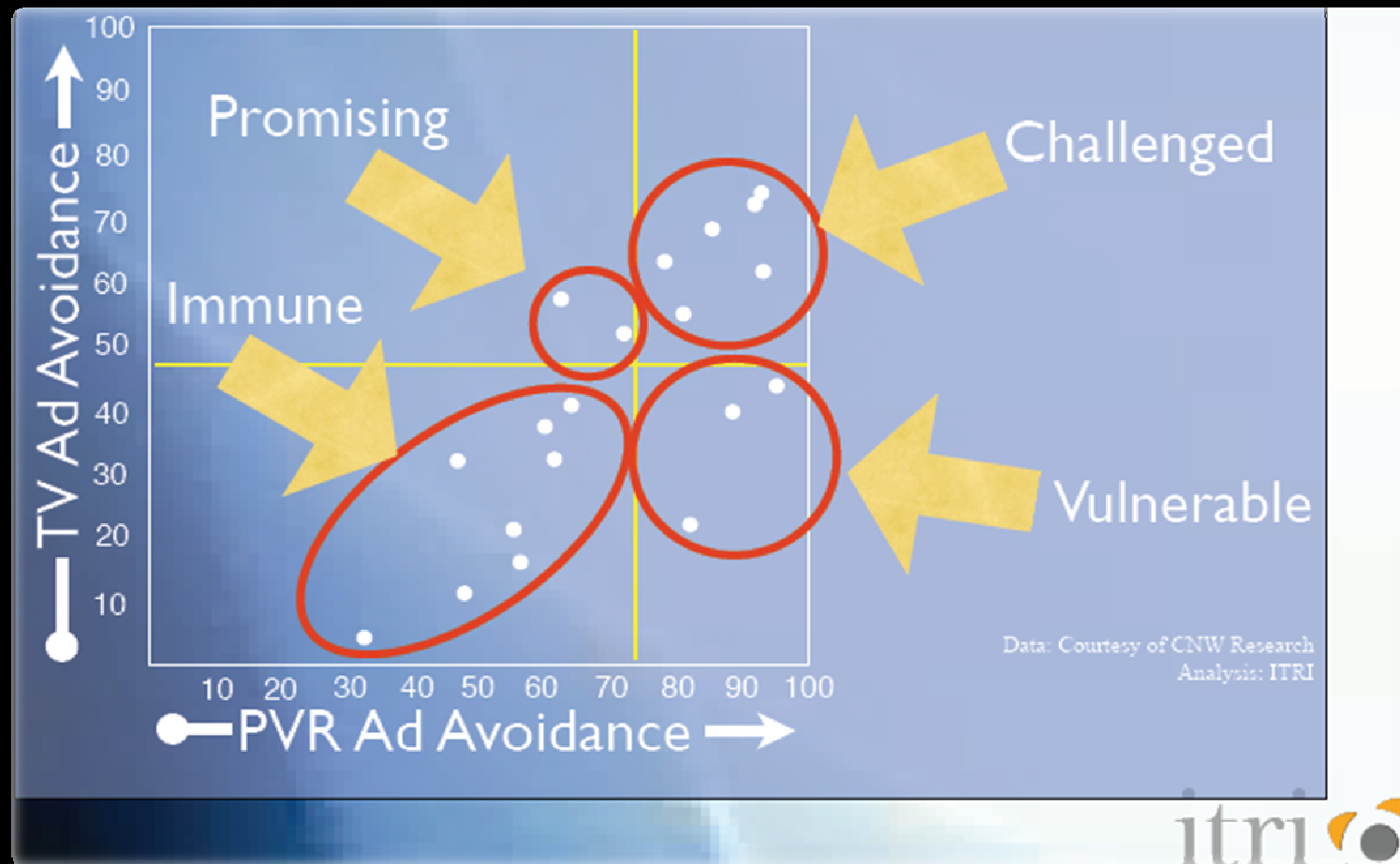
- Hulu (free of charge) offered 24.900 episodes in August 2010
- HuluPlus offered 28.400 episodes in August 2010
- HuluPlus offers a Current Season Ticket
 - All episodes of latest season for \$ 9,99 per month
- HuluPlus library
 - 120 old seasons
 - 2.000 episodes

Over The Top TV: sources of revenue



The Old Guys: The World is Changing for Linear TV and Advertising

Some TV ads are more vulnerable...



Virtual Product Integration



Source: Virtual Product integration (Source: Princeton Video Image, Inc., USA, www.VPI.com)



SFTV Offers Immediate Engagement With TV At Scale



Shazam enables its **150 Million** users to interact with TV in one click, Today!



Consumers are brought to a customized and highly **engaging experience**



Content can link to the mobile web or an integrated **rich media** experience

**Qualified leads & interactivity will
replace CPM
as the main revenue source
for TV until 2015**

**TV Stations will still sleep well
when Google, Facebook, and Shazam will take
TV direct response market**

**When they will wake up it will be too late
Traditional TV will not regain this market**



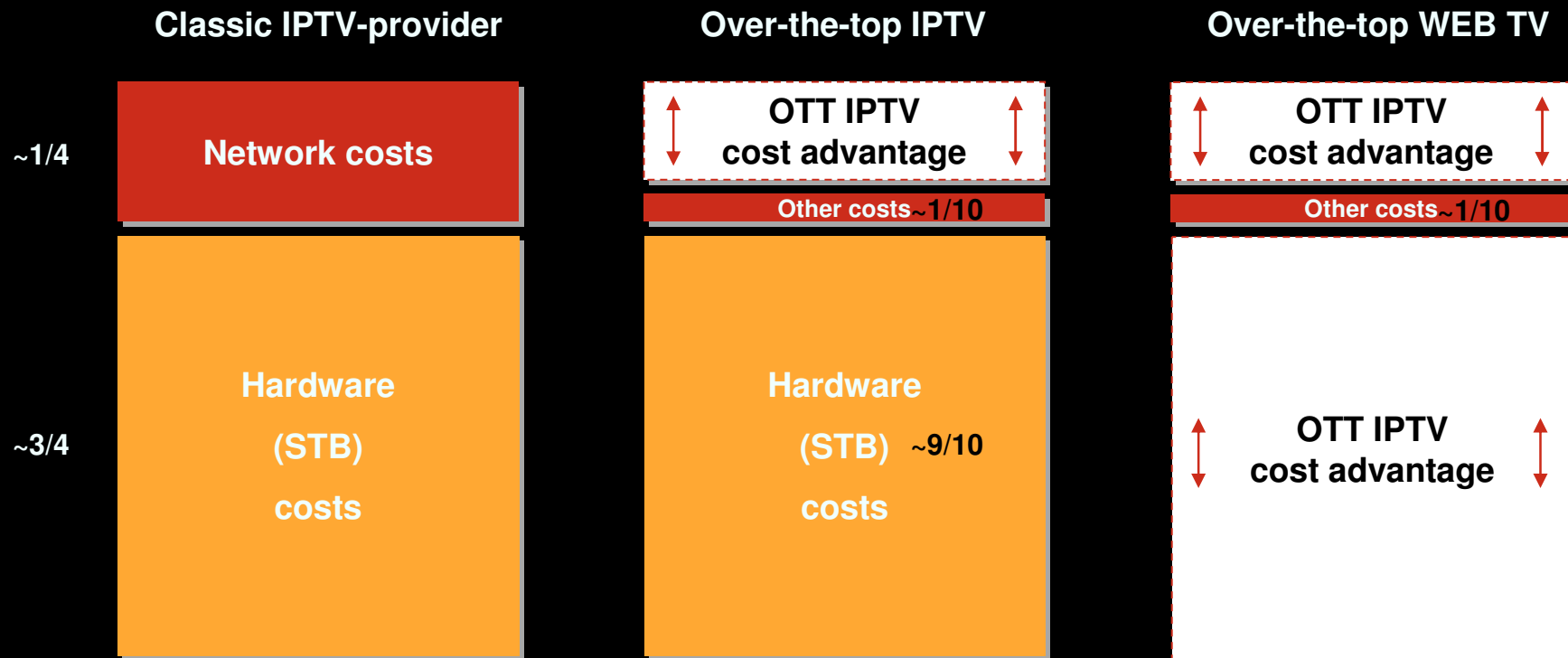
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Over-The-Top Television

Our main research questions:

- Can an App replace the STB?
- Is there a cloud-based loose coupling possible?
- Is there an operator in an app possible?
- How will a dual screen user experience feel?

Cost comparison IPTV vs. OTT TV



Our main research questions:

- Can an App replace the STB?
- Is there a cloud-based loose coupling possible?
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- How will a dual screen user experience feel?

The multiscreen opportunity brings many technical challenges

- different screen size and screen resolutions



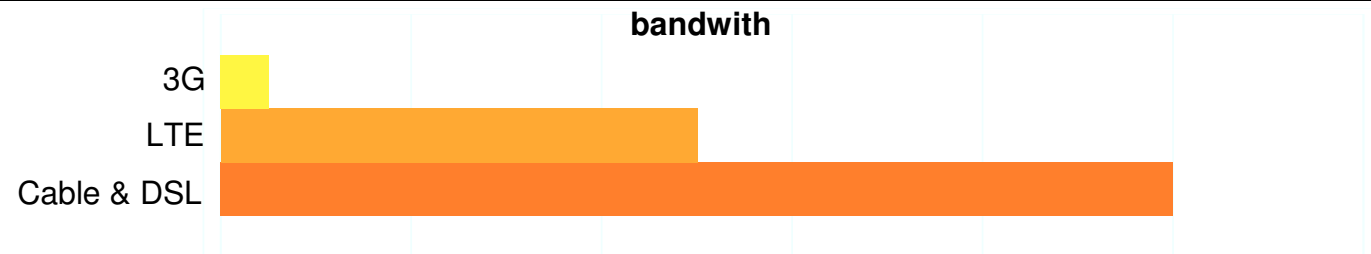
- OTT support of multiple device platforms ...



- different codec support



- different access networks



**Siemens OTT solution has multiscreen capabilities:
Connected TVs and STBs already supported today**



Samsung & LG Connected TVs



Multiple Set Top Boxes



**Philips & Loewe
netTVs**



Sony, Panasonic,
LG etc.

to be released this year

Siemens OTT SWIPE: more than 100 clients



PC / MAC: 2



Tablets: >20



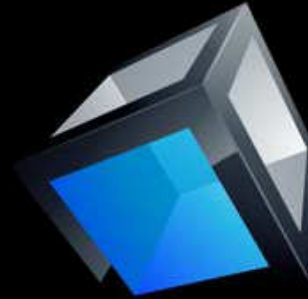
**Connected
TVs: >10**



Smart phones: >90

iPhone & iPad: 2

Siemens OTT TV solution: Screen design - example

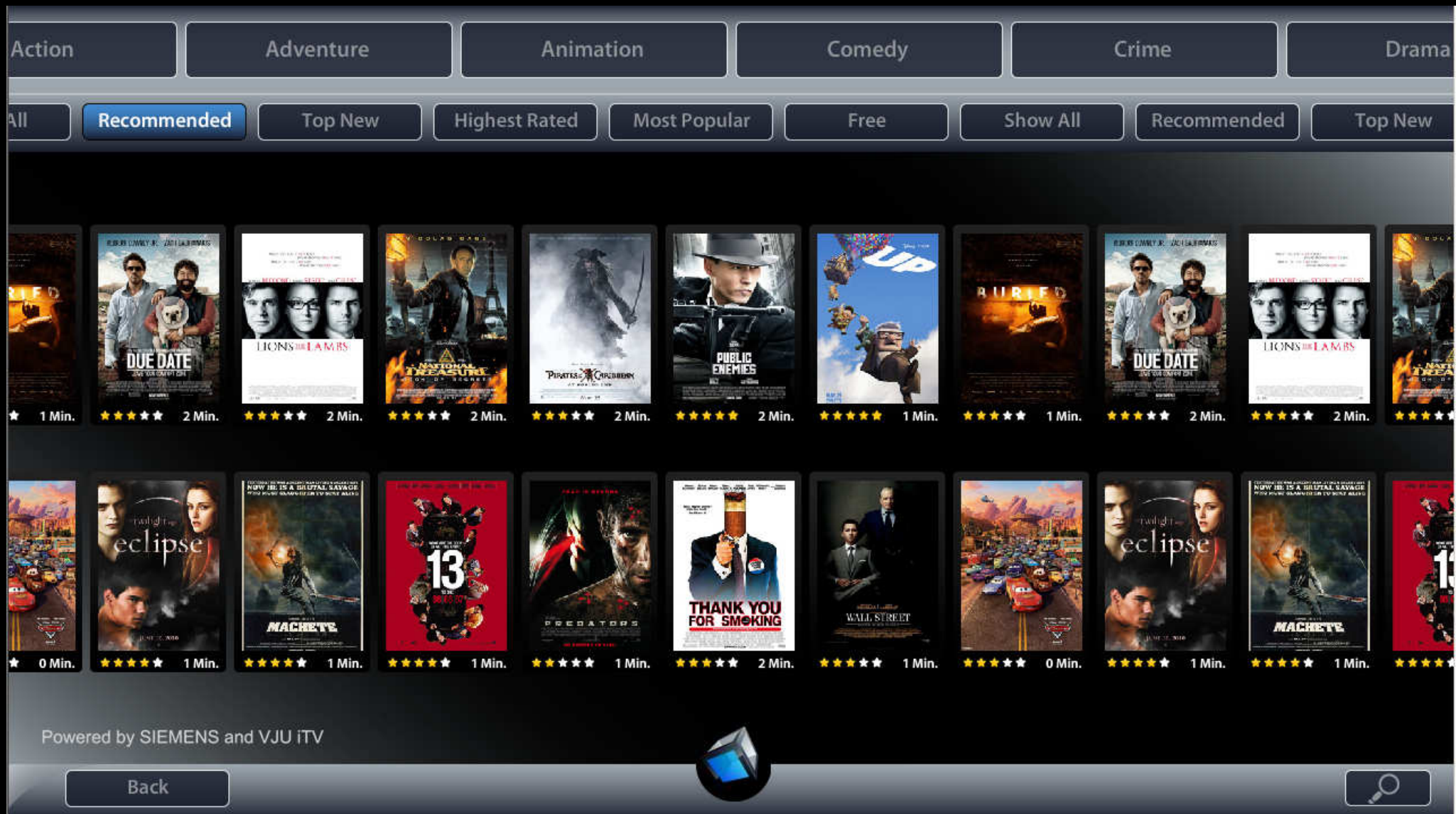


ELYSIUM

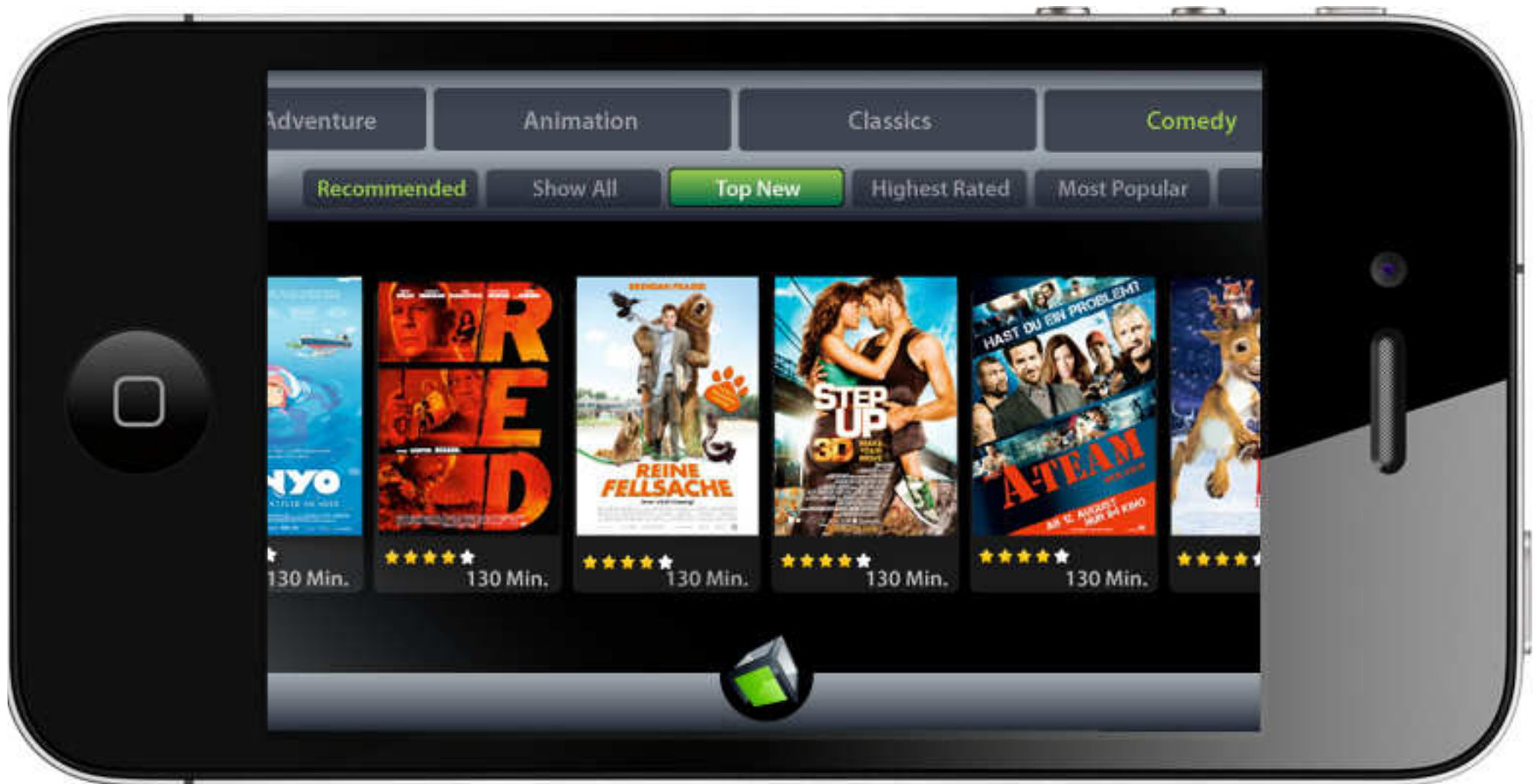
Powered by SIEMENS and VJU iTV



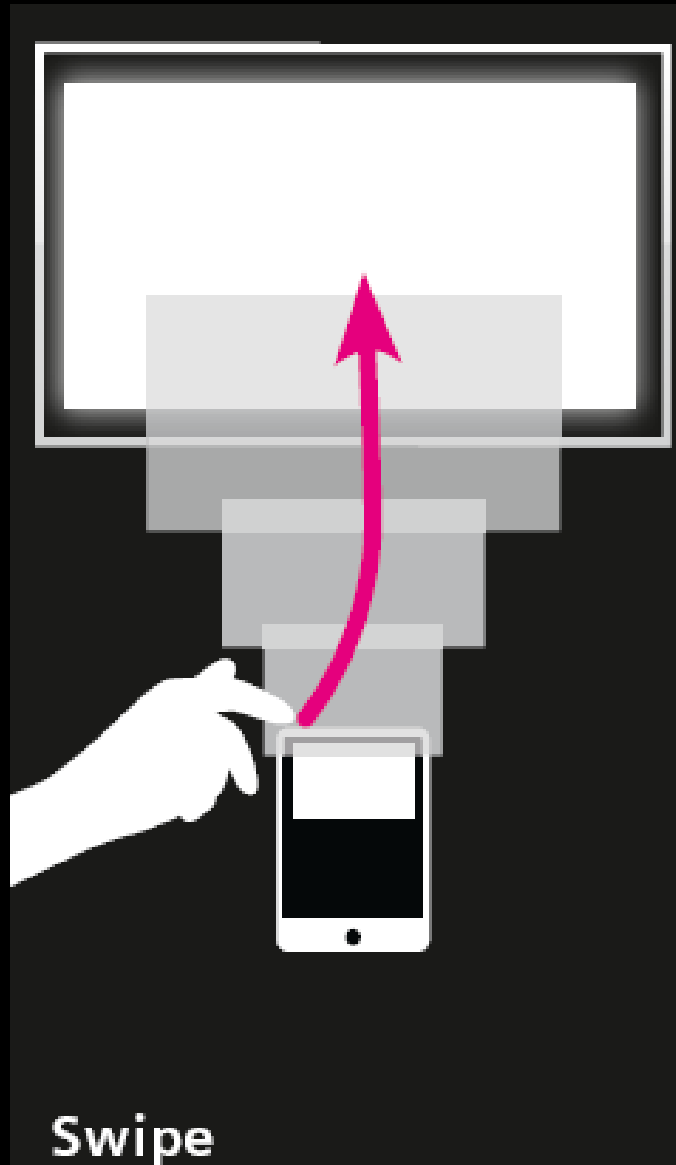
Siemens OTT TV solution: Screen design – example iPad



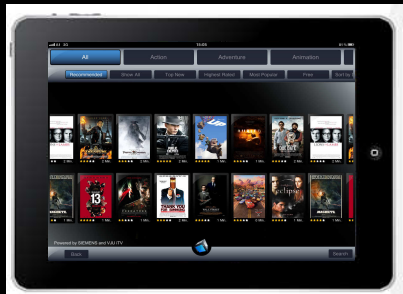
Siemens OTT TV solution: High end screen design – example iPhone



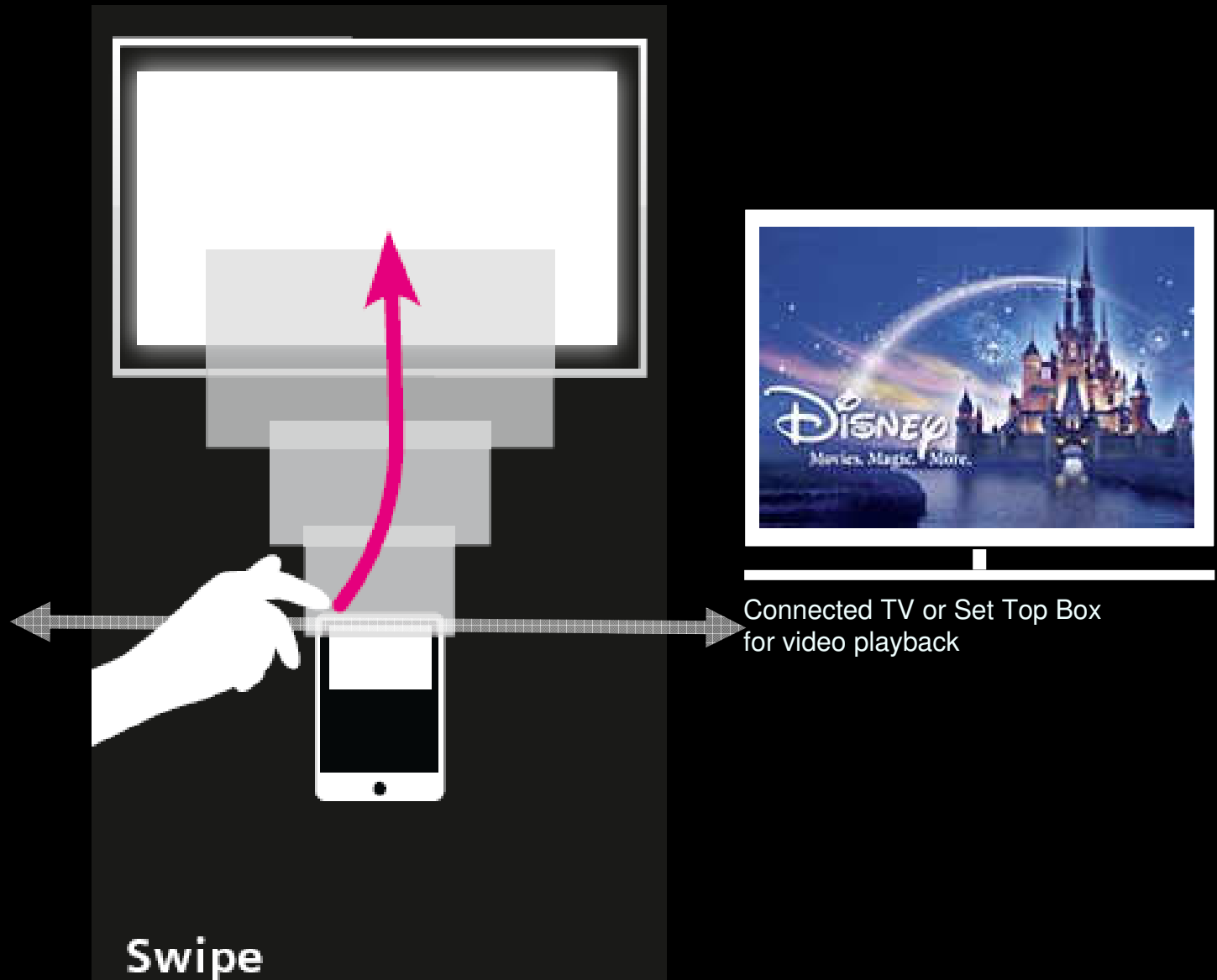
Siemens OTT SWIPE



Siemens OTT SWIPE

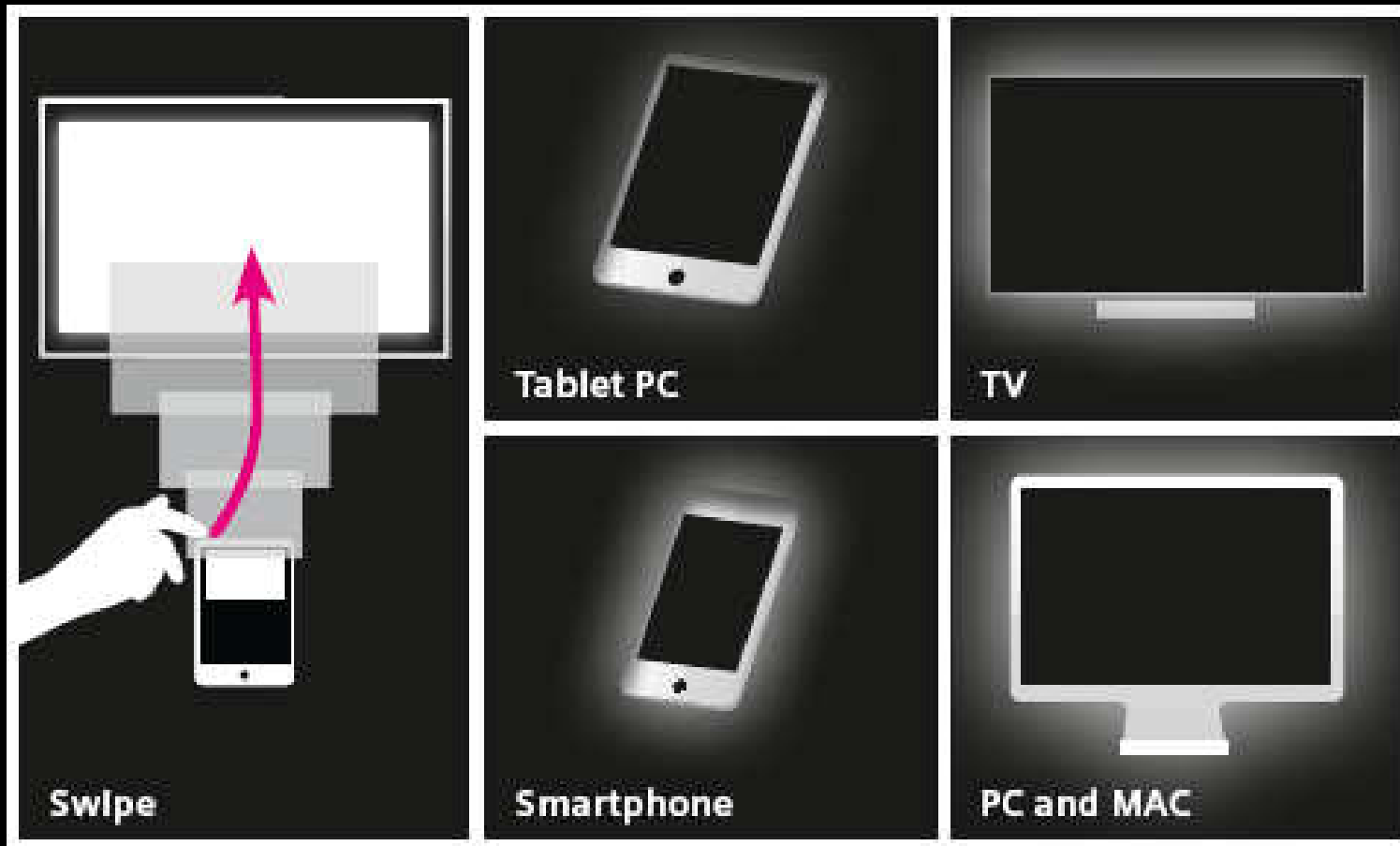


Navigation and video selection
on tablet or smartphone



Connected TV or Set Top Box
for video playback

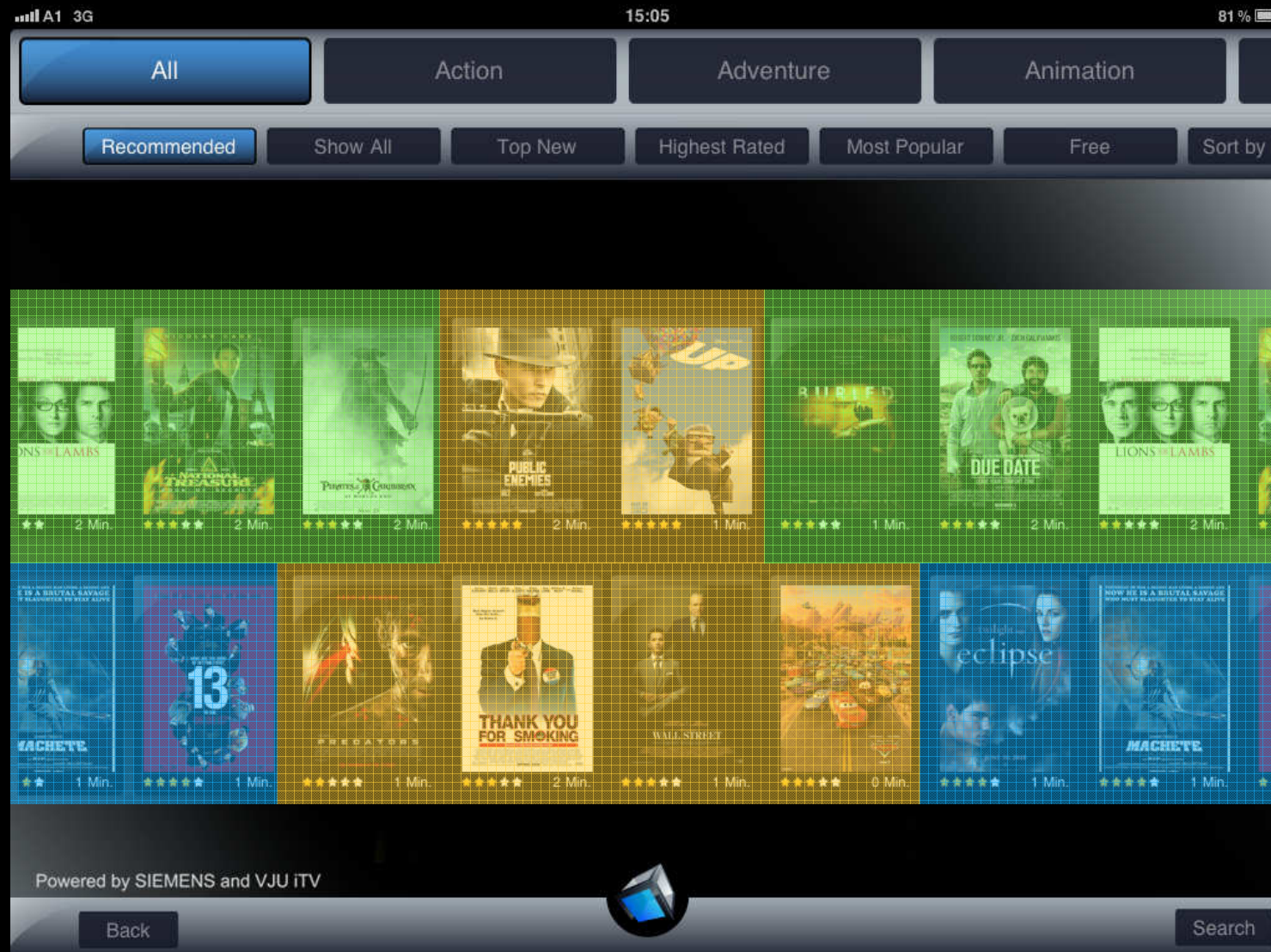
Siemens CMT Over-The-Top-TV solution



Awards for Siemens OTT SWIPE



OTT Managed Service: Maximizing profit by screen real estate optimization



Recommendation categories:

New releases

Pre-roll ad-revenue assets

Minimum commitments not reached or highest margin

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My Tasks

Media Assets

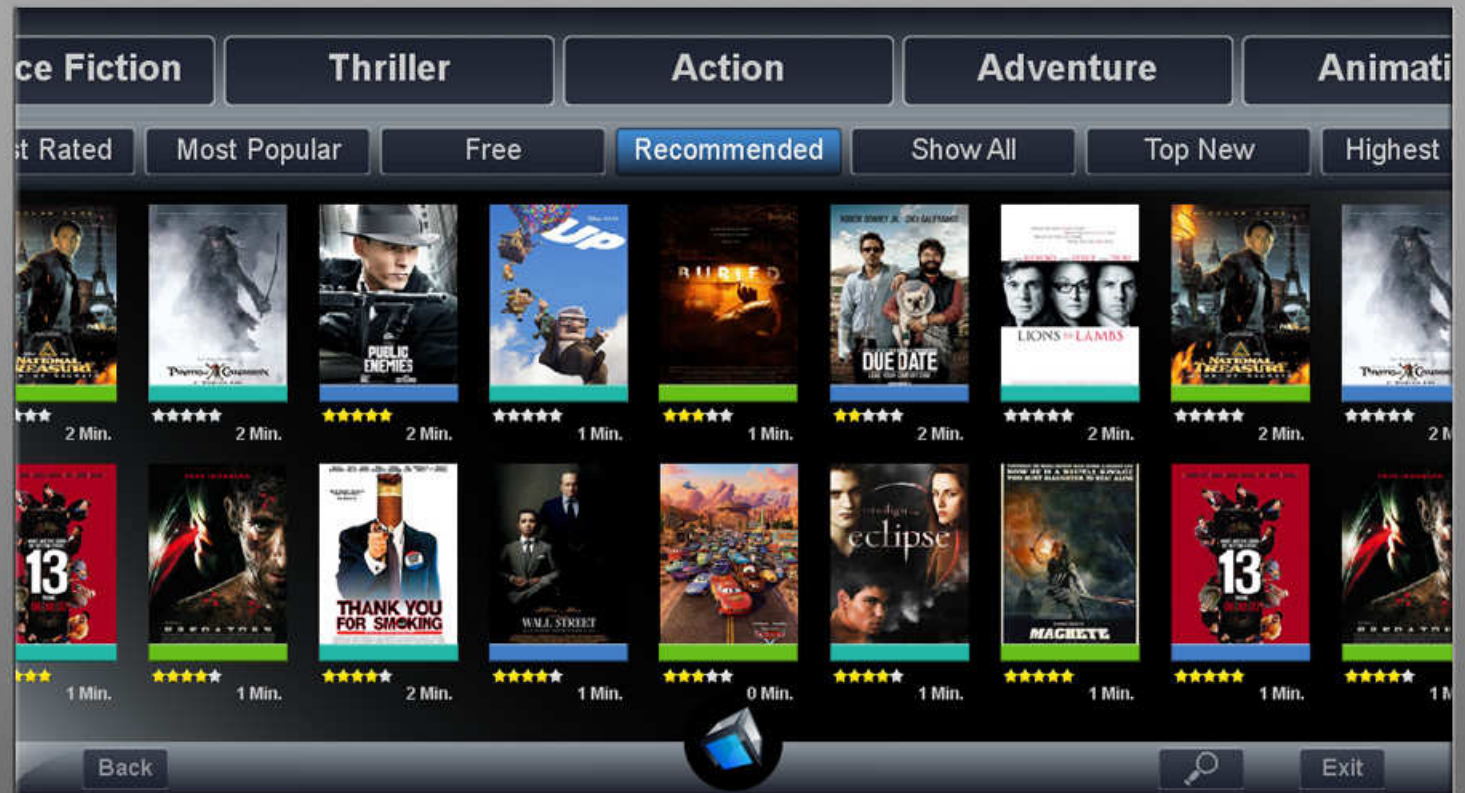
Recommended

Editor 1

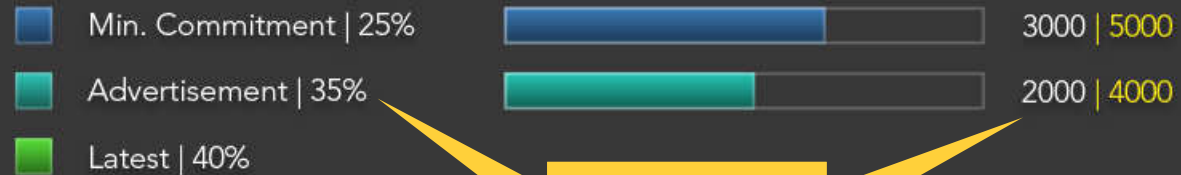
Administration

Preferences

Logout



Recommendation
weighting



Playout target
for selected
periode

Playouts
reached in
selected
periode

Reset

Submit

Our main research questions:

- Can an App replace the STB? **Yes!**
- Is there a cloud-based loose coupling possible? **Yes!**
- Is there an operator in an app possible? **Yes!**
- How will a dual screen user experience feel? **Great!**

TV interactivity will happen on the companion screen as OTT interactivity

As TV interactivity is far too intrusive on the main screen, only single use situations will allow for interactivity on the main screen

...most of this will not be hbbTV or Smart Tv based, but Over-The-Top on your phone & tablet

Growing OTT business needs OTT experts

SIEMENS CMT: Mastering OTT technology

- Deep understanding of all components of OTT and network technology:
 - Ingest, Encoding, DRM, Media Management, Business Systems, Streaming, Playout, Interfaces, Clients, Devices, Next Generation Networks, Policy & Charging, Policy Enforcement, Customer Centricity
- Own products / IPR for key components plus strong partnerships with excellent players

Value proposition to
our customers

Building business in an OTT environment

- **Enable** core player and new entrants to do OTT business (Carrier and Media Industry)
- **Deliver End-to-End solutions** or tailored components for OTT TV (like ZeeTV)
- **Build innovative products** and features (like Swipe)

Defending business in an OTT environment

- Help telcos to transform into a smart pipe company
- Create intelligent traffic management (traffic analysis, prioritisation, dedication)
- Enable telcos to create intelligent subscriber services with customer experience management

Thank
you!

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