

Connected TV

policy and regulatory challenges

EPRA – Cullen International Workshop
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One of the major alternative broadband operators in Italy, providing nationwide quadruple play services.

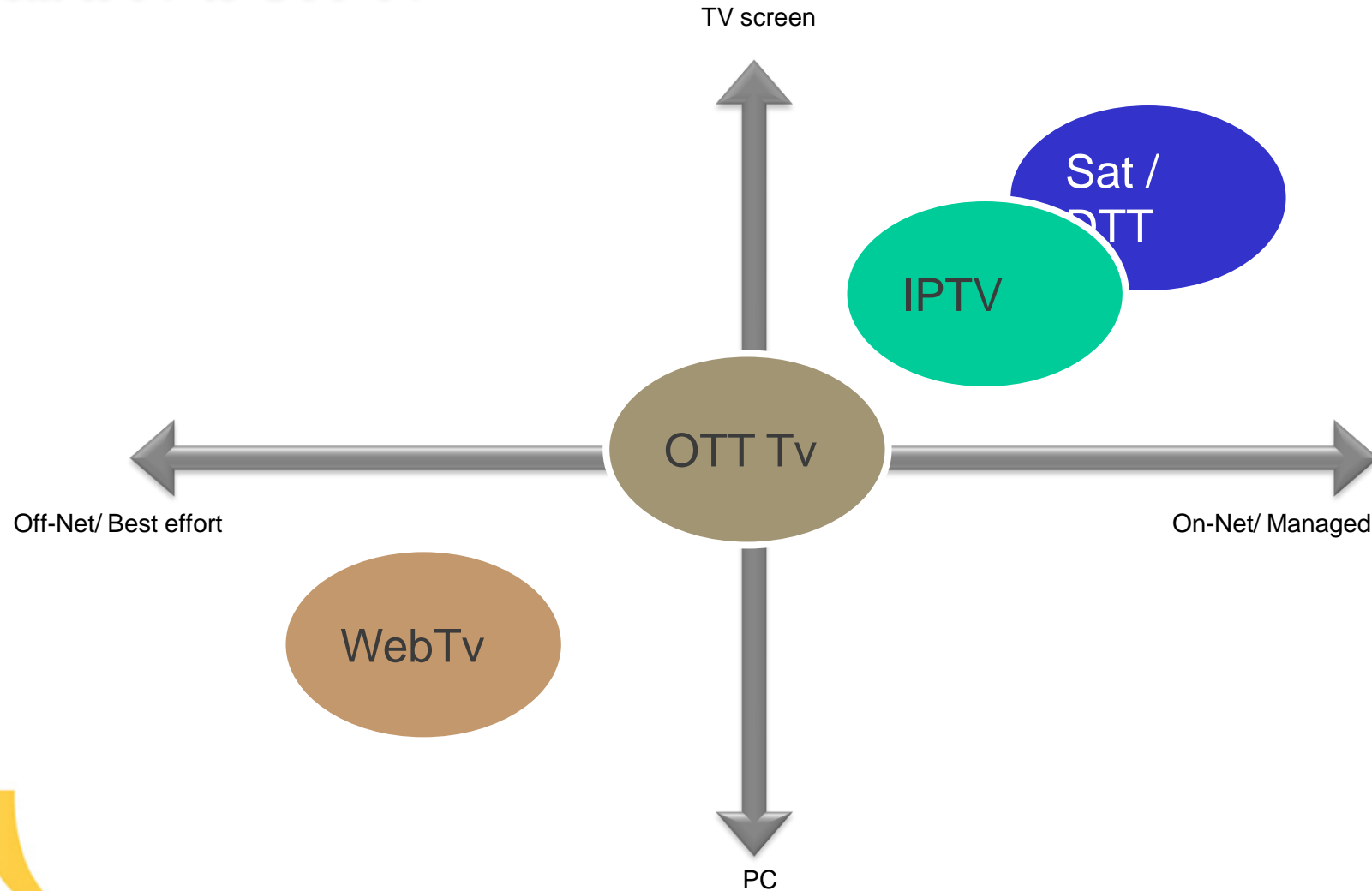
An innovative and state of the art company that has rolled out - first in Europe - its own NGN network in 7 major metropolitan areas in Italy

The first company to develop IPTV and video on demand services in Italy
Market leader in innovation and quality



The evolution of content distribution

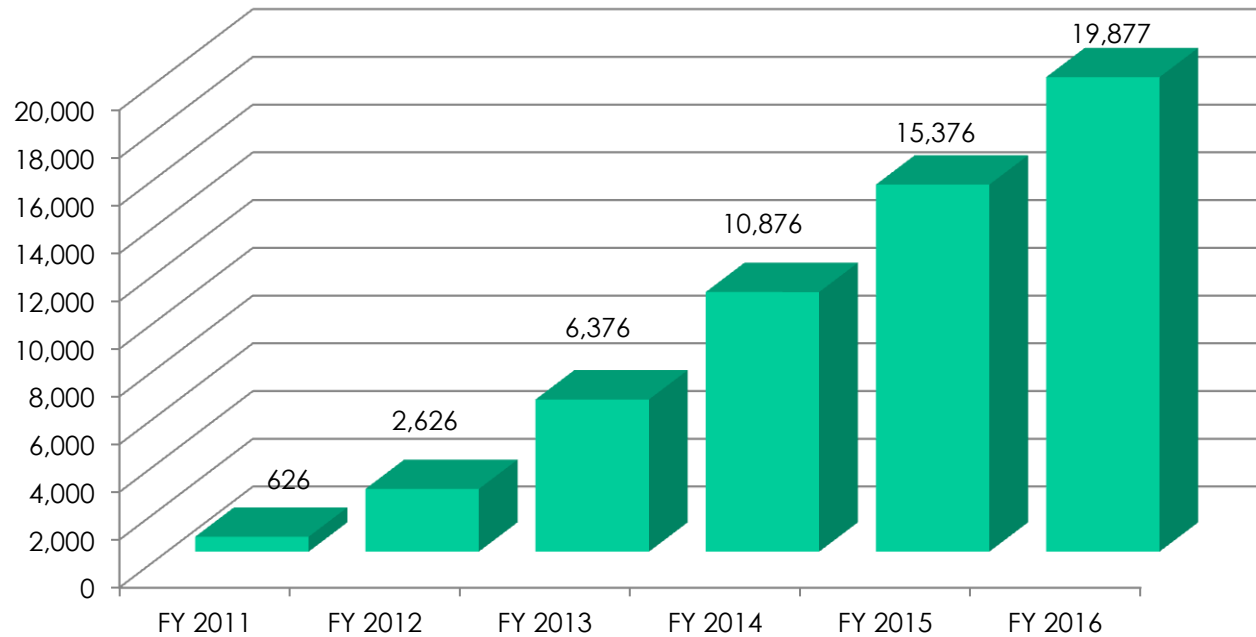
From IPTV to OTT TV



Penetration of Connected TV



Connected TV - Italy (in '000)



Source JFK Monitor 2011

(in '000)	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016
TV - sell out	4.819	5.000	5.000	5.000	5.000	5.001
connected TV %	0,13	0,40	0,75	0,90	0,90	0,90
CONNECTED TV - sell out	626	2.000	3.750	4.500	4.500	4.501
CONNECTED TV - sell out Cum	626	2.626	6.376	10.876	15.376	19.877

The new audiovisual value chain



FASTWEB





sky & FASTWEB
 tv, voce & internet
Home Pack
 da 29€ al mese

SKY CINEMA + [Set-top box] + [Phone icon] + [Email icon]



A VOD catalogue available to all households, irrespective of broadband operator used

No set-top box necessary: VOD service available via multiple connected devices

A free and a premium section including rental and EST.

Users register via Chili web-page creating a personal profile.

To access the premium section the user profile has to be connected with a valid Paypal account

Subscribers get a code to buy/rent content through up to 5 connected devices (digital lockers paradigm)

A multi-device approach

FASTWEB



- ✓ PC
- ✓ Smart TV
- ✓ Blu-ray player
- ✓ DTT Decoder
- ✓ Android Smartphone/Tablet

ASUS

LG

PHILIPS

SAMSUNG

SHARP

Panasonic

TELE System
Electronic

Regulatory issues?



Lack of digital single market → VOD catalogue are not “country specific” and would benefit from EU-wide distribution.

current fragmentation in the commercialization of rights and territorial exclusivity are preventing the creation of scale.

Passive sales should be allowed outside the «country of origin»...

Uncertainties regarding the regime applicable to cloud services, when they concern audiovisual content, hinder the development of new services
can user record an store private copy in the cloud?

Is AVMS discouraging the dematerialization of services?

are we generating a paradox and putting streaming services at disadvantage versus the sale/rent of DVDs?

Non linear offers → is AVMS discouraging dematerialization?



The screenshot shows the MediaWorld website interface. At the top, the logo 'MediaWorld COMPRA ON-LINE' is on the left, and a red banner on the right says 'download film e streaming film scarica e guarda oltre 1.200 titoli compatibili Mac e Windows!'. Below the logo is a navigation menu with links: Home, Guida rapida, Supporto clienti, Compatibilità, Dillo a un amico, Contattaci, Collega PC-TV, and I MIEI ORDINI. A category filter bar includes: AZIONE/AVVENTURA, CARTOON, COMEDIA, DRAMMATICO, EROTICO, FANTASCIENZA, GIALLO/THRILLER, HORROR, CORSI/DOCUMENTARI, DRM Free, and Disney. A search bar contains the text 'RICERCA: [input field] VAI Ricerca per argomento'. The main content area features a video player for 'IL DOMANI CHE VERRA' - THE TOMORROW SERIES. The player shows a woman holding a pink sign. To the left of the player are buttons for 'SCARICA DOWNLOAD € 9,90', 'GUARDA STREAMING € 2,90', 'TRAMA', and 'SCHEDA'. Below the player is a navigation bar with buttons: NOVITA', ULTIMI ARRIVI, TOP TEN, OFFERTE, PROSSIMAMENTE, TUTTI I FILM, and STREAMING WARNER BROS. At the bottom, there is a row of movie posters: 'IL DOMANI CHE VERRA', 'C'ERA UNA VOLTA', 'SECONDO JUSTICE', 'L'INTERNO VERDE', 'MA COME FA A FAR TUTTO?', 'APCALYPTO', and 'Il Mio Sogno di un Gatto'. On the right, a large green promotional banner reads 'SOLO PER 3 GIORNI! SCARICA 10 TITOLI NOVITÀ A € 5,00, cad. SCONTO 57% Promozione valida dal 30 aprile al 02 maggio 2012'.