



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

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- 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

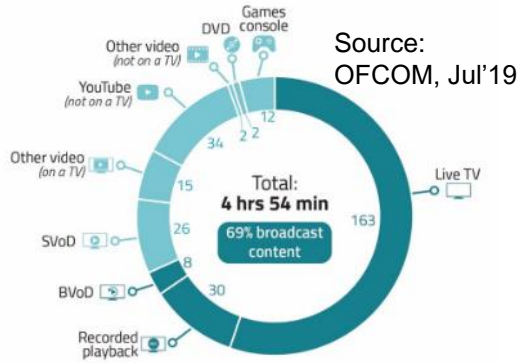
The first Alexa voice controlled set-top-box in the UK on EE TV

Netgem 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



BBC licence fee paid by 250,000 fewer people

Matthew Mean, Media Correspondent
Tuesday September 15 2020, 5:05pm
The Times



Use of iPlayer has risen but some are content to limit their viewing to conventional services such as Netflix

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

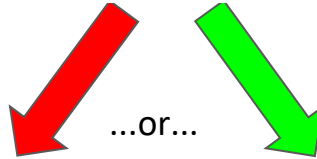
The way we watch...how TV habits are changing

A THIRD of TV viewers now watch their favourite shows online, a study reveals.
Many of us are switching from traditional "pay TV" deals to streaming platforms on the web, it was found.
One in five people who has subscription TV deals also stream extra content, and platforms such as Netflix and YouTube are now as common as Sky, BT and Virgin Media packages.
The poll of 2,000 adults found that viewing habits have changed markedly in recent years, with a third of all television watched being streamed online.
The research also found that many viewers typically have access to a

By Cyril Dixon
staggering 215 channels, yet watch only 12 on average.
Some 31 per cent of respondents over the age of 55 said they tune in to just five different channels.
And it appears that despite being in the age of remote controls and multiple TV menu screens – some as big as a car – viewers are still reluctant to check what's on the old-fashioned way.
Some 41 per cent of people aged 55 and over still prefer to use a printed TV guide to find out what to watch.
The study by Optimum Research for online television service netgem.tv

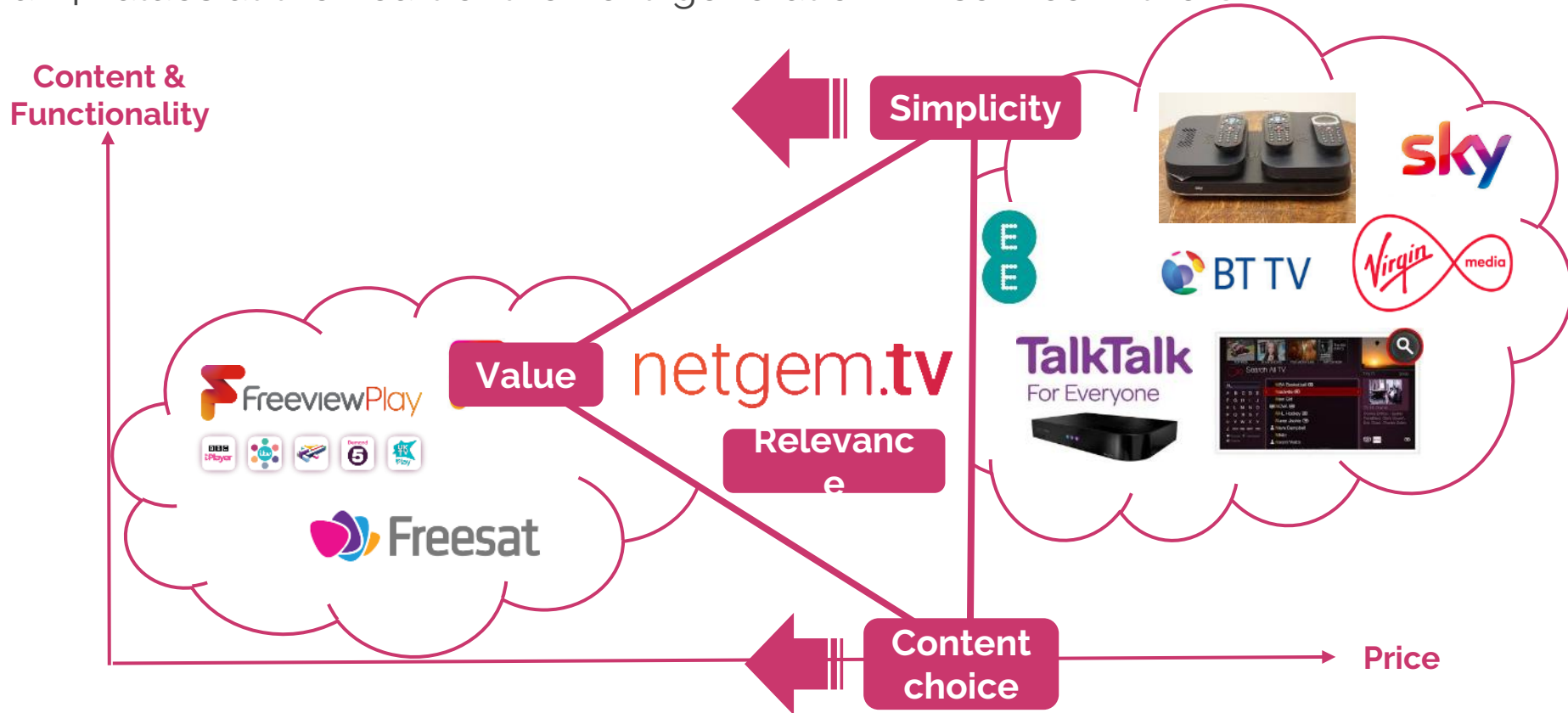
highlighted the rise of online streaming.
Sylvain Thevenet, netgem.tv managing director, said: "The findings show the extent to which the dominance of the traditional pay TV provider has been disrupted by cheaper pick and play online services.
"The advent of free or affordable streaming services poses the question, why would anyone pay for expensive TV bundles which cater to one taste?"
"Perhaps people used to make sure of the TV channels they were buying."
"But now our evidence shows that most people only watch a fraction

available to them – and therefore are paying for channels they are not using.
"People are paying too much for TV which doesn't cater to their taste."
"The way we will see a day at the future when we turn around and say: "Can you remember when we paid £70 a month just to watch TV?"
"With digital, on-demand offerings it's now possible for every member of the family to enjoy TV personalised to their taste."
"And that is at a time, which suits them, on any device, and not having to pay for channels you don't want."
"The days of channel hopping are well and truly over."



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...



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) across 4K OTT + DTT

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)



"Best interactive TV application"



Only £10 per month, with Freeview Play catch-up and pay-as-you-go options

				
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?

Value



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.

Content
choice



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.

Simplicity



3

True 'myTV' (relevant personalisation)

Personal recommendations, watchlist, recordings, regional selection (top 10 in ...).

Relevanc
e

Our 'Super-aggregator' service in the UK

Bringing the best content together!



1

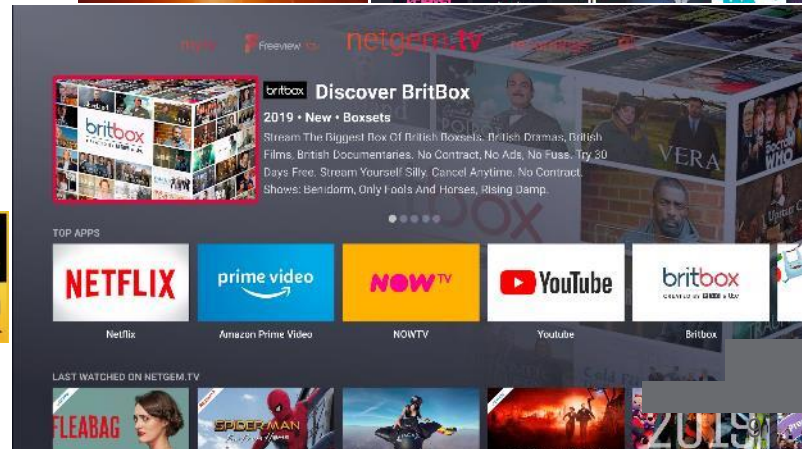
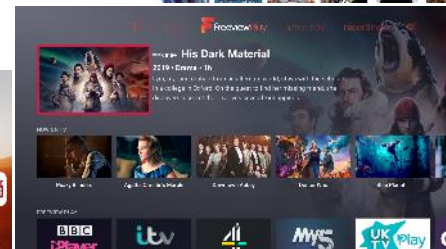
All Freeview channels (HD)
+ All the Catch-up from the UK Broadcasters
+ OTT IP channels
+ the top OTT players in 4K UHD
...always up-to-date!

- ✓ 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**



Content
choice

Value



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'

Simplicity



- ✓ 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



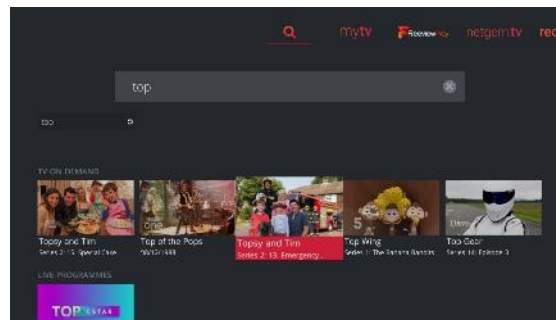
Our awarded UX



Works with Alexa & Google Voice

Universal search

Find & Cast from mobile



Our 'Super-aggregator' service in the UK

Truly 'myTV' (relevant personalisation)



3

'myTV' brings relevant content to the TV viewer & **notifications** drives engagement.

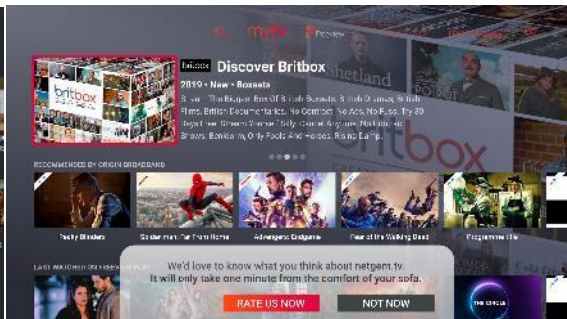
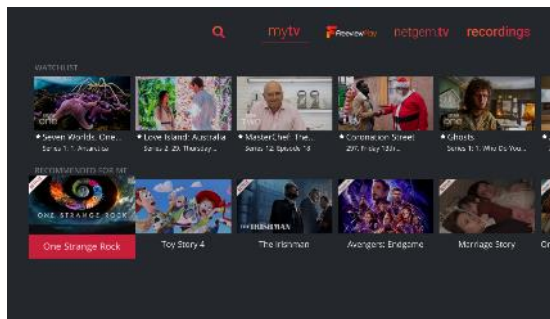
Relevance

- ✓ 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



myTV

Recommendations



Notifications

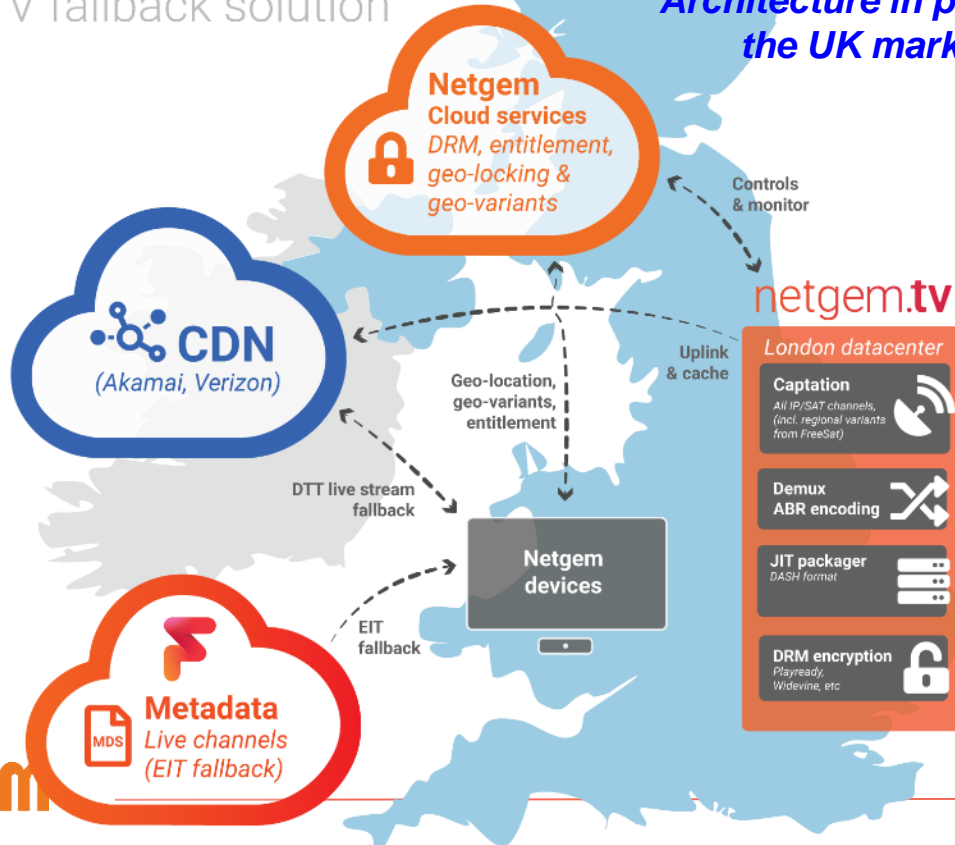
Customisation / Editorialisation



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 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 HbbTV**
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

Our market: all Fibre Altnets + TalkTalk = 25% UK households!

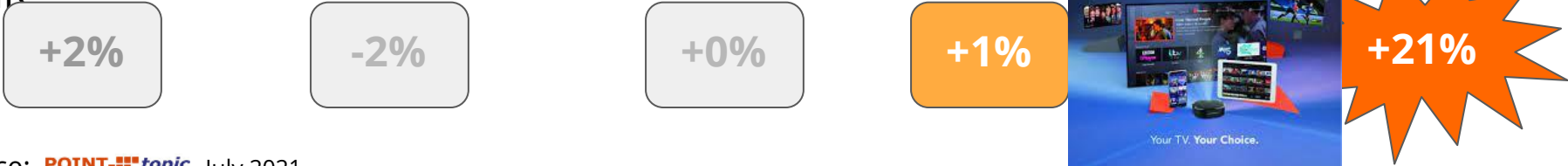
TalkTalk TV 4K announced to launch for Xmas'21 with NetgemTV

15 Fibre ISPs with Netgem TV (...and more to come on board!)

Broadband Households in the UK:



CAGR



Source: **POINT** topic July 2021

AltNet Full Fibre ISPs Target 29.9 Million UK Premises by 2025

Tuesday, June 8th, 2021 (10:41 am) - Score 2,424

Email | Link News



7M = 25% UK households

15 Alternative Fibre ISPs have already launched with Netgem TV in UK & Ireland:

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Origin.

Oct'20

Netgem and Origin Broadband partner to launch Origin TV

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

Community Fibre

Dec'20

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Netgem launches low cost multiscreen service

purebroadband

Sep'20

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Enjoy a night in!

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

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Broadband ISP TalkTalk UK Sign Netgem Deal to Launch 4K TV Service

Tuesday, October 12th, 2021 (5:48 am) | Score 5,068

Email | Link News | 15 Comments



Netgem TV

Your TV. Your Choice.

Budget UK broadband ISP Talk Talk has today officially signed a contract with pay TV solutions provider Netgem, which will see the provider launch a new "TV 4K" product for their 4.2 million customers that will be powered by the Netgem TV platform and an apparently "frictionless end to end" operating model.

The decision, which was first hinted at late last month (here), marks a significant step away from the provider's long-running use of the YouView (IPTV) platform (something they originally helped to develop alongside

YOU CAN'T TRUMP THIS | **MAKE TV GREAT AGAIN**

NEW 4K TV BOX | 135+ channels | ONLY £15.99

OriginTV | **JT**

Nov'20

wightfibre Because we care

Taking you to the action this December.

Watch Premier League football live on Prime Video this December with WightFibre and netgem.tv

Internet TV

POP telecom

Gigaclear Ultrafast Fibre Broadband

From £17.49 a month

TalkTalk For Everyone

Oct'21

BT and the BBC etc.). Such a move wasn't entirely unexpected, as the ISP has recently been rolling back their interest in existing Pay TV products (here).

Netgem TV's box and service have already been widely adopted by a growing number of UK ISPs, particularly smaller alternative networks that lack the funding to develop their own bespoke platforms. The set-top-boxes that they provide – **Netbox HD** and **Netbox 4K** – tend to be similar to some of those supplied by rival video streaming companies, including the usual array of premium content (sports), apps (Amazon, BT Sport, hayu, Rakuten TV, YouTube etc.), live TV channels (Freeview) and catch-up content



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!



*"Best user experience for
Video Streaming service"*

VideoTech
INNOVATION
AWARDS 2019

*"Most advanced TV
service"*



*"Best interactive TV
application"*

