



HBBTV & OPERATORS: WHAT'S NEXT?

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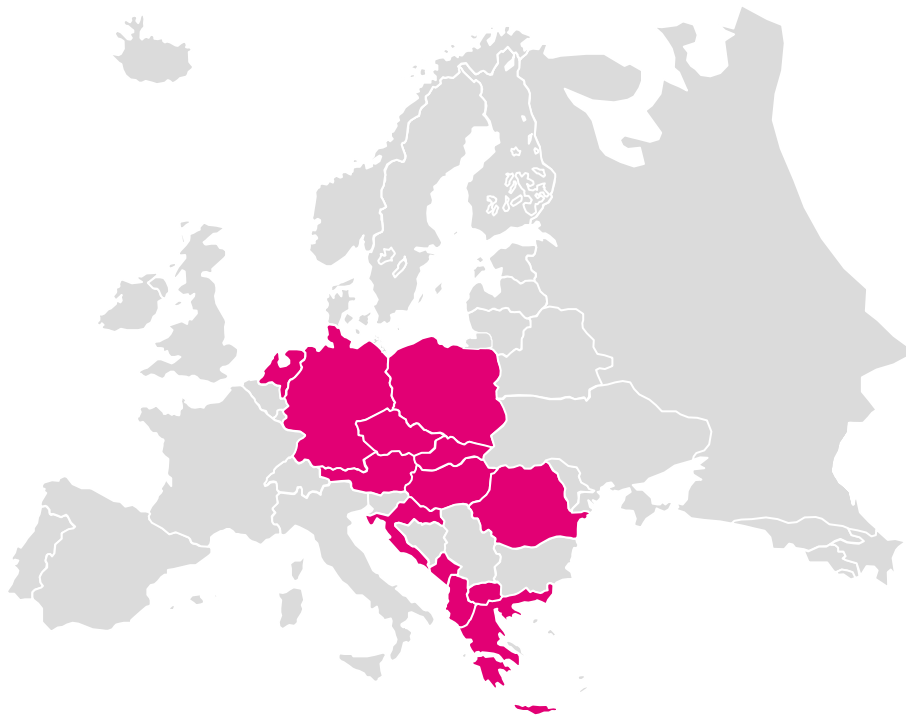
LIFE IS FOR SHARING.



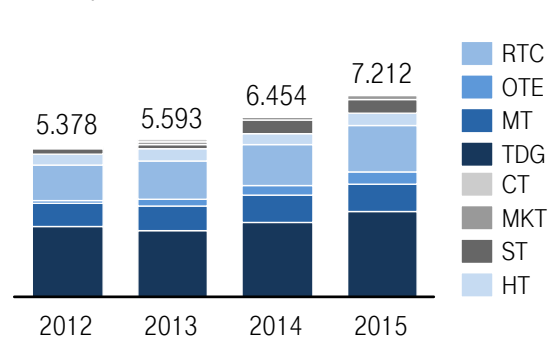
AGENDA

- 01** 2016+ Challenges
- 02** HbbTV in Deutsche Telekom – an Update
- 03** HbbTV Operator Apps
- 04** Mobile First – Opportunity or threat for HbbTV
- 05** W3C & HbbTV

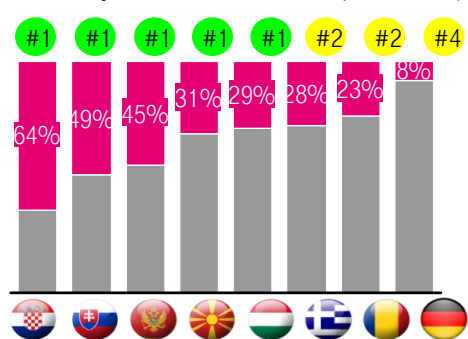
2016+ CHALLENGES



DT's PayTV Subscriber development (2014 in mn)*



DT's PayTV market shares & positions (2014)*



* Pay-TV subs cover customer paying for receiving encrypted TV service (recurring)

- How to grow in in classical fixed line IPTV/Hybrid TV markets?
- How to grow in countries with a mobile only footprint?
- What is the future of the STB & how to approach the OTT business?
- HbbTV & HbbTV Operator Apps as chance to grow throughout partnering and cost reduction

The HbbTV logo is displayed in white text against a dark, textured background. The letters 'H', 'b', and 'b' have two small white dots above them, representing eyes or signal indicators.The W3C logo is shown in white text. The '3' is stylized with a circular element on its right side.The Deutsche Telekom logo, a stylized 'T' with three dots to its right, is rendered in white.

HBBTV IN DEUTSCHE TELEKOM - AN UPDATE

- Deutsche Telekom's HbbTV strategy is **still under development**
- It became clear that there is **no business case for just enabling red button applications** from the broadcasters on own STBs
- W3C's HTML5 specification as a first class citizen for all new deployments
- HbbTV is much more considered as a potential option for Deutsche Telekom's upcoming new platform rollouts to allow:
 - the cost effective and easy **integration of broadcaster apps** and the apps of other partners
 - To **reduce the cost for the integration third party devices Operator Apps on Connected TVs**
 - To **streamline own portal developments**
 - To **re-think second screen** (HbbTV Cast?)

HBBTV OPERATOR APPS



- Deutsche Telekom is fully supporting HbbTV's new „big ticket“ called Operator Apps
- Simplicity is a must for this initiative
- Focus must lie on standardizing the core aspect only and core business need: **Enable IP & Hybrid TV delivery for operators.**
- Avoid starting from scratch: Re-use OIPF STB-less spec
 - Bootstrap
 - Multi app handling & interaction
- Interact with W3C



MOBILE FIRST – A THREAT FOR HBBTV?

- Latest figures¹ show that OTT streaming devices gain more and more momentum
- Furthermore “mobile first” usage scenarios start to dominate content consumption scenarios
- Operators around the globe have understood and define products representing either a mixture of OTT and managed TV or launch TV products also in mobile only countries
- **Can HbbTV take over a leading role in providing an open cast framework?**

¹ <http://www.broadbandtvnews.com/2015/11/29/chromecast-leads-streaming-devices-market/>



MOBILE FIRST – A THREAT FOR HBBTV?

- HbbTV has to reflect these developments in pushing the HbbTV Second Screen Framework more ahead
- Acceptance of OTT technologies by (IPTV-)operators
→ Challenge multicast
- Drive Cloud-based use-cases in HbbTV
→ Especially Cloud PVR/reverse EPG
- Broadcasters should expect the coming end of linear advertisement.



TEAMWORK

HbbTV

W3C

MAKES THE DREAM WORK

W3C AND HBBTV

- HbbTV relies mostly on Web standards, originating from W3C
- W3C is setting the pace for all screens

- Deutsche Telekom recommends to align work on all Web related aspects directly with W3C's Web & TV IG
 - HTML5 Encrypted Media Extensions (EME) and Media Source Extensions (MSE)
 - TV Control API
 - Work on Conditional Access
 - Work on Second Screen

Image source: <http://bit.ly/1lltSF>



KEY TAKE AWAYS

- The success of “HbbTV” Operator Apps” is highly dependent on a clear focus on the core aspects and business needs of operators and device manufacturers during specification work only
- Deutsche Telekom will push “HbbTV Operator Apps” with help of a parallel go-to-market activity with partners from the Telco- and device manufacturer business.
- Complementary trials in 2016 will establish a W3C-like working mode based on „reference implementations“

CONTACTS



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