



## Now Playing

Playlists  
Artists  
Albums  
Songs  
Podcasts  
Genres  
Composers  
Jukebox  
Videos

browse

 shortcuts



Song:  
Only a Frame of Mind

Artist:  
The Playbacks

# Hybrid TV and Over the Top TV Status Report



## Overview

Hybrid TV is the use of a broadcast and IP connection for the delivery of a TV service. Hybrid TV is not new; in 2008 the majority of IPTV STBs (Set Top Box) shipping in Europe had digital terrestrial TV (DTT) tuners in addition to an IP connection. However, for many the shift to hybrid TV has been a quiet revolution. Especially given two of the telco industry's most successful TV deployments, Verizon FiOS (2.9M customers in Q4 2009) and Orange TV (2.1M customers in 2009), are both hybrid TV. The whole of the payTV industry is now taking notice of what this means.

This report brings together work performed on hybrid TV over the passed year through over 200 operator and supplier interviews and online questionnaires, gathering information on deployment experiences, market requirements, competitive landscape, and technology trends.

## Report Structure:

This 114 page report including 57 figures examines the current status of hybrid TV and Over The Top (OTT) TV with the following sections:

- Introduction: providing definitions and a brief global round up of hybrid TV activities including standardization.
- Understanding the TV ecosystem: an important section for all readers from the telco industry. Neither IPTV nor hybrid TV can be treated as an isolated industry; they're the delivery pipes for the much larger, complex and well established TV industry.
- Deployments and learning: reviewing hybrid TV deployments and the lessons learnt.
- Drivers for and business case of hybrid TV: based on market research in understanding why operators are moving to hybrid TV.
- Interactive services and STB (Set Top Box) applications: understanding an important category of services enabled by hybrid TV.
- OTT market status: examining this complex and rapidly changing Internet TV market.
- Hybrid TV suppliers: reviewing both solution providers and STB suppliers.
- Operator rankings and requirements: based on market research of operators' perceptions of suppliers and their requirements for hybrid TV solutions.
- Future of hybrid TV and recommendations for members of the ecosystem.

## Target Audience

- PayTV operators (telcos, cable operators, satellite TV, and terrestrial TV) providing insight into the factors behind hybrid TV's success, and recommendations in retaining value in the evolution of the TV industry
- PayTV and telco equipment providers: understanding the emerging hybrid TV opportunity and operators' requirements
- STB application developers: helping understand where to focus in building STB applications
- Investors: where the investment opportunities reside in the emerging hybrid TV landscape

## Key Report Findings

- The Telco TV (IPTV) market, though growing, remains less than 10% of the total payTV market through to 2013. However, as cable, terrestrial and satellite providers examine interactive TV options, they will likely go hybrid.
- The payTV market is predicted to reach 575M subscribers in 2012, compared to telco IPTV of 45M subs, so the addressable market for hybrid TV is potentially vast, hence why it needs to be on the agenda of all telco / TV suppliers.
- Currently HbbTV has the industry's attention, which is CE-HTML based. Its supporters claim DVB MHP/GEM had its chance; technology and customers' expectations have moved on. Operators appear more circumspect, given the operational headaches in deploying the latest technology. We're likely to see the CE (Consumer Electronics) manufacturer's take the lead, if it works reliably at scale, and customers enjoy the experience operators will likely follow.
- PayTV providers' strength today comes from their network, the hours customers spend watching TV over their networks, and an established and sophisticated business model. So the skill comes in ensuring they remain the content owner's best path to cash from the customer. Hence ensuring continued high levels of consumption and leveraging their networks is required.

# Table of Contents

## FORWARD

### Executive Summary

### Brief Hybrid TV Geographic Market review

#### EMEA

#### Americas

#### Asia Pacific

### Key Learning From Hybrid TV Deployments

### Telco Challenges in the TV Ecosystem

### Impact of Technology across the TV Ecosystem

### Future Scenarios

### OTT and Internet TV

### Recommendations For PayTV Providers

### Recommendations For IPTV / Hybrid TV Suppliers

### Recommendation for STB Application Developers

### Recommendations for Investors

### Introduction and Background

### Introduction

### DefinitionS

### Why Hybrid TV is Exciting from a Supplier's Perspective

### Hybrid TV Standardization Activities

### The Hybrid STB

### Brief Hybrid TV Geographic Market review

#### EMEA

#### Americas

#### Asia Pacific

### Understanding the TV Ecosystem

### Producers / Distributors and Studios

### Broadcasters

### Cable Networks

### Advertisers

### Canoe Ventures

### Advertisers and the Network PVR

### PayTV Providers

### Deal Structures

### Imperfect Competition and the Battle between Networks and PayTV

### Telco Challenges

### Impact of Technology across the Ecosystem

### Future Scenarios

### Hybrid TV and OTT TV Deployments: Telco / Satellite / Cable

### AT&T HomeZone

### Verizon FiOS

### BT Vision

### Orange TV

### Canal+ Le Cube

### Detsche Telekom T-Entertain

### Telecom Portugal Meo

### Telefonica O2 Czech Republic O2TV

### HanseNet AliceTV (Now Telefonica O2)

### FastWeb, Telecom Italia, JazzTel and Telefonica

### ComHem

### Telecom New Zealand and TiVO

### Telecom Italia OTT TV CuboVision

### Learning from Hybrid TV Deployments

### Hybrid TV and OTT TV Business Models

### Drivers for HybridTV

### Broadcaster Partnership? Business Model

### Operator Hybrid TV Survey

### Interactive Services and STB Applications / Widgets

### EBIF and Tru2way

### EBIF

### Tru2way

### DVB-MHP (Multimedia Home Platform) and GEM

### WTVML

### CE-HTML

### Other STB APIs

### Verizon Case Study

### Sky UK Case Study

### Interactive Service and Application / Widget Roadmap

### Over The Top Providers

### Over The Top TV Op-

### tions

### Traditional TV goes online

### Comparing UK OTT providers

### BBC iPlayer

### Sky Player

### ITV Player

### 4oD (Channel 4 on Demand)

### Demand Five

### Project Canvas

### Consumer Electronics Manufacturers

### Sharp

### Toshiba

### Panasonic

### LG

### Windows Media Extender

### Philips Electronics

### Samsung

### Sony

### Internet TV and bringing it back to the TV

### Miniweb

### Boxee

### TiVo

### Walmart / VuDu

### Mapping the Landscape

### Social Networks and TV

### Social TV

### Online TV Networks

### Hulu

### Also RaNs

### Conclusions

### Hybrid TV Vendor Analysis

### Mapping out the Solution Landscape

### Solution Providers (Alphabetical Listing)

### Alactel Lucent

### Cisco

### Ericsson

### Espial

### Huawei

### Kudelski Group: Hybrid TV Solution Thought Leadership

### Motorola

### NSN

### Technicolor (Previously known as Thomson SA)

### UT Starcom

### ZTE

### STB Vendors

### Operator Survey Ranking of Hybrid STB Suppliers

### STB Supplier Review (Alphabetical Order)

### ADB - Advanced Digital Broadcast

### Amino Communications Ltd

### Cisco / Scientific Atlanta

### Dasan

### Entone

### Huawei

### Motorola

### Netgem

### Pace

### Pirelli

### Move Networks (Inuk)

### Sigma Designs

### Technicolor (previously known as Thomson SA)

### Yuxing

### Operator Rankings and Requirements

### Hybrid TV Ranking based on operator SURvey

### Example Operator Hybrid TV Requirements

### Future of Hybrid TV & Recommendations

### Market Forecasts

### Service Roadmaps

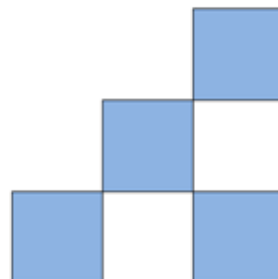
### Recommendations

### Recommendations For PayTV Providers

### Recommendations For IPTV / Hybrid TV Suppliers

### Recommendation for STB Application Developers

### Recommendations for Investors



## Table of Figures

Figure 1. STB Breakdown by Revenue.

Figure 2. Example Hybrid TV Deployments: Europe.

Figure 3. Rating Technology Impact on TV Ecosystem Members.

Figure 4. Review of Future Scenarios, based on industry interviews.

Figure 5. Battle Across the TV Landscape.

Figure 6. Mapping the Hybrid TV Landscape.

Figure 7. Total Pay TV Market Size (also includes Free Sat and Free Cable)

Figure 8. Split between Pure and Hybrid TV Subscribers.

Figure 9. STB Breakdown by Revenue.

Figure 10. Example Hybrid STBs (Picture sources: ADB, Amino, Pace, Pirelli, Motorola, Netbox, Thomson, Yuxing, Sagem, Entone, Telsey)

Figure 11. Example Hybrid TV Deployments: Europe.

Figure 12. TV Ecosystem..

Figure 13. Change in Ad Spending in US (source Nielsen)

Figure 14. Advertising Value Chain.

Figure 15. Trend in PayTV Subscription and Advertising Revenues.

Figure 16. Global Growth in PayTV..

Figure 17. Examples of Deal Structures in the Value Chain.

Figure 18. Rating Technology Impact on TV Ecosystem Members.

Figure 19. Review of Future Scenarios, based on industry interviews.

Figure 20. Verizon FiOS Architecture and Migration Plan (source Verizon)

Figure 21. Verizon FiOS Customer Numbers (source Verizon)

Figure 22. How OrangeTV Delivers on Service Ubiquity (source Orange)

Figure 23. Simplifying the Purchase decision - Regardless the customer will get OrangeTV (source Orange)

Figure 24. Orange TV Subscribers (source France Telecom)

Figure 25. CanalSat Proposition (source CanalSat)

Figure 26. What are your drivers for Hybrid TV?.

Figure 27. What are the Barriers to hybrid TV?.

Figure 28. Applicability of Hybrid TV..

Figure 29. Simplified EBIF Architecture.

Figure 30. Verizon's STB interactive Technologies.

Figure 31. Verizon Architecture.

Figure 32. Verizon Widget Bazaar and Twitter Widget (source Verizon)

Figure 33. Example of WTVML Page.

Figure 34. SkyNet Overview..

Figure 35. Plurality of OTT Options.

Figure 36. Trends in the Evolution of TV..

Figure 37. TV Landscape.

Figure 38. BBC iPlayer Demographics (source BBC)

Figure 39. Internet TV's short History.

Figure 40. Mapping the InternetTV on the TV Landscape.

Figure 41. TNO Field Trial (Source TNO)

Figure 42. TNO Results (source TNO)

Figure 43. Commercial Opportunities Enabled by Social TV (Source TNO)

Figure 44. Battle Across the TV Landscape.

Figure 45. IPTV Solution Landscape.

Figure 46. Ericsson's TV Markets (source Ericsson)

Figure 47. Ericsson TV Ecosystem (source Ericsson)

Figure 48. List of Sample Espial Customers.

Figure 49. Espial's Product Portfolio.

Figure 50. End-Point Security Across hybrid TV (source Kudelski Group)

Figure 51. Motorola IPTV Solution (Source Motorola)

Figure 52. Technicolor SmartVision hybrid TV Solution (Source Technicolor)

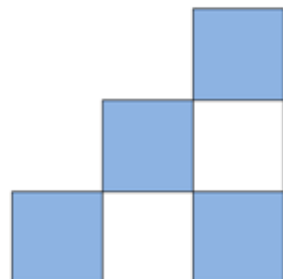
Figure 53. Please rate these vendors on Hybrid TV Capability.

Figure 54. Operator Ranking of hybrid TV Solutions.

Figure 55. Hybrid TV Solution Architecture.

Figure 56. Market Estimate of TV Subscriber Growth between pure-play and Hybrid Subscribers.

Figure 57. Data Table for TV Subscriber Growth.





# Order Form

Report Title

**Hybrid TV and Over the Top (OTT) TV Status Report**

License Type

- Single User License ..... **\$ 1,995 USD**
- Team License (2-5 people) ..... **\$ 3,665 USD**
- Company-wide License..... **\$ 6,995 USD**
- Other Licensing options available: Contact Mind Commerce

Family/Surname

First Name

Position

Company

Address

Country

Post Code

FAX

Telephone

Email

Order Type

- 
- Order by FAX at 1 877 646 3266

Card Number

Expiration Date (MM/YY)

CV Code

Cardholder's name

Signature

Billing Address

Postcode

Country

Signature

Date

### Online Ordering

Customers can order online by visiting report web page:  
[http://www.mindcommerce.com/Publications/HybridTV\\_OTT.php](http://www.mindcommerce.com/Publications/HybridTV_OTT.php)

Tel/FAX: 1-877-MINDCOM (646-3266)

Email: [info@mindcommerce.com](mailto:info@mindcommerce.com)

[www.mindcommerce.com](http://www.mindcommerce.com)