



T-ONLINE Triple Play offer

Zoom on IPTV service

Denis Vergnaud, Consultant

Mediatvcom – Experts in Media and Telecommunications

dvergnaud@mediatvcom.com

Nicolas Bry, Head of Product & Services division

T-ONLINE France

TV and VOD market in France



- **Pay TV, a mature market**

- Penetration rate stable at 35% (9 millions, 4 m cable / 5 m sat), low growth on TV & Cable (+100 000 users), no ARPU increase → **IPTV is major growth relay**
- Consolidation is on going : 2004 : cable sector, 2006 : Merge of TPS and Canal

- **DTT**

- **Rapid uptake** based on 18 free channels offer: **2.5M** households, over 58% geographic coverage
- **Paves the way for pay TV (starting with 11 pay channels)**

- **VOD, Market is emerging but potential is high**

- Orange, Free and T-Online have just launched their service
- Deals with majors are progressing (Warner..)
- 80% of Internet users rent more than 3.7 DVD per month (12€/month)

French ISPs aggressive move



- **ISP competition is increasing :**
 - Over 1 million IPTV users and 400k pay-TV subscribers
 - Massive media and CapEx investments from Orange and Free
 - Generalization of TP offers (Orange, Free, Alice, N9uf, T-Online)
 - ISP competitive advantage becomes visible on VOD, DVR (set-box hard drive) & content portability to media player devices
- **Battle on TV & Convergence services has started :**
 - Repositioning of Cable operators on Triple Play
 - Mobile operators and electronics goods retailers (Darty) planning to deliver ADSL access
 - Content aggregators (Canal+, TF1) resisting ISP move: exclusivity deals on VOD, cherry pick more difficult

**T-Online proposes a complete Triple Play
for a very competitive rate of €29,9**

clubinternet³
Microsoft TV


clubinternet.



The advertisement features a pink background with the Clubinternet 3 logo at the top left and the Clubinternet logo at the top right. It lists three services: high-speed internet (up to 24 Mbps), unlimited fixed-line calls to 41 countries, and on-demand TV with the Microsoft TV system. The price is prominently displayed as 29,90€ per month. A small disclaimer at the bottom left states '*Offre soumise à conditions.'

clubinternet³


clubinternet.

@ HAUT DÉBIT jusqu'à 24 Méga

 TÉLÉPHONE ILLIMITÉ
vers les fixes de 41 pays

 TV À LA DEMANDE
avec système exclusif **Microsoft TV**

29,90€
/mois*

*Offre soumise à conditions.

- ADSL2+ access up to 24 Mbps
- Unlimited free calls for France and international (fixed lines over 40 countries)
- Extensive IPTV service
 - including over 130 TV channels, Time shifting, PVR and VOD based on exclusive Microsoft system

T-Online IPTV is next TV generation

clubinternet³
Microsoft TV



A unique combination of services and great customer experience

- TV
 - fast channel change over 130 broadcast TV channels (with TPS premium bouquet)
 - picture in picture and zapping banner, EPG for the next 14 days, time shifting
 - advanced functionalities such as search engine, parental control, multilingual
- PVR
 - integrated with EPG
 - recording through one touch button in the EPG
- VOD
 - 1000 assets catalogue (movies, music, children programming, documentaries, theatre trailers)
 - flexible tariffs: one shot purchase and subscription VOD



clubinternet.

Microsoft TV

TÉLÉVISION À LA DEMANDE

