TRIPLE PLAY: The role of the Vendor

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Everyone can offer Basic Triple play, but …

\[1 + 1 + 1 = 2.7^*\]

* User expects 10% discount
... true value is in convergent applications

1 + 1 + 1 = 7
The traditional approach: **Network Centric**

**Issue:** different vendors for each segment, Complex integration to be done by the telco
The New Approach: **User Centric**

- **Centered around products**
- **Centered around the user**

> “I couldn’t care less about networks, software or cables. I care about what really matters for me”
The three **C**s that matter for the user ...
Two ways to Heaven (preferably both)

Content Richness

- Interactive TV (PVR,..)
- Video on Demand
- Digital: 100s of channels
- Analogue: 50 channels TV
- SMS to TV

Personal Broadcaster

The ultimate end-user experience

Interaction

- Virtual Sofa
- Transactional TV
- In-Show Communication
- New Solutions Integrators
- Incumbent Video Vendors
- Incumbent Telco Vendors

Two ways to Heaven (preferably both)
Challenges for Vendors

- Overall Complexity
- Local Presence
- Consumer Understanding
- Special Skills
- Creativity
- Time to Market

Small vendors are typically good for trials only
Large Vendors need to team up with specialists
# How to fill the Skills Gap

## Consolidation

**Acquisition of specific skills**
- Video unknown to Telco
- Networking unknown to Software
- Communication unknown to video

**Examples**
- iMagicTV and thirdspace by Alcatel
- Myrio by Siemens

**Challenges**
- Time to multiply internally
- Cultural shock

## Alliances

**Deal with multiple partners**
- Security
- Head Ends
- Terminals

**Examples**
- Alcatel with Microsoft
- NDS, Nagra, Irdeto with various vendors

**Challenges**
- Stability and Complexity
- Shared Vision, One Voice to the customer
Who will win the “Race for the Future”

- … the ones who understand the user
- … the ones who can deal with multiple partners
- … the ones who are locally present
- … the ones who acquire the right skills
- … the ones with the best product
Conclusion

Triple Play is all about **the user**, not about technology

**Added value** comes from applications which cross borders

Integration of **complex platforms and networks** require one-stop shopping offer from large service integrators

Only vendors who can build up **skills and partnerships** will be successful