

How to Launch a Successful Video Service

True Detective

Episodes

1. S1E1. The Long

2. S1E2. Seeing Things

3. S1E3. The Locked Room

4. S1E4. Who Goes There

5. S1E5. The Secret Fate

6. S1E6. Haunted

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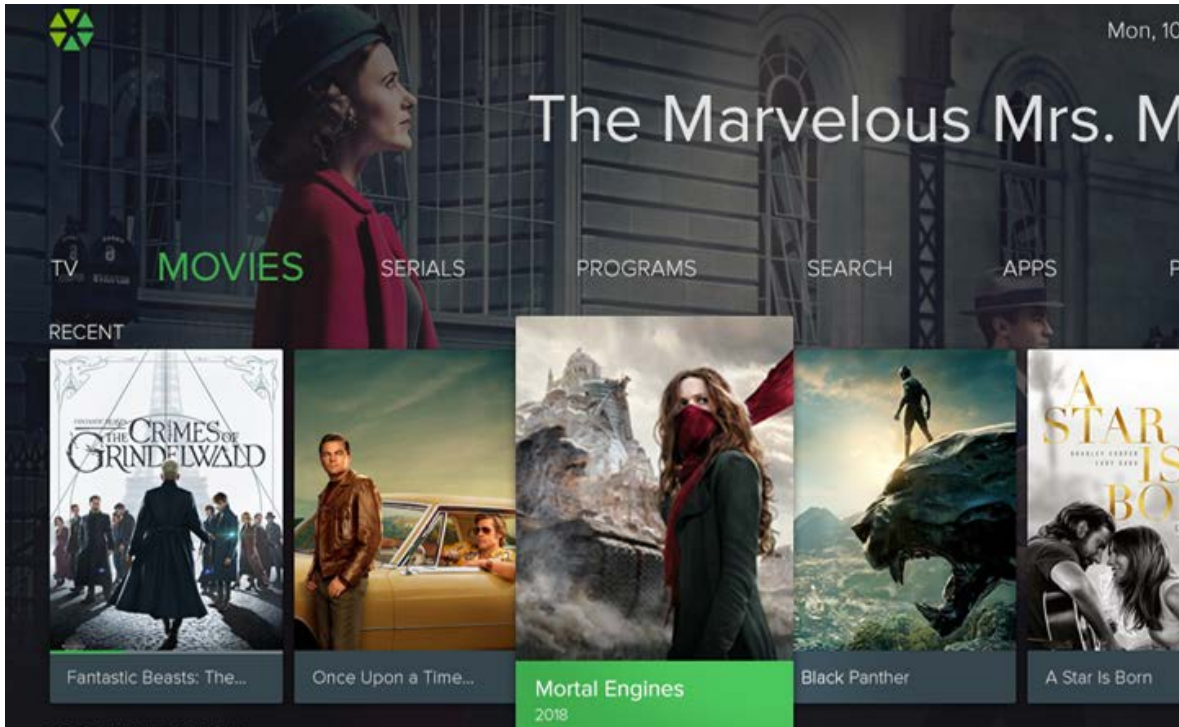
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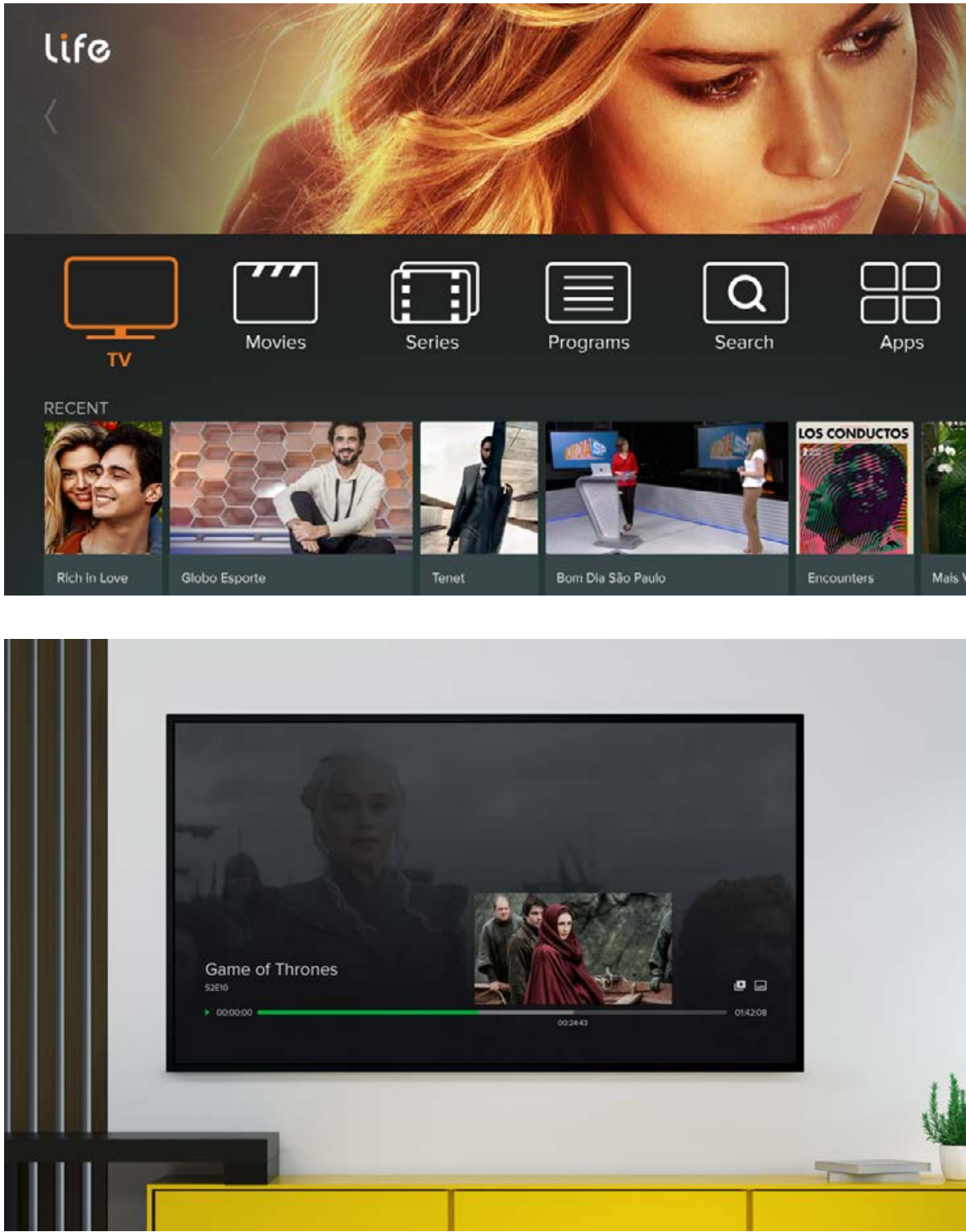
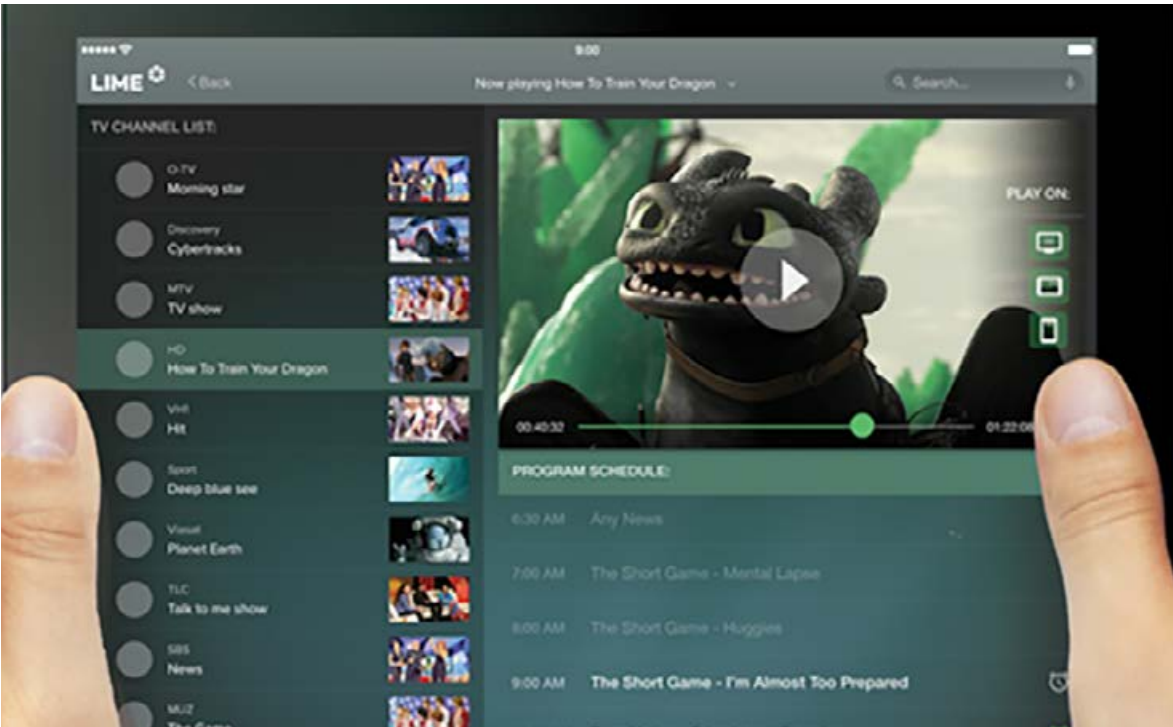


Introduction



How to Launch a Successful Video Service

When launching a TV service it is important to consider many factors, such as your technology, business models, market positioning, service provision and content strategy.



There is no “One-Size-Fits-All” approach, and to ensure success it is important to work with partners who have the expertise to guide you through the process. Smartlabs are excited about helping companies launch video services to deliver an upscaled user experience and drive audience growth and profitability. With years of experience they understand the intricacies and issues that may arise, so that they can be avoided and planned for. This guide will address the evolving TV landscape, along with key considerations and best practices for launching a video service.

Audiences are now watching more video content than ever before across a wider range of platforms. Global estimates for the number of TV enabled households remains stable at 82% but growth in new connectivity methods is opening up new distribution channels for TV delivery to consumers. More than half (55%) of the world’s TV households are believed to have broadband, 58% of the global population are likely to own a Smartphone and additionally 17% will have a tablet (Source: DigitalTV). It is expected that by 2023, there will be 5.3 billion internet users worldwide, with connected devices likely to be just under 4 per capita (Source: Cisco).

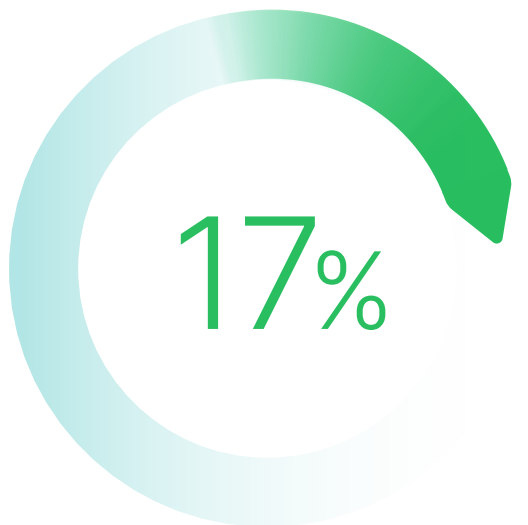
Consumer demands for television are changing. Growth in content consumption and technology uptake are leading to greater fragmentation in the industry. It is more important than ever to meet consumer expectations and future proof your video service in this evolving landscape.



TV Households believed to have broadband



of global population are likely to own a Smartphone



of global population likely to own a tablet

TV landscape and consumer trends



TV Landscape and Consumer Trends

Launching video services in the current television landscape comes with huge complexities. There are significant challenges determining what path to follow, with many more options today in terms of technology, business models, market positioning, service provision and content strategy.

Consumers are now engaging with video content on different terms. There is growing demand for access through multiple devices, different viewing methods (e.g. linear broadcast, on-demand, mobile downloads), types of service (traditional TV services and OTT) and even in the nature of the business model and contracting relationships for services (e.g. monthly subscriptions replacing longer commitments). Each of these factors need to be considered when launching a service and have implications for its design and the features and rights that need to be sought from content owners.

The explosion in the number of VOD services has impacted the dominance of traditional linear television. Netflix reported 204 million subscribers globally at the end of 2020, with Disney+ reaching 100 million after its first year of launch. Almost all US Studios have launched their own D2C services, utilising their content businesses and increasing their global footprint. At a local and regional level, there is increased activity with subscription services operating with a more tailored, market-specific content focus. The global streamers acknowledge this demand for local content themselves, investing in local productions to enhance their attractiveness to consumers. Pay TV Operators are increasingly integrating SVOD services into their ecosystem, to meet the audience demand for ease of access to these services, with it becoming an important addition to retain viewers within their own walled garden. Incorporating premium apps has its challenges, a key consideration being the operating platform you use, as this will have a fundamental impact on the offering and your core features.



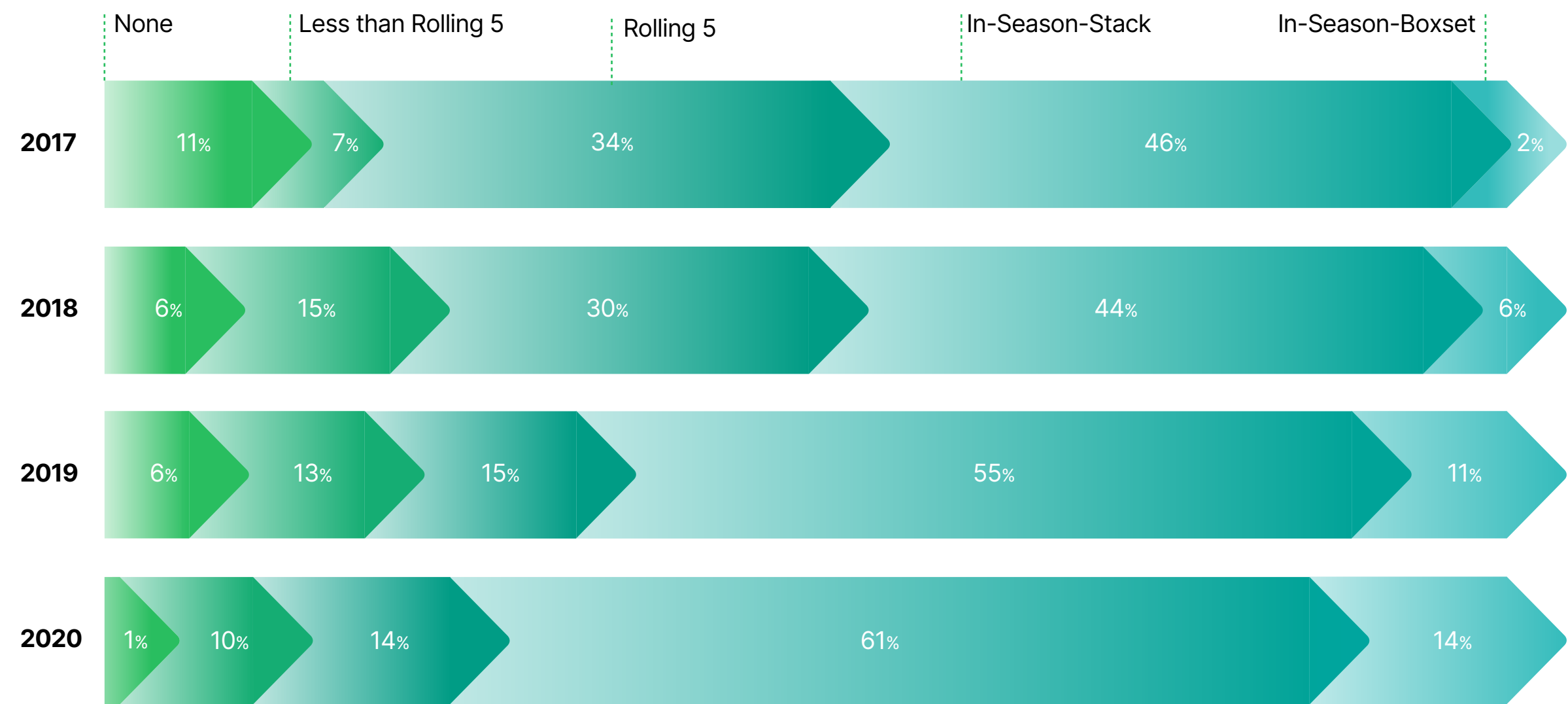
204m
Netflix subscribers

100m
Disney+ subscribers
after 1 year

As internet connectivity increases, the advertising market has shifted. Digital advertising is growing at a considerable rate and is likely to surpass traditional linear TV spend in the future. The digital ad market is proving a more attractive proposition with its possibilities for targeted advertising, an efficient use of marketing budgets. Faced with declining linear advertising revenue, broadcasters are evolving their propositions by expanding further into AVOD, with a number of initiatives to carve out a segment of this growing market for themselves. It is becoming more and more common for broadcasters to offer online exclusives and to release content in full as Boxsets (along with longer catch-up availability and access to their library) on their adjacent digital services.



New US Series Acquisition – Free & Pay TV Catch Up Utilisation (European Markets)



Live TV remains the most popular method for video viewing in all markets but the popularity of broadcaster digital services continues to rise, giving audiences more flexibility in consuming content at their convenience. Any new Pay TV service must consider the balance of linear broadcast channels with their accompanying apps.

There is more content than ever before and a greater variety of services providing it, ranging from broadcast channels and their OTT apps to SVOD and AVOD services. Pay TV operators are well positioned to bring the viewing experience together and to act as the hub for the majority of video viewing. Smartlabs solutions deliver content services to over seven million subscribers around the globe on multiple devices, from set-top boxes to mobile phones and Smart TVs. Their multi-screen, multi-network solution for the video streaming sector, can seamlessly integrate third-party premium and user-generated video services to deliver an enhanced user experience.

‘As internet connectivity increases, the advertising market has shifted. Digital is growing at a considerable rate and is likely to surpass traditional linear TV spend in the future.’



Operator Rationale



Crime, Drama, Mystery



True Detective is an anthology series in which police investigations
uncover the personal and professional secrets of those
involved, both within and outside the law.

True



Season 1



Season 2

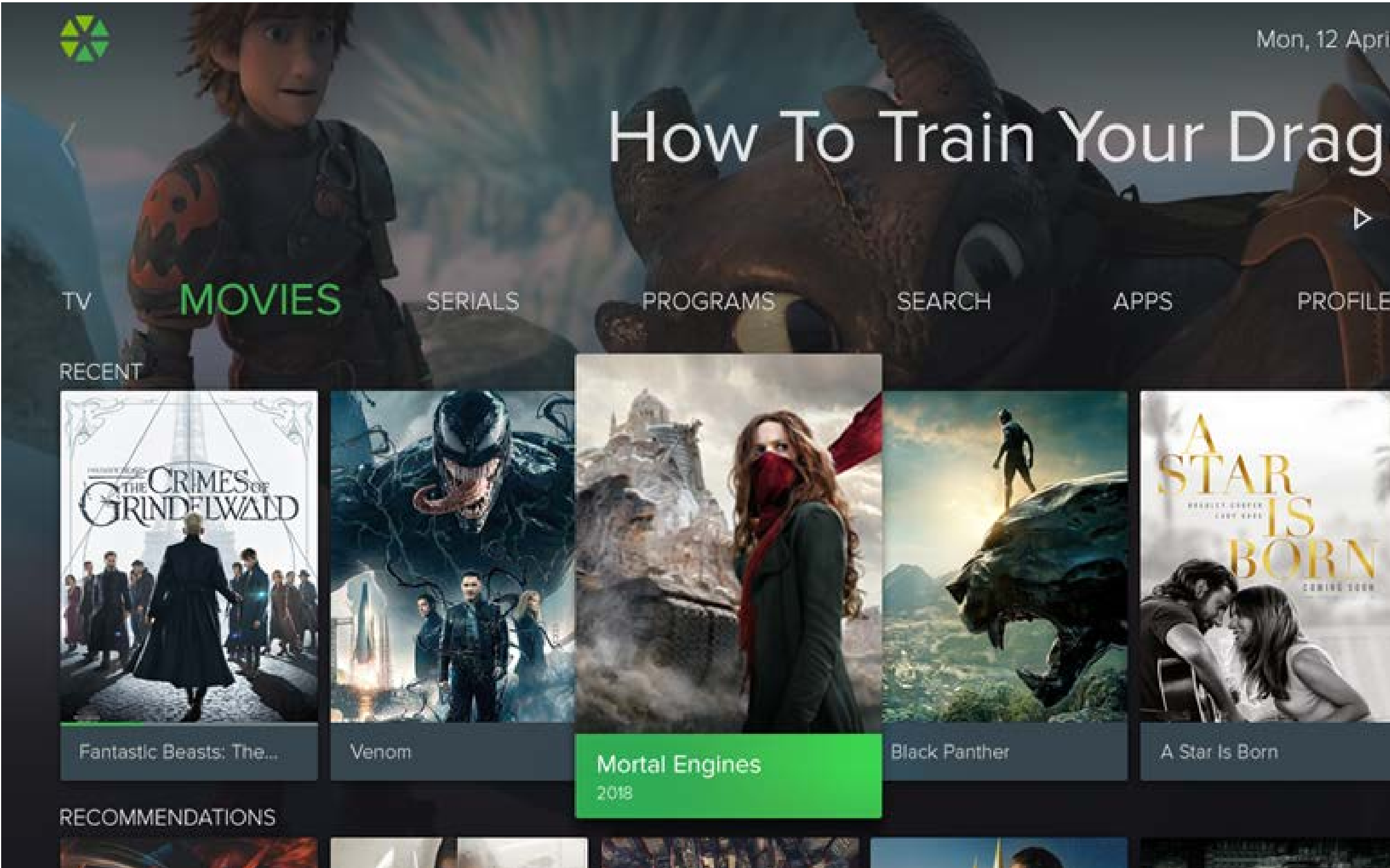


Operator Rationale

Operators face very different market conditions and priorities and will have clear objectives and rationale for launching video. These priorities and strategic focus, will map out the initiatives required for the video service.

There are multiple product elements (Fixed, Mobile and TV) that can at times be difficult to separate. However, video has a key role to play and with huge opportunity. TV may be one of the lower margin products but it plays an important role in bundle considerations.

For operators there are many drivers to launching video services. For example, potential gaps in the market for new services, a lack of innovation with existing TV platforms or a competitive set that doesn't address all segments. There may be opportunities to target a different section of the market in pricing terms, in particular as the pressure on full fat Pay TV solutions increases and the demand for more flexible choice driven packages grows. Supporting the bundled proposition continues to be a key point of focus for network operators. Adding video or new video tiers to bundles can help drive higher penetration of different services.



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Service Considerations and Features



Service Considerations and Features

The rationale for launching a video service will shape your objectives and ultimately determine your service considerations. Whether this means an extensive offer of traditional TV channels via Set-Top-Box (STB), a light weight mobile focused product or a hybrid solution.

The functionality associated with linear viewing has changed. Consumer expectations have shifted with the addition of recording capabilities, catch-up TV and reverse EPG to name a few. Smartlabs solution (SmartTube) caters to this consumer want by offering enhanced linear features such as network PVR, pushVOD and pause live TV. Similarly, consumer demand for HD and 4K is on the rise. Smartlabs STB is capable of delivering stunning 4K video with adaptive bitrate streaming and frame rates up to 60fps (frames per second).

It is difficult to imagine any TV service in the current market not launching or preparing for the integration of third-party Apps. The rate of launch by local services (both local broadcasters and new start-up SVOD services) means that operators need to be prepared for flexibility and to integrate them into their ecosystem. It is important to consider whether your service will offer VOD content directly acquired from studios (e.g. TV Box Sets and Movies), ad-funded (AVOD), transactional (TVOD) or subscription (SVOD) on demand services. These considerations will dictate the requirements of the technology platform and rights negotiations that will need to take place with potential content and service partners.

A modern multi-screen experience must consider users across four screens – connected TV, desktop/laptop computer, smartphone and tablet. Smartlabs hybrid solution provides advanced content delivery and multi-screen features to deliver an enhanced user experience. Their high-performance STBs deliver state-of-the-art interactive TV, direct to subscribers. LIFE, the Brazilian ISP, approached Smartlabs to utilise their STBs and launch their OTT platform nationwide. Smartlabs provided a scalable, flexible and proven solution to match their business growth. This solution also included some security functions to help maintain broadcasting rights such as geo-filtering, watermark messaging and anti-piracy measures, all of which contributed to a successful launch that will enable LIFE to grow exponentially.

Smartlabs recommends launching your TV service with the most feature-rich solution possible, enabling you to enter the market with a highly competitive and technically advanced product. Failure to do so will only dampen the customer experience and have implications for subscriber retention. It is better to launch a TV service with a product that aims to be the market leading solution but with a step-by-step approach to roll-out, than being reactive to the demands of your subscribers and adding requested features retrospectively. Smartlabs helped O2 Czech Republic to launch multi-dimensional television via a new UHD hybrid STB. This ground-breaking multiscreen solution, enables sports fans to view up to six games simultaneously in a multi-dimensional mosaic. Subscribers can view different camera angles in each match and select which commentary they listen to. This next generation interactive TV service ensures that O2 offer an unrivalled market leading customer experience.

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**Demand for
HD and 4K
is on the rise**

Technology Requirements



Technology Requirements

Choosing the right platform for your video service is key, as it will have a fundamental impact on the offering and core features of your product – which in turn will impact your subscriber growth and churn.

Some key considerations when deciding on a platform are the stability of the service, technical versatility/ functionality and content owner requirements to name a few. There are three main operating systems to build your video service: Android Open Source Project (AOSP), Android TV Operator Tier and Linux – each of these come with their own benefits and considerations.

Linux is frequently used for legacy hardware and is preferred by operators who want to retain greater control over their platform. Providers that select Linux, will have jurisdiction over their interface, branding, start-up routine, the ability to lock out competitors' content and to keep their viewer metrics private. However, it is worth noting that fewer third party apps are available and that premium SVOD apps are almost impossible to certify on Linux.

Android TV Operator Tier also provides the ability to include branding, customisations and modifications to the interface but a limited set of Google guidelines needs to be followed. The Google Play Store needs to be retained in a prominent position with its contents intact, including access to rival service operators. Android Operator Tier requires certification which even for some tier 1 operators is difficult. The alternative choice is their stock Google TV, which is a more basic-off-the-shelf product or to use Linux or AOSP.

AOSP offers access to the Android operating system without requiring the signing of any Google agreements. However, this means you will not have access to the Google Play store and so App management becomes the responsibility of the operator and App owner. Premium App providers such as Netflix, will not typically allow their applications to be included in an AOSP solution. A key benefit of AOSP is that you can have full control of UI design, branding and that third-party Android applications can be included – which enables wide subscriber choice.

Whichever operating software you decide to choose (Linux, Android TV and AOSP), it is important to consider your customer base and how comfortable you are providing what Google wants in return for satisfying those needs in a single STB. It is key to find a balance between them when deciding on the most appropriate platform.

There are other technical elements that you will need to consider, such as ensuring your devices are protected from piracy. As one of the industry's leading DRM services, Google's Widevine, is a popular choice for many operators. Smartlabs provides a test service and is an accredited partner of Google Widevine and can help support device manufacturers with testing and the integration procedure.

'Whichever operating software you decide to choose (Linux, Android TV and AOSP), it is important to consider your customer base and how comfortable you are providing what Google wants in return for satisfying those needs in a single STB.'

What are my options if I use STBs?

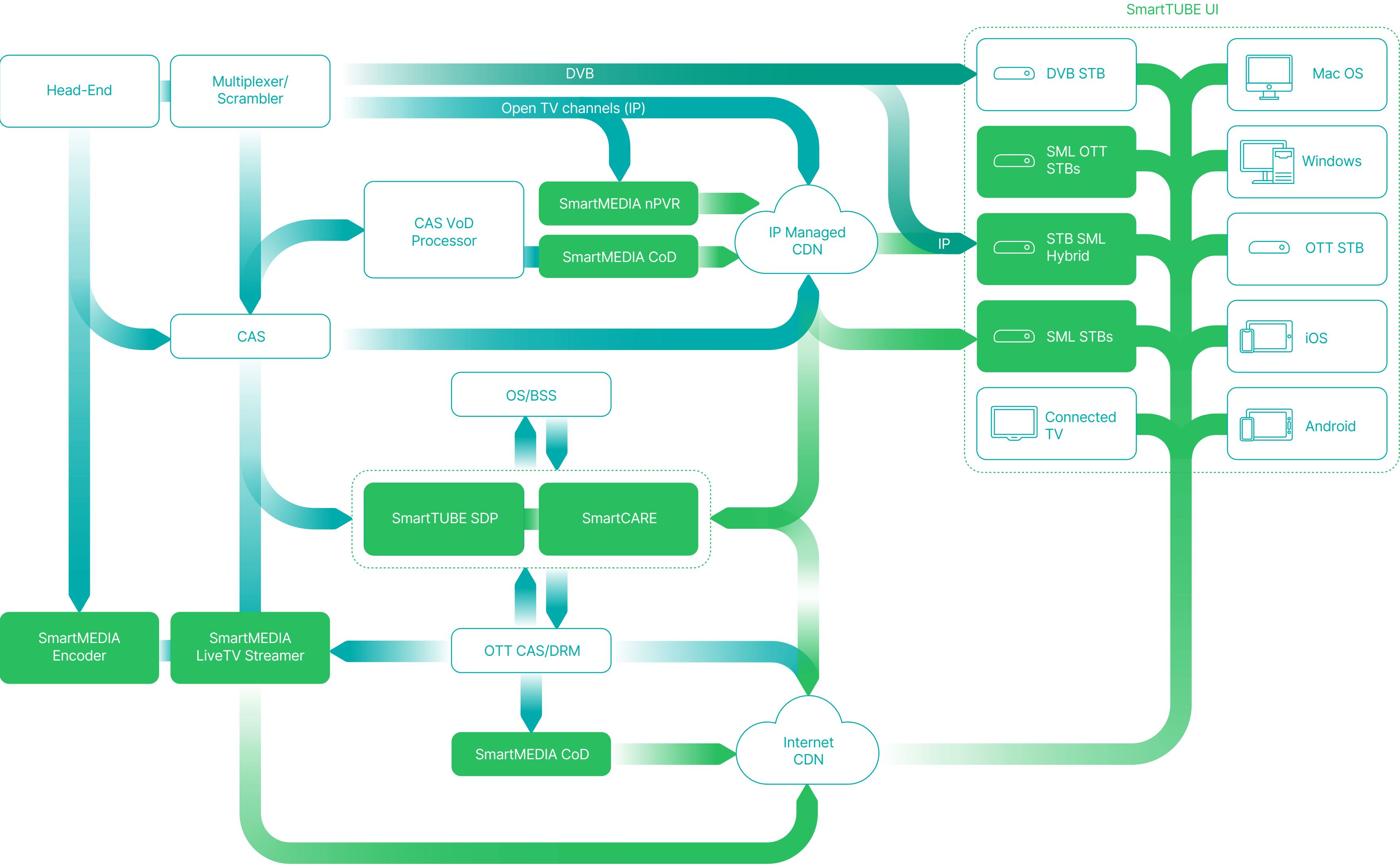
To better understand Smartlabs leading products, the solution map displays the full range of cutting-edge interactive solutions for STBs, Smart TVs, PCs and mobile/handheld devices.



Platform	Benefits	Considerations
Linux	<ul style="list-style-type: none">• Cheaper and easy to roll-out to market• YouTube is available with official certification• Other content providers are possible, even for small service providers through direct content contract or content distributors• Optimized memory and CPU requirements• Full control of STB software from manufacturer, with the possibility to implement custom features and optimize performance and video playback	<ul style="list-style-type: none">• Greater dependency on middleware and STB vendors• Fewer third party apps• Netflix is almost impossible to certify
AOSP	<ul style="list-style-type: none">• Most third-party apps are available, which enables wide subscriber choice• Allows operator to cherry pick applications and use its own analogue of Google Play Store.• Almost full control of STB software and the possibility to use IR remotes only, which are cheaper than Bluetooth ones• No requirements to use the latest System on a Chip and Android version, which makes it more affordable	<ul style="list-style-type: none">• Netflix is not available• A lot of cheap STBs in the market do not fit operator requirements• Requires a management platform for system software and application upgrades• Not all functions of IPTV, like multicast streams, are supported out of the box and require additional development.• Voice search and Chromecast functionality is not a part of AOSP and require additional software to implement
Android TV Operator Tier	<ul style="list-style-type: none">• Official Google Playstore, You Tube, Widevine and Playready support is included in the platform• Certification process includes tens of thousands of tests to ensure the user experience is verified and the product meets Google's quality standards in terms of UI performance, video playback, stability and security• Integrated voice search• Chromecast functionality	<ul style="list-style-type: none">• Google only supports big projects. Each project is bespoke, long and has a large certification process with a lot of participants• Major software upgrades require additional certification of the whole product, so if you have three STB suppliers you have to recertify all of them• ATV product includes STB itself, and all installed software. STB vendor, UI supplier and operator are three parties participating in the certification together, which makes it difficult to change device manufacturer or have several STB suppliers• Additional certification required for Netflix• Less control of STB software, a lot of restrictions from Google.• Play Store is obligatory with no restriction over access to competitors' apps• ATV STB must use latest hardware, because Google makes hardware requirements higher every year. Vendors must upgrade to a newest version of Android each year for 3 years after launch. This makes ATV boxes more expensive than AOSP with which it is possible to use less expansive hardware and earlier versions of Android OS• Integrated voice search requires more expensive Bluetooth RCU

To better understand Smartlabs leading products, the solution map displays the full range of cutting-edge interactive solutions for STBs, Smart TVs, PCs and mobile/handheld devices.

Solution Map



Content Considerations



Content Considerations

To deliver a successful video service, it is essential that very early on in the planning process you determine what content you want to offer and what you need in order to get it.



Smartlabs customers are located all over the globe, from Brazil to the Czech Republic and although there are territorial variations in copyright and regulatory regimes, a big consistency is the need to have content agreements in place. One approach is to work with a specialised content consultancy that has pre-established relationships and will help you navigate the complex ecosystem of distribution. 3Vision are experts in this field with decades of experience in negotiating and securing the best terms for operators.

Whether it's delivering the most popular linear TV channels in a market or enabling your customers to download programmes to watch at their leisure, these rights will need to be negotiated. There will be financial and technical implications depending on what you are asking for and the way you want to deliver it. To avoid disappointment during the content acquisition process, it is fundamental to plan your content approach. This should be in parallel with your product roadmap and business/revenue plan.

Smartlabs supports services that deliver all types of content. To make the most of the functionality, content must be available and agreements in place with the rights owners.



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Types of Content



Types of Content

When you are launching a new service you will have content requirements. At an early stage you will need to model your costs as part of your overall business case and then work on modelling your offers and negotiations for the financial impacts they may have.

All of this will then form part of what should be a comprehensive content acquisition strategy. Although some territories have differing regulatory and copyright regimes, typically if you are doing anything with content you need to secure the rights to do that.

Free Linear TV Channels

Often delivering the most popular local shows and the biggest audiences, these are the public and commercial broadcasters in a market.

There are lots of considerations when dealing with Free TV channel groups and this can be one of the most complicated aspects of launching a video service. Components of a Free TV relationship now can include:

Linear Transmission – Commercial approaches vary by territory. A service provider could be required to pay the channel for distributing them, they may have specific technical delivery requirements and there may be other regulatory factors.

‘Smartlabs enables operators to reduce CAPEX by storing content in the cloud, as an option, rather than incurring the expense of investing in hard drive and STB storage.’

Multi-screen – Delivering content to more than one device in and/or outside of the home.

Relatively straight forward to negotiate if content is being delivered in the home to devices over the service providers’ network. More complicated if you are seeking to deliver the content to devices outside of the home on networks not owned by the service provider. There are restrictions on the number of devices and the number of concurrent streams (number of people watching a stream of content at the same time).

Free TV Channels can be hesitant to grant multi-screen rights if they have their own strong digital presence. Their preference is to direct audiences to their own digital service. There is almost always a fee that the service provider will need to pay the Free TV Channel for delivering their streams over the open internet to devices.

Network Personal Video Recording (nPVR) - the storage of content on the television service provider’s servers (in the service providers network or in the cloud) rather than in the hard disk (local storage) on the consumer’s STB.

Smartlabs enables operators to reduce CAPEX by storing content in the cloud, as an option, rather than incurring the expense of investing in hard drive and STB storage. However, this needs to be carefully considered by operators, as Total costs of ownership varies from business to business and a hybrid solution may be preferable.

An operator’s own subscribers can enjoy the often-unlimited access to shows they have missed and operators can even increase revenues by charging for this functionality. But this is a challenging ‘right’ to deal with as it often varies by content owner and is heavily dependent on the legislation in a given territory. Before you invest in a nPVR product, it is essential to understand how nPVR is treated in your territory. If this is a route you would like to explore then Smartlabs can support you during the rights negotiation process. A content consultancy like 3Vision can answer content owner questions like ‘how many hours of our content will be stored’, ‘for what duration’ and ‘can we insert ads?’.



Catch-up / Replay TV / Reverse EPG / Start-Over – programming available on demand, typically after a show has premiered on a Linear Channel.

Free TV Linear Channels operate differently and their standard approach (although it varies by territory and by broadcaster) is to direct audiences to their own digital services. If you are very keen to offer on demand access to Free TV Channel content, then the conversation is likely to be about integrating their Streaming Service.

As part of a Pay TV Linear Channel negotiation, it is commonplace for the agreement to include a volume of assets for the service provider to make available in their Video on Demand section. The amount of time you will be able to offer those assets for and the refresh rate will all be a part of the negotiation process.



Pay TV Linear Channels

Typically only available to consumers who subscribe to a video service. Pay TV Channels can be funded by advertising and the fee they get paid from the service provider.

The majority of deals between the service provider and channel owner includes a variable cost (such as a cost per subscriber). Commercial modelling in the content strategy phase is critical to a successful and profitable service.

Firstly, you will need to determine which channels may be available to you in the market - not all channels are cleared in local markets and so may not be available to you. Some Pay channels are exclusive to a service provider in a particular territory, so there may be availability challenges.

Additional Services

Your proposition will determine whether you will be building your own branded content services and in doing so, investing and negotiating directly with content owners.

A huge variation of Films and TV shows can be licensed – the age of that content and the way you want to deliver it to your customer will impact its availability to you and the cost you will need to pay.

Content owners, specifically the Hollywood Studios, have for years operated their licensing activity in numerous ways. The opportunities available to you come with different commercial models, budgets and risk.

Transactional Video On Demand (TVOD) (AKA PPV)

Films and TV series available for rental (typically stored for 48 hours). Usually available approximately three months after their release at the theatre (although this is rapidly changing). Service providers are required to pay minimum guarantees and will share the purchase revenue with the content owner.

Electronic Sell Through (EST)

Films and TV series available for purchase by consumers with local download. These can be made available to a service provider as early as the day after its theatrical release. They are offered at a wholesale price by the content owner with discounts available for large volumes.

Subscription Video On Demand (SVOD)

Programming made available to consumers for an ongoing fee, usually monthly. Usage is not limited. Flat fees on a per title basis are usually paid to the content owner.

Advertising Video On Demand (AVOD)

Content can be watched for free with advertising inserted to fund the service. Content owners and service providers share in the revenue.

Third-Party Streaming Services

Third-party providers may allow a simple integration with your service, but there are different types of partnerships with owners of Apps depending on the level of integration:

- Marketing partnerships allow service providers to provide customers with discounted incentives to subscribe. Typically, a service provider will purchase a number of discounted retail vouchers
- Basic retail partnerships involve the service provider retailing the streaming service as part of their offer at an agreed retail price. The service provider may get a referral fee from the App for every new subscriber

- Long-term bundles are the service provider including the App as part of their proposition, for example signing up to Amazon Prime Video for 12 months as part of the basic retail pack. A discounted wholesale price is agreed and minimum guarantees decided based on the number of bundled subscribers

3Vision's Top Tips

- TVOD is great for enabling customers access to recent titles but financial commitments to the studios can be expensive
- EST allows service providers to market the most recent titles on their platform but profit margins are typically very low
- SVOD deals can include exclusivities, so not all titles will be available in your territory
- Content available in the AVOD model is usually older and will be available on other services
- If targeting the big streaming services like Netflix, then complying with their product requirements will be essential. Integration of Netflix and other premium SVOD applications is possible with Android TV Operator Tier, but additional certification is required which needs to be factored into the launch roadmap



Negotiating Content Rights



Negotiating Content Rights

The commercial negotiations with the content owners can start once the Content Strategy (type of content, availability, cost and delivery) is in place.

It is essential that you secure the right expertise to support with this process. Services inexperienced in working with content owners can make mistakes which impact their chances of success. Allow plenty of time for the content acquisition process and work in parallel on the product development – the two are inextricably linked. Without the content rights, you will not be able to secure and deliver a first-class product.

Your content acquisition strategy will need to factor in a number of things, including the components of your approach to content owners and services - which will be critical to your success. The pitch to content owners, physically represented with an introductory presentation for circulation, needs to be clear on what you ask for and how you present the opportunity.

Our content partners (3Vision) recommend developing a presentation which covers at a minimum the following:

- Company Background
- Proposed Product and Consumer Proposition
- Technical Architecture and Partners
- Target Audience and Subscriber Projections

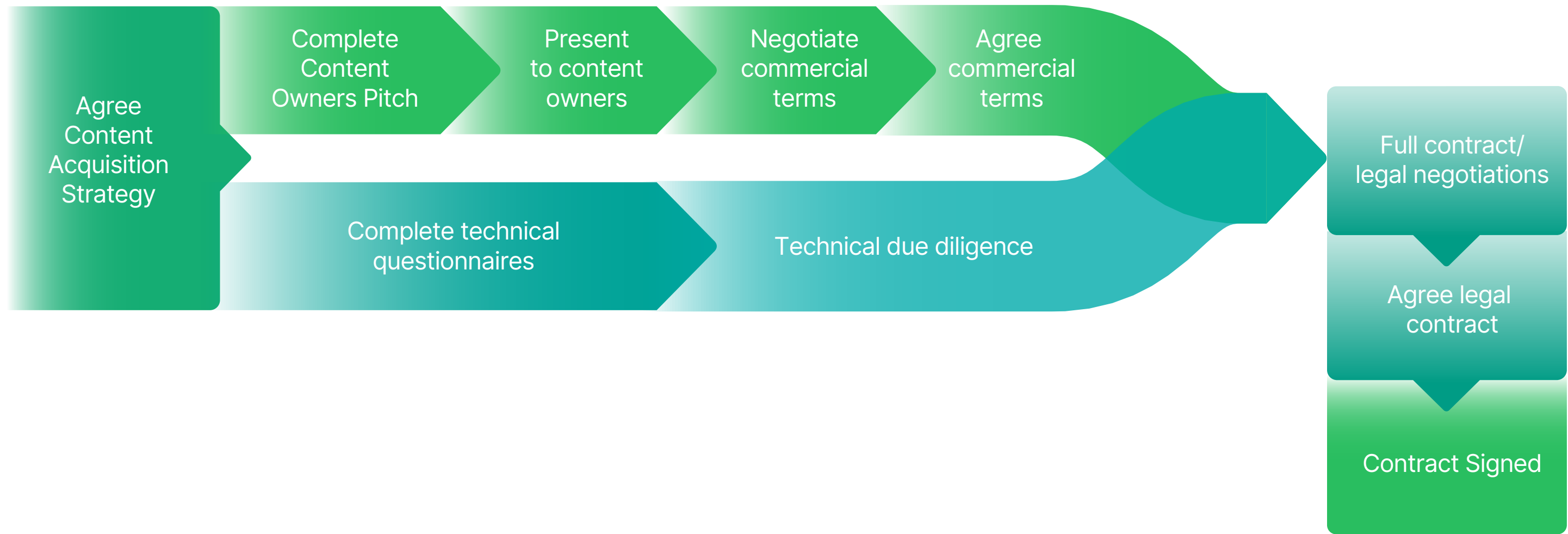
The more robust a proposition and the detail you can provide the stronger your position. The process can take anywhere between six and twelve months. Starting as early as possible gives you more leverage to negotiate the best deal.

Passing the technical due diligence stages in the process is an essential part of being able to acquire the content you want. Smartlabs is a recognised technology provider and their solutions are Studio approved. This means you are one step closer to launch. Smartlabs will help to guide you through this part and can offer expertise during the process.

Overall, your key considerations should be:

- Identify the content you want
- Determine if it’s available to you
- Understand the likely costs
- Map the content strategy to the product rationale
- Leave plenty of time for the negotiating process
- Secure the right support and expertise
- Develop a strong and detailed pitch presentation for the content owners
- Work with technology providers that are approved by the Studios

The 3Vision Content Acquisition Process



Network Monitoring and Measurement



Network Monitoring and Measurement

Maintaining strong dialogue with your content partners is important. They will want to know that their content is being managed, secure and to obtain information on how it’s being viewed.

Going forward, services need the best monitoring and reporting tools for their own management purposes and these all will help to support content relationships.

A system for monitoring the service quality is invaluable. Understanding and identifying problems in the delivery of video content can help prevent a negative user experience and reduce churn. Smartlabs has a leading software solution for monitoring the quality of video content delivery in IPTV and OTT networks, called SmartCARE. This service makes it possible for the operator to continuously analyse the quality and quickly react to emerging problems.

SmartCARE also provides cluster data and essential insights on subscriber consumption behaviour such as time, day, type of content and household categorisation. This in turn can be used to help shape the content acquisition strategy and recommendations, measure return on investment for marketing campaigns and assist with product and service development.

Preventative Detection of Problems:	A unique feature of SmartCARE is the possibility to detect potential areas of concern in advance
The Use of All Information Obtained:	SmartCARE allows operators to monitor customers current sessions and historical events. Data is available in real-time to the minute
Convenient Set of Tools:	Convenient and functional SmartCARE interface can be used by departments of monitoring, technical support as well as servicing teams to identify potential critical situations in advance
Modularity and Scalability:	Advanced data storage and processing technologies make it possible for SmartCARE to build up existing customer information systems by adding extra modules and hardware almost without limit
Data accuracy:	SmartCARE collects data from both subscriber’s devices and broadcasting servers. This ensures more accurate and detailed information on the quality of video service
Data insights	Cluster data from SmartCARE provides key insights into subscriber viewing behaviour that can help drive strategic decisions across multiple stakeholders (e.g. Marketing, R&D, sales & acquisitions)

Launching a TV service is a challenging process, there is simply no “One-Size-Fits-All” approach that can be undertaken. The current landscape comes with huge complexities and it is important to consider your technology, business models, market positioning, service provision and content strategy. Smartlabs understands the intricacies of launching a TV service, their experience is built up over many years working with clients to support and grow their business. Smartlabs expertise is in helping customers to be aware of issues that may arise, so that they can be avoided and planned for.



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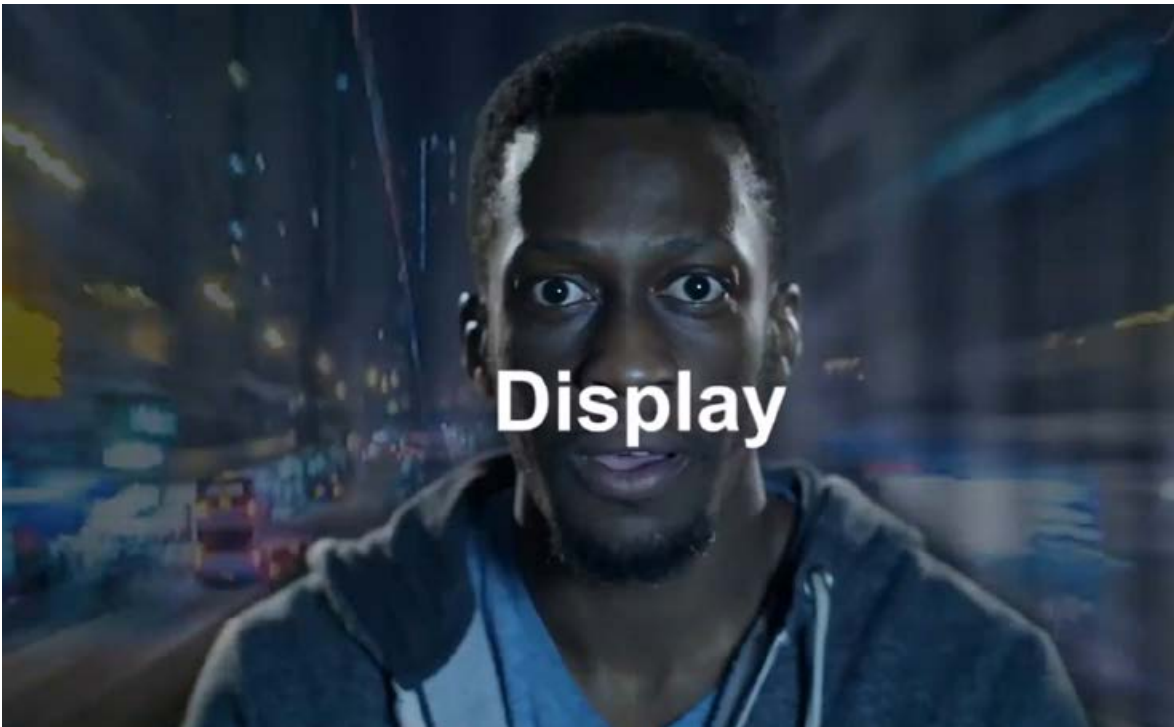


Smartlabs

Smartlabs is a leading provider of software solutions that drive multi-screen, multi-networks for the interactive TV sector. It is also a manufacturer of feature-rich STBs with award-winning designs.

Smartlabs’ solutions deliver content services to over seven million subscribers around the globe on multiple devices from set-top boxes to mobile phones. Its client base includes O2, Rostelecom, baltcom, primetel and OptiTV to name a few. Smartlabs partners with 25 IPTV market leaders including Apple, Microsoft, Google, Samsung and LG. It has offices in Berlin, London, Auckland, Toronto, Moscow and St Petersburg and has over 10+ years’ experience creating innovative solutions for the interactive TV market.

smartlabs.tv



3Vision

3Vision is a global TV content consultancy specialising in rights negotiation, strategy, research and business development in the television industry.

As content industry insiders, 3Vision have negotiated countless successful TV rights deals for our clients. From negotiating new TV content deals to renegotiating existing ones, trust us to guide you through the content acquisition process and secure better terms.

3vision.tv

