



Advanced Digital Broadcast

# Video Ecosystem: An ADB Perspective

William G. Luehrs  
President, ADB Americas  
[www.adbglobal.com](http://www.adbglobal.com)



## Introduction to ADB

- Global STB & mediacenter technology company
  - founded in 1995, Revenues of \$176m in 2004
- ADB Division: High-end Set Top Boxes for Satellite, Cable, Terrestrial and IP Delivery
- Osmosys Division: MHP and OCAP based middleware, related tools and services
- Headquartered in Switzerland, strong R&D, global sales and marketing, outsourced manufacturing, 400+ employees
- Leadership position in key growth markets: MHP STBs in Europe
- Partnerships with leading end to end system suppliers worldwide

# Convergence is happening



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Consumer market demand for voice, data, and video is exploding as digital technology finally enables real convergence

# How will this convergence come together?



- A three legged stool:
  - Compelling content
  - Effective content distribution
  - Underlying technology platforms

All must come together in a way that rewards the participants for their contributions...  
and is affordably delivered to the consumer

# Compelling content



It's out there, its available, and it's exploding:

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- Digital video content, hundreds of channels, growing VOD libraries, and HDTV put huge pressure on bandwidth...
- High Speed Data getting larger by the day, file sharing, rich bulky files, photos, video clips...
- Voice, VOIP, SMS, MMS, mobile/land line based..

## How will this content be delivered to the customer?



Key operator partners will be STB suppliers who can integrate “best of breed” partners:

- Middleware (differentiation, back office integration, multi-vendor STB environment, DRM)
- CAS suppliers
- Content providers
- NEPs (high speed backbones, encoders)
- Chip suppliers with highly integrated cost effective solutions



## There will be two places in the home where interactivity and convergence come together

- The home entertainment (media) center, for the enjoyment of light information and entertainment  
Stocks, weather, simple ordering, chat, SMS, caller ID, WWW.walled garden, video and audio entertainment...
- The den, for real work  
e-mail, pay bills on line, surfing, blogging...

## ADB believes the center of this interactive world will be the STB as a “Mediacenter”



- Video home entertainment centers are at the epicenter
- The PC in the den is one connected appliance to the network
- STB will require
  - Very high data rates, both up and downstream
  - Mass storage capability (DVR)
  - Wired and Wireless connectivity through the home
  - Memory and headroom for applications



## A rich opportunity for standards to emerge that easily interconnect appliances



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- Will drive affordable offerings through multi-vendor environment
- Shorter development cycles
- Protect investments
- Reduce support costs
- Takes the operator out of the vendor integration role affording more time to focus on growing and supporting the business

## What is the winning formula and who will win?



- Players that embrace standards based technologies
- Emphasis on high quality, affordable technology
- End to end system capabilities and willingness to partner for “best of breed” solutions
  - Encoders and decoders, middleware, CAS...
- Flexible Solutions:
  - HDTV capability is a given
  - MPEG2 +H.264 AVC + VC-1 +AAC

## Looking Forward



- The consumer will have more choices than ever and operators must focus on customer acquisition and retention
- The technologies and standards will be in place over the next 36 months
- The content is out there, its available, and it's exploding
- Suppliers and operators must work together to accelerate this exciting new era!