

Project NIMS Industry Dialogue Briefing

Presented by:
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Senior Director
Next Gen Infrastructure
IDA Singapore
2 September 2009



Joint Collaboration

Objective of Briefing

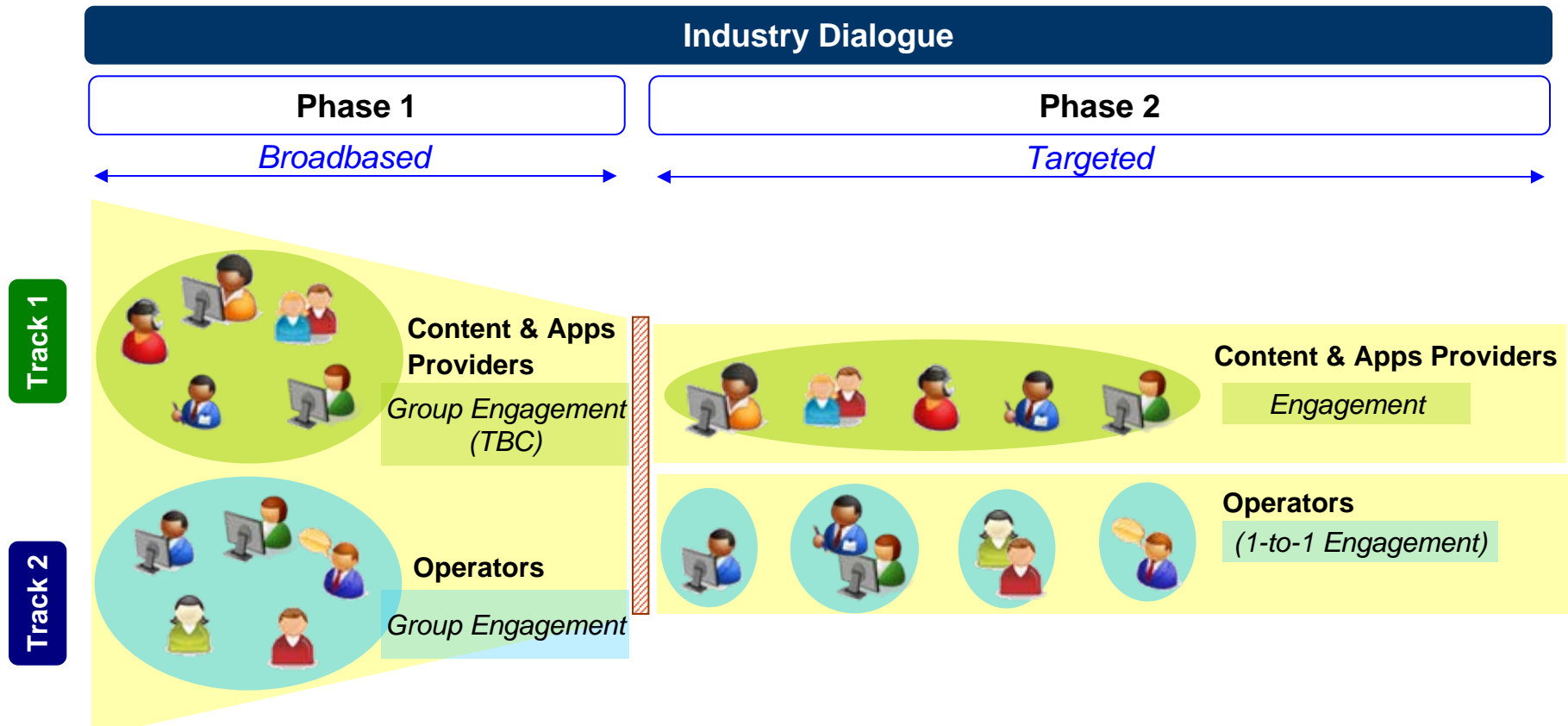
- > **Project NIMS Industry Dialogue Briefing 1 on 12 Aug 2009**
- > **Clarifications received from industry**
 - **Share responses to clarifications with industry**
- > **To provide update on next steps after submission of responses**

1

Recap: Project NIMS Industry Dialogue

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Industry Dialogue Process



> Phase 1

- Evolution of ecosystem to achieve NIMS vision
- Understand, key considerations, technology trends, etc
- Pre-Qualification into Phase 2

> Phase 2

- Targeted dialogue with specific participants
- Understand proposed models, and key regulatory considerations

Summary of Areas Seeking Industry Views



Content Rights Holder

Channel Providers

Pay TV Retailers

Video Delivery Platform

Active Network

Passive Network

Customer Premises

1

2

3

4

5

6

7

I

- Evolution of ecosystem to achieve vision in mid-term
- Key collaborative or complementary ecosystems

II

- End User Experience

III

- Create interactive content
- Develop market players
- Catalyze interactive multimedia apps
- Business model

IV

- Value chain impact
- Service offering
- Risks
- Technical specifications

V

- Standards

VI

- TV Commerce

VII

- Manpower

Legend

- Target Track 1 participants
- Target Track 2 participants
- Target all participants

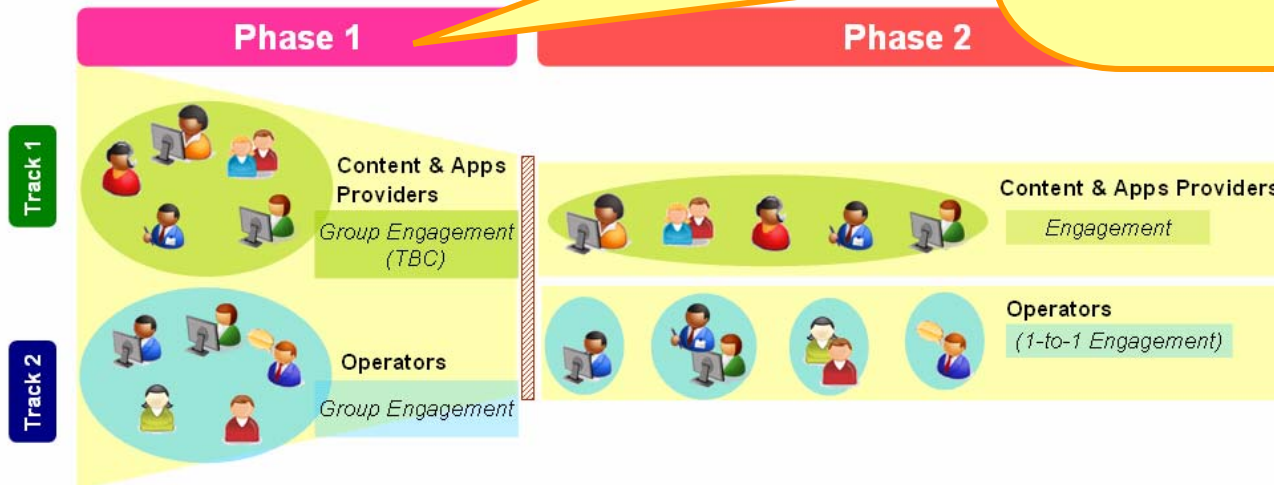
** This industry dialogue process is independent of all other ongoing IDA/MDA consultation*

NIMS Industry Dialogue Phase 1

Objective

To seek industry's views on the strategy to develop

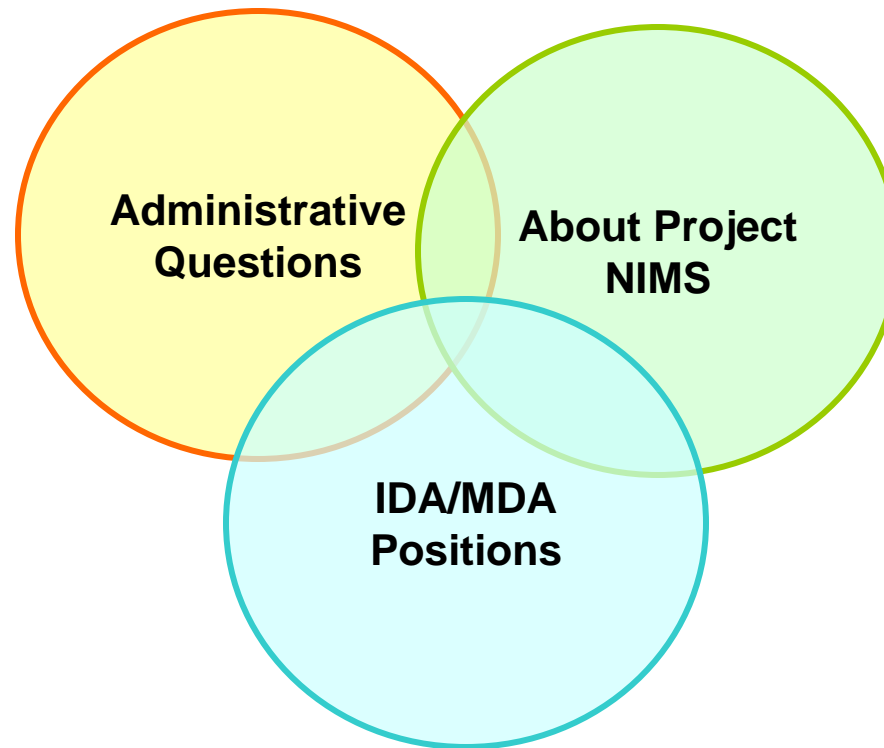
- Phase 1 of NIMS ID as a “divergent” phase
- Maintain open mind to hear views from the industry
- Inputs from Phase 1 to shape detailed discussions in Phase 2



2

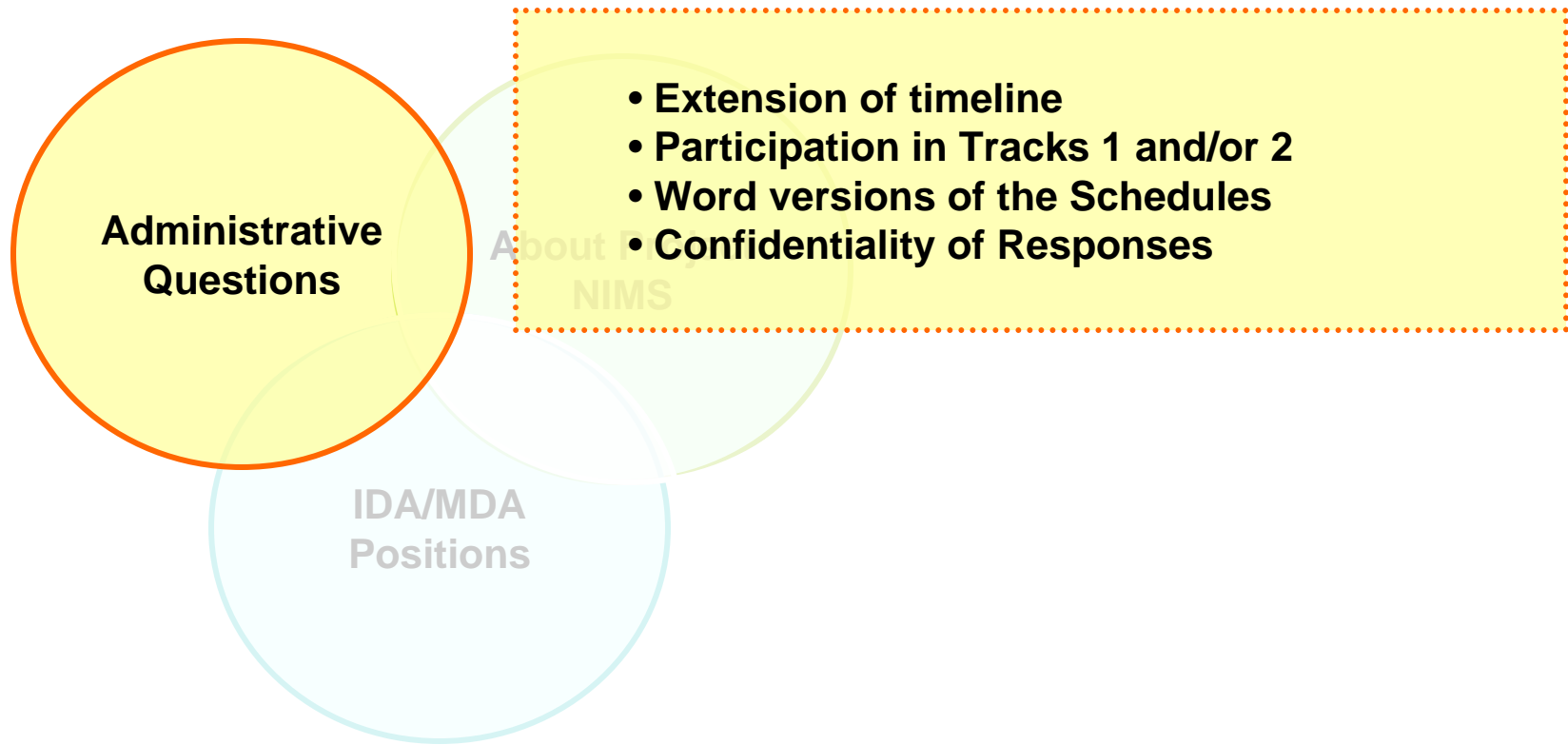
Summary of Clarifications Received

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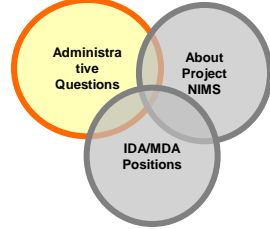
Summary of Clarifications Received

Administrative Questions

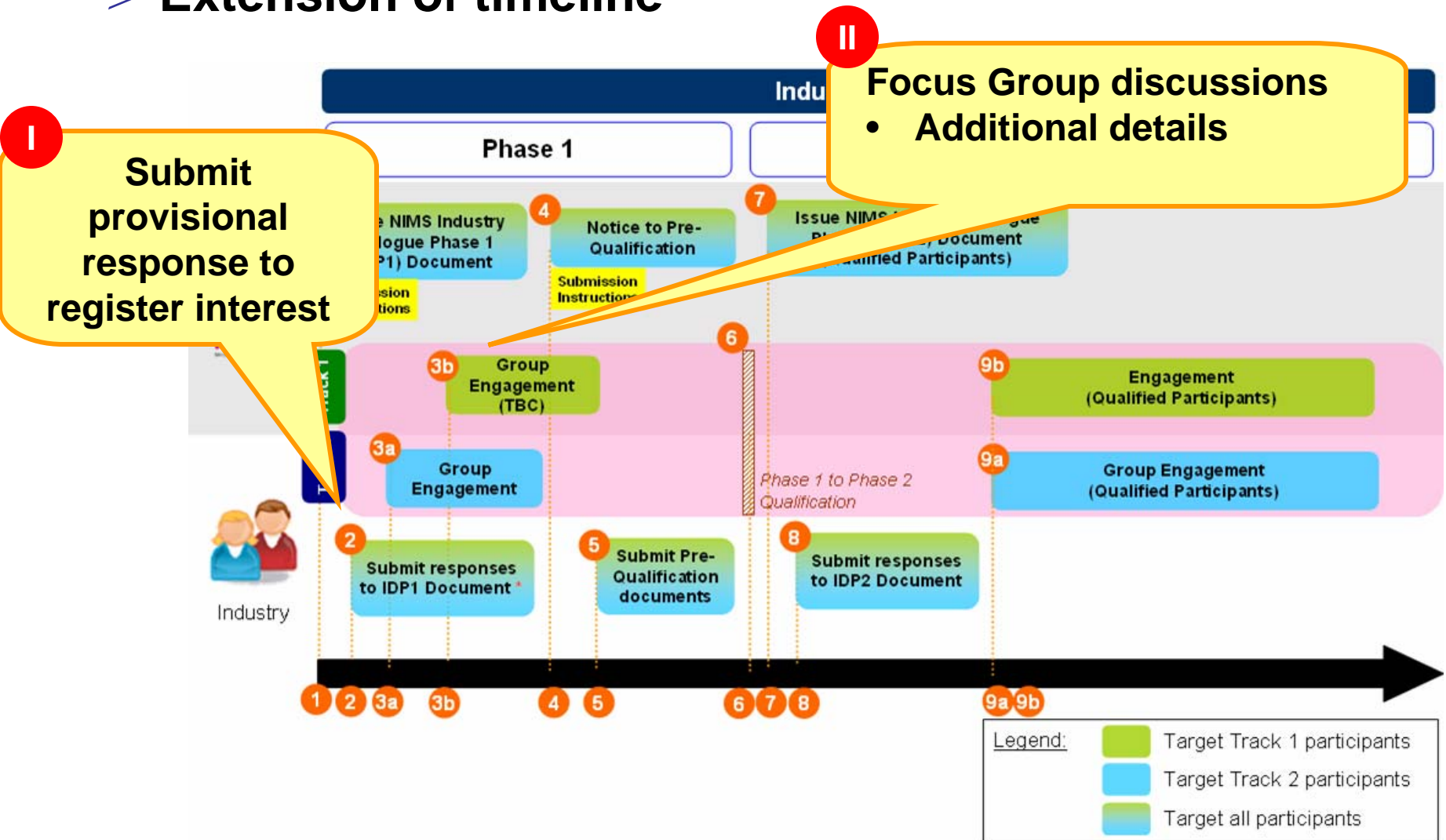


Summary of Clarifications Received

Administrative Questions

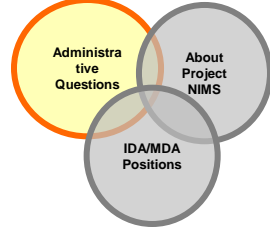


> Extension of timeline



Summary of Clarifications Received

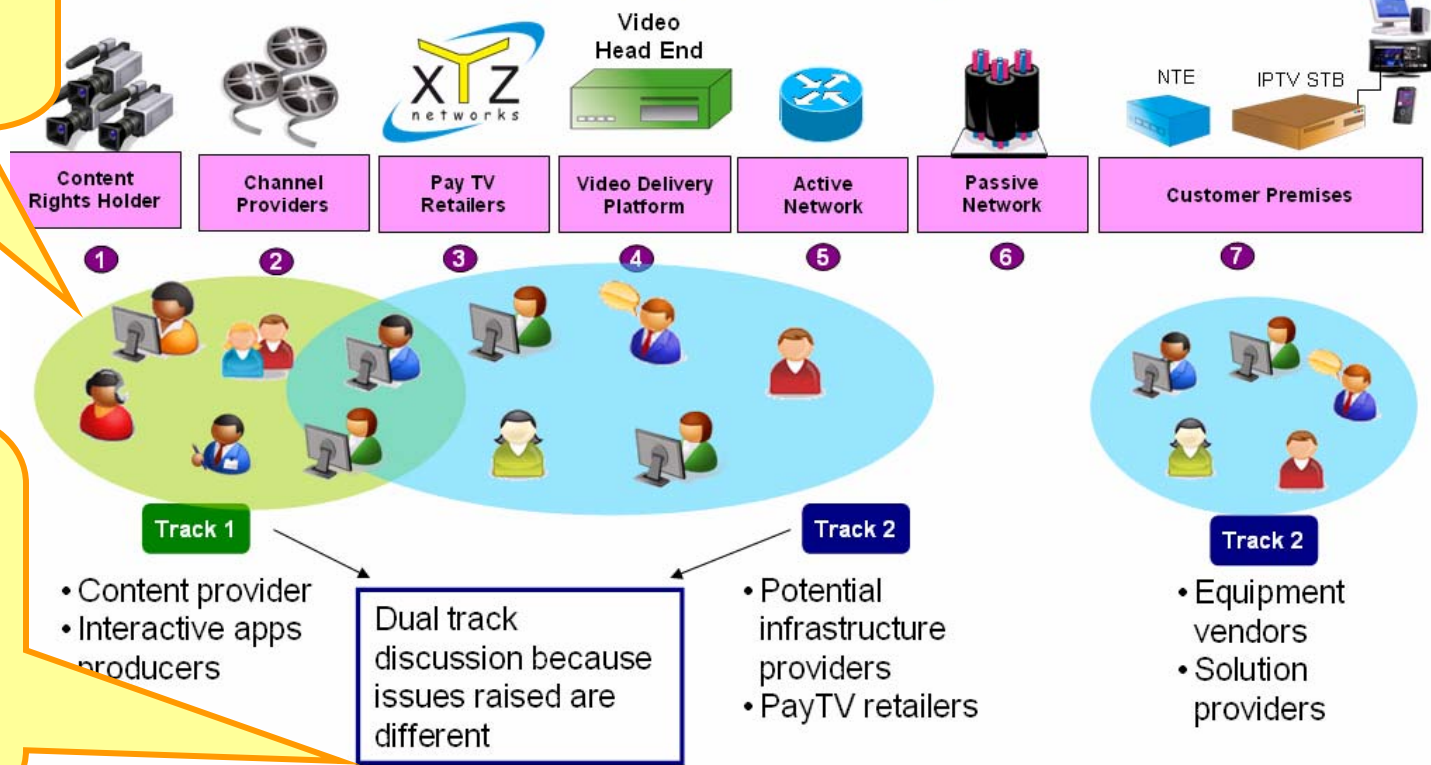
Administrative Questions



> Participation in Tracks 1 and/or 2

Participants to indicate track participation in Schedule D

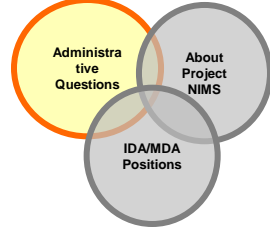
Who Should Participate? Why 2 tracks?



- Welcome to participate in both tracks
- Depends on area of interest

Summary of Clarifications Received

Administrative Questions

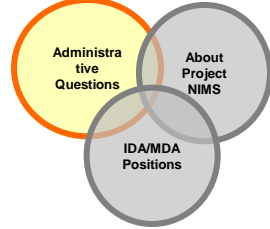


> **Word versions of the various Schedules**

- **Part D and Schedules made available for ease of submission**
 - **Email to broadband@ida.gov.sg**

Summary of Clarifications Received

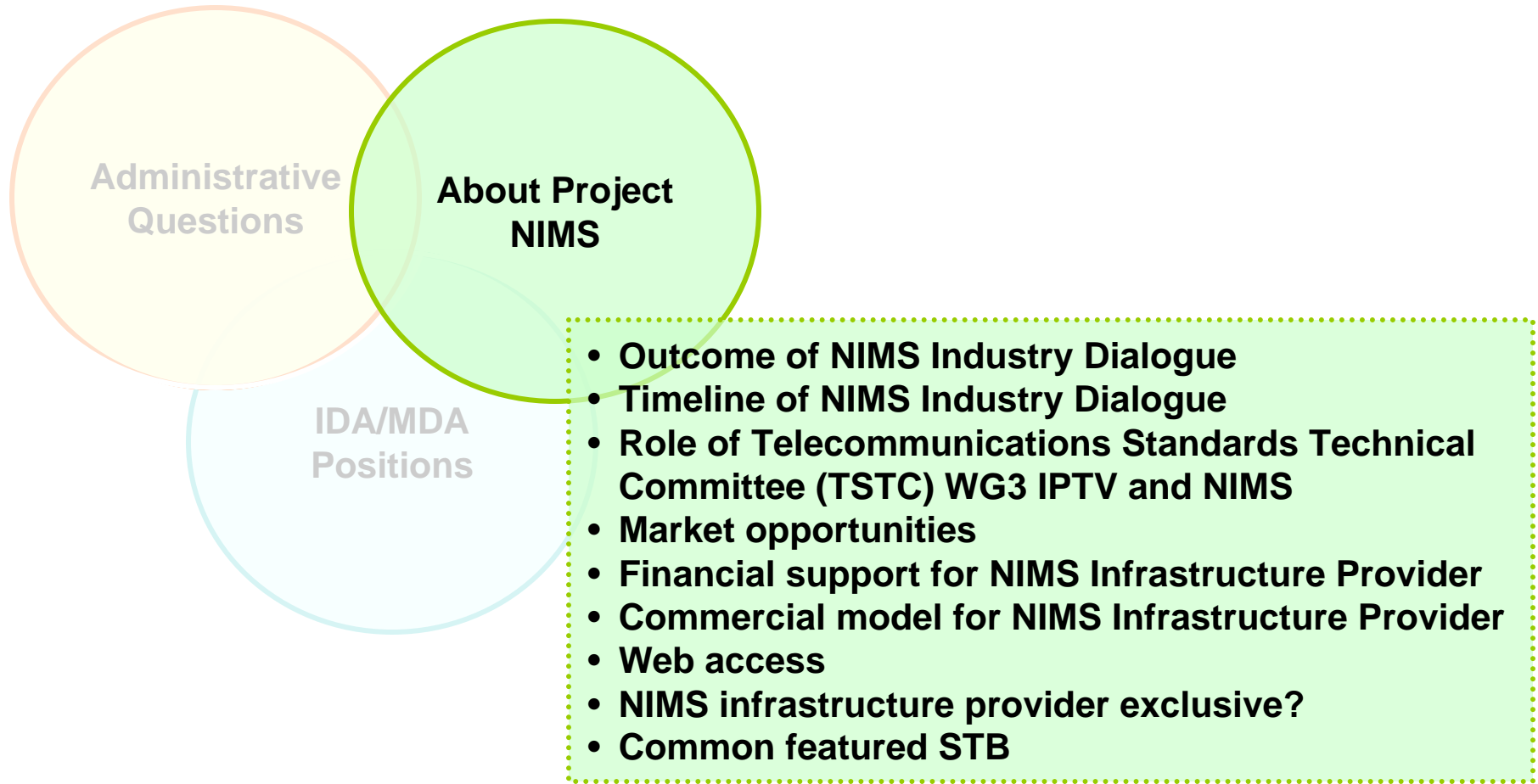
Administrative Questions



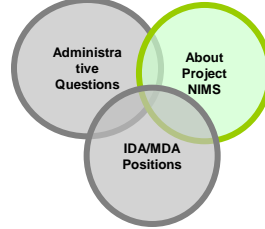
> Confidentiality of responses

- Responses will not be made public
- Only aggregated or summarized responses will be shared
- Participants should clearly indicate confidential sections of responses

Summary of Clarifications Received About Project NIMS



Summary of Clarifications Received About Project NIMS



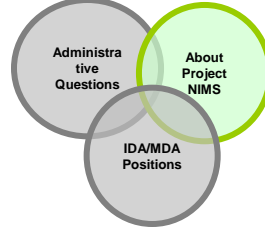
> Outcome of NIMS Industry Dialogue



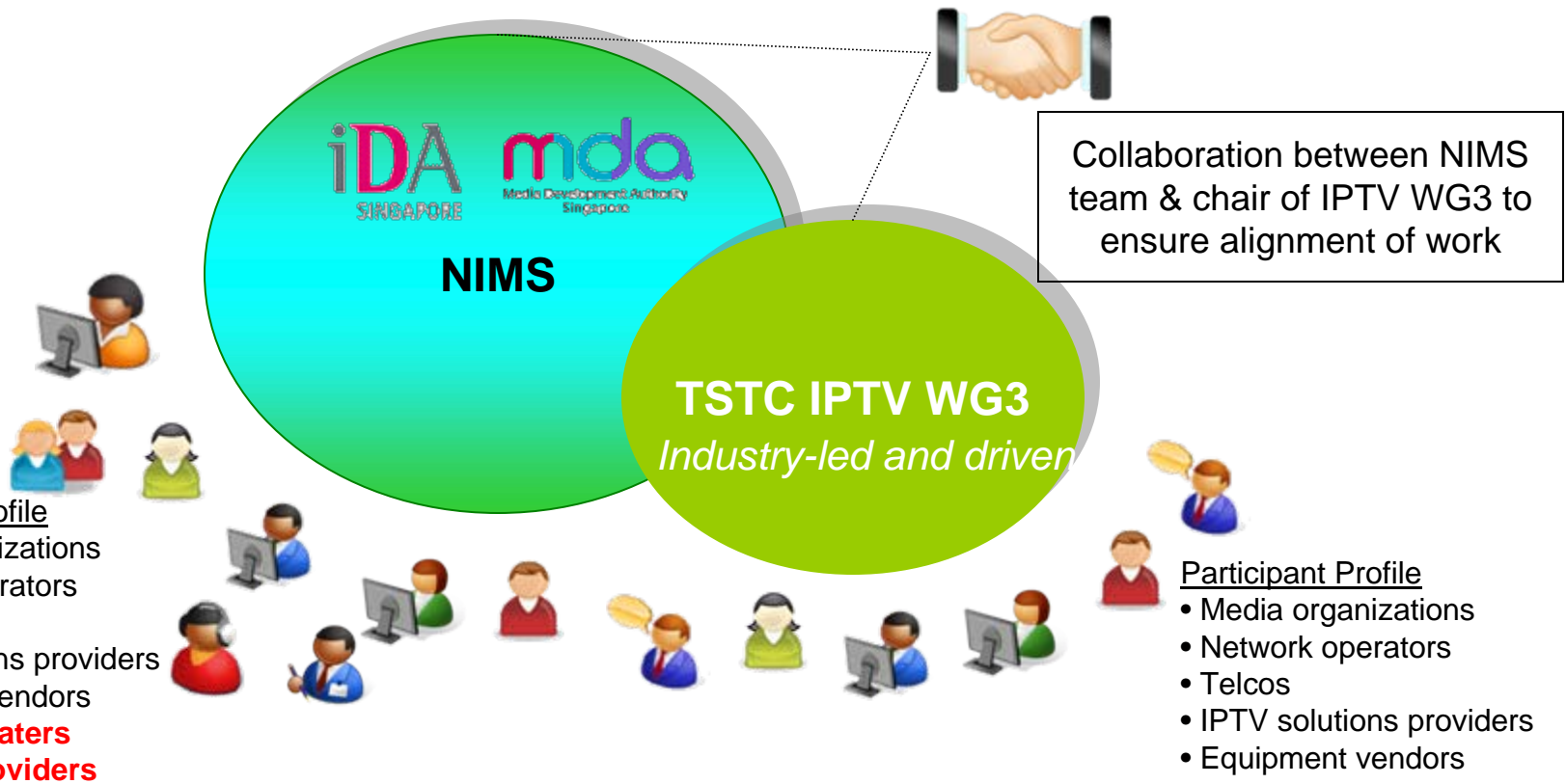
What happens next?

??

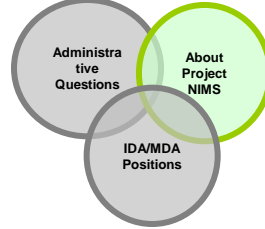
Summary of Clarifications Received About Project NIMS



> Role of TSTC WG3 IPTV and NIMS

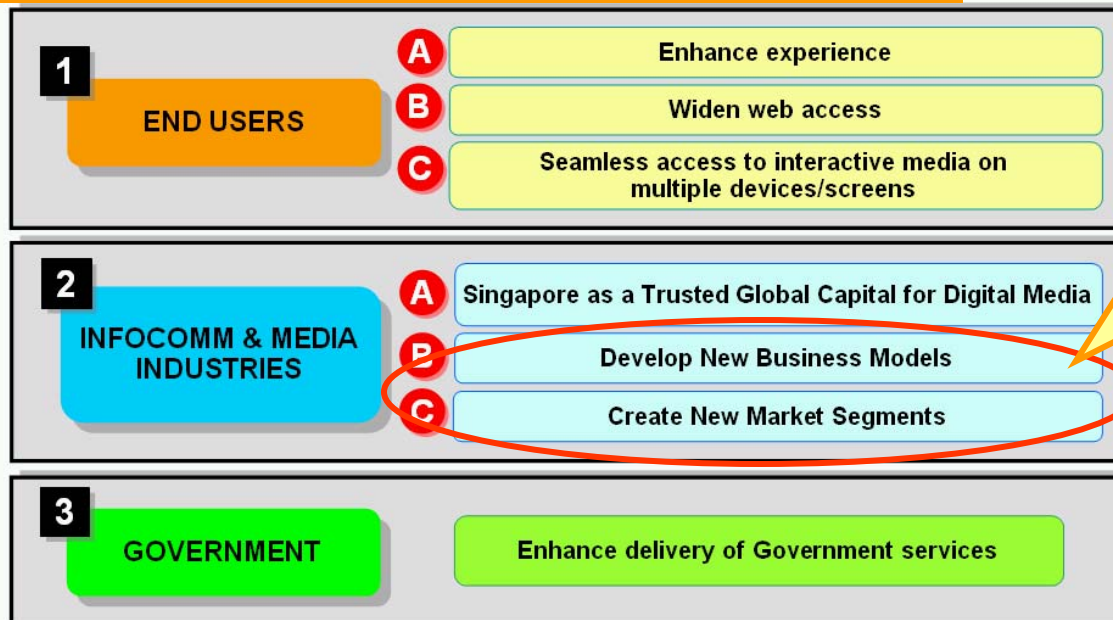


Summary of Clarifications Received About Project NIMS



> Market opportunities

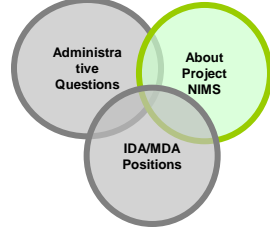
Recap: Desired Outcome of Project NIMS



Summary of key consultancy findings

- Will be shared with NIMS participants in subsequent sessions

Summary of Clarifications Received About Project NIMS



> Financial support for NIMS Infrastructure Provider



IV

- Value chain impact
- Service offering
- Technical specifications

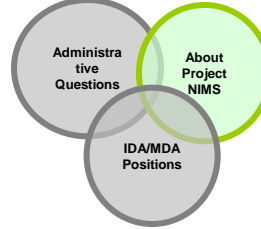
To understand

- Risks faced by NIMS Infrastructure Provider
- Role of Govt in mitigating risks
- Sustainable business models

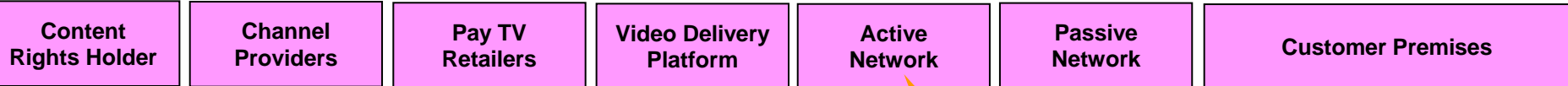
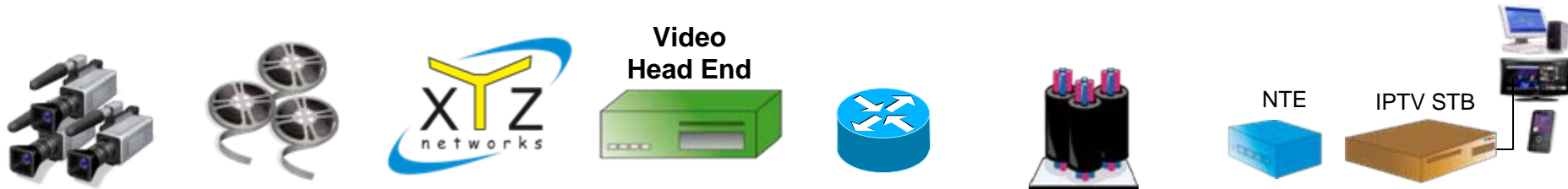
- Risk
- Techn
- infrastructure provider
- Service and content protection standardization?
- Middleware standardization?
- Common Featured STB feature categorization
- Provision of infrastructure components

Legend	
	Target Track 1 participants
	Target Track 2 participants
	Target all participants

Summary of Clarifications Received About Project NIMS



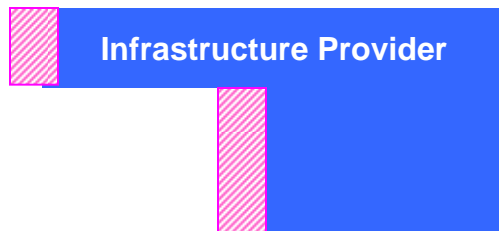
> Commercial model for NIMS Infrastructure Provider



Model 1



Model 2



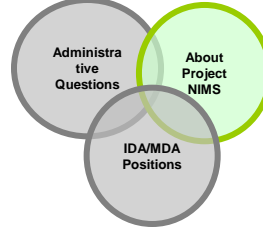
Model 3



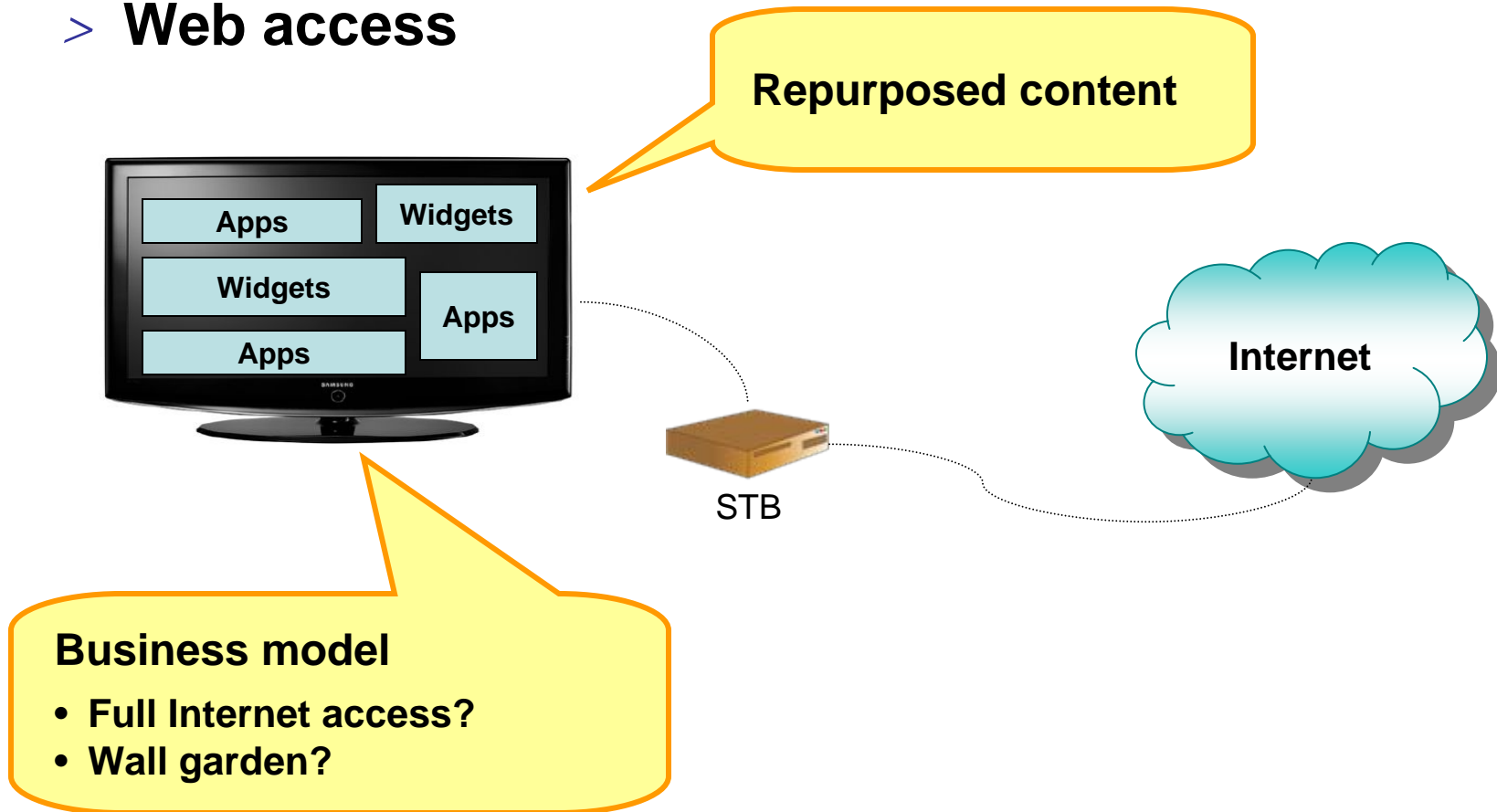
Active Network Provider

- Not limited to Next Gen NBN OpCo (ie Nucleus Connect)
- Can refer to other operators on other transport platforms

Summary of Clarifications Received About Project NIMS

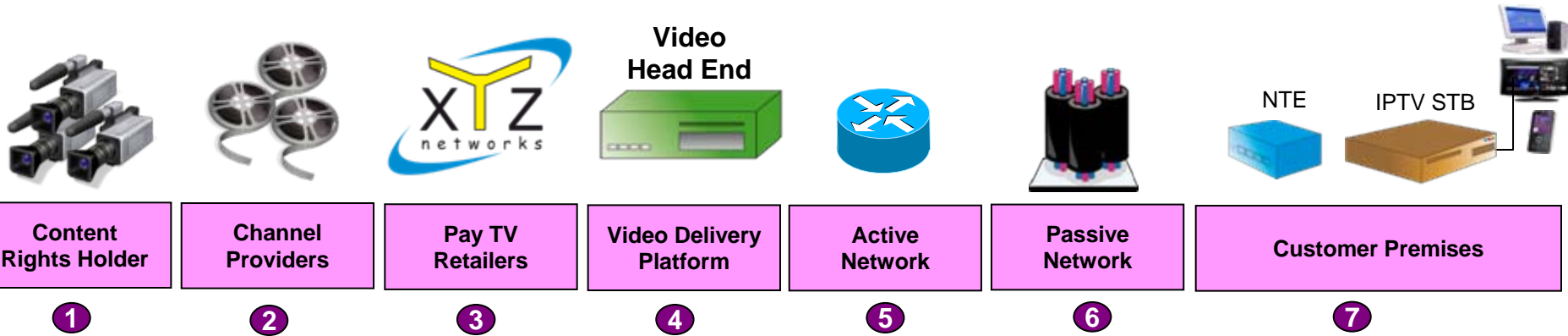


> Web access

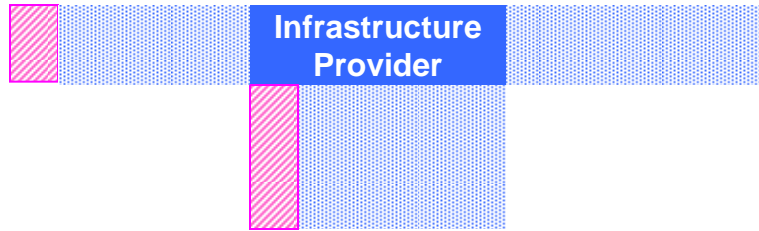


Summary of Clarifications Received About Project NIMS

> NIMS infrastructure provider exclusive?



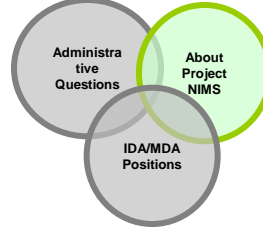
NIMS Infrastructure Provider



Other Infrastructure Provider ?

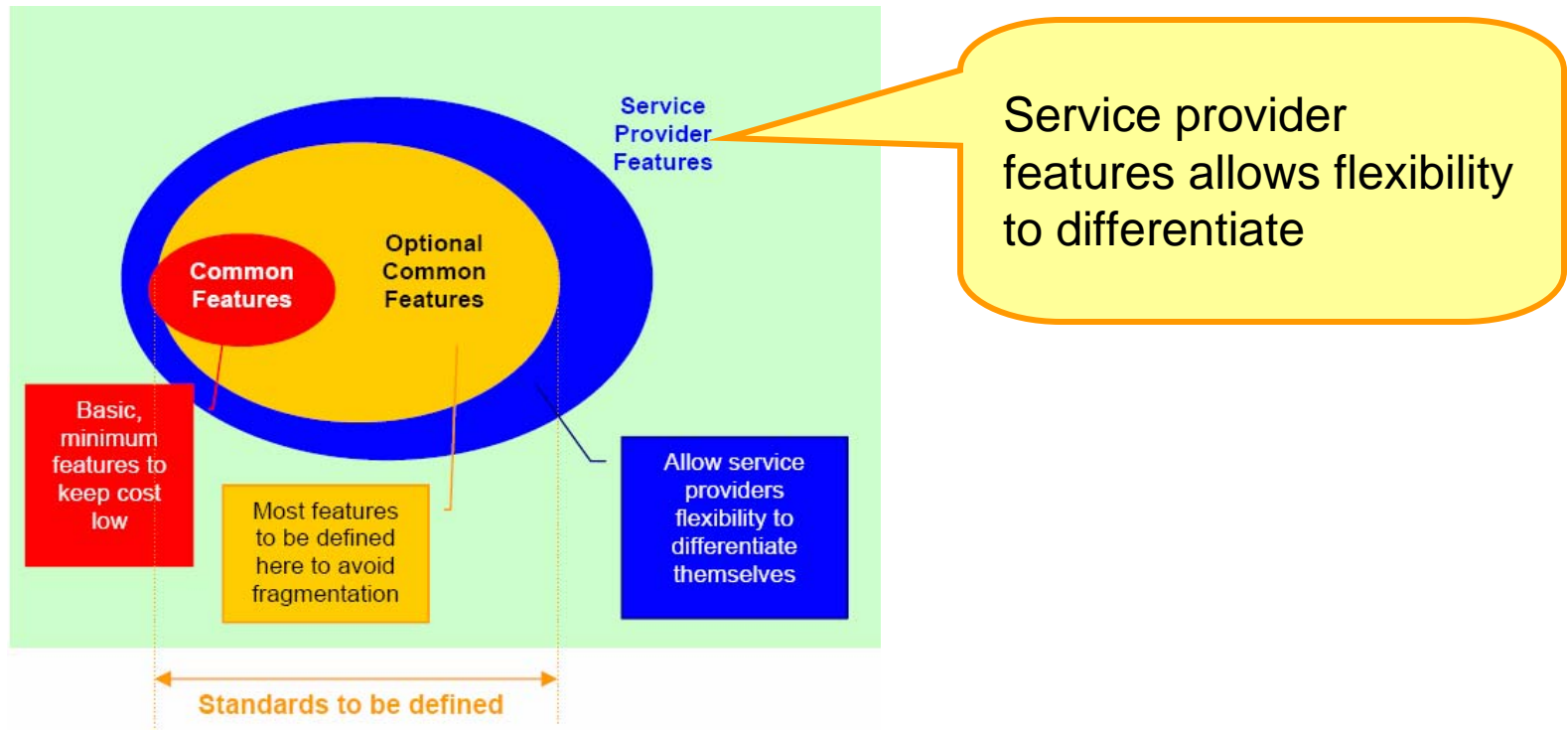


Summary of Clarifications Received About Project NIMS



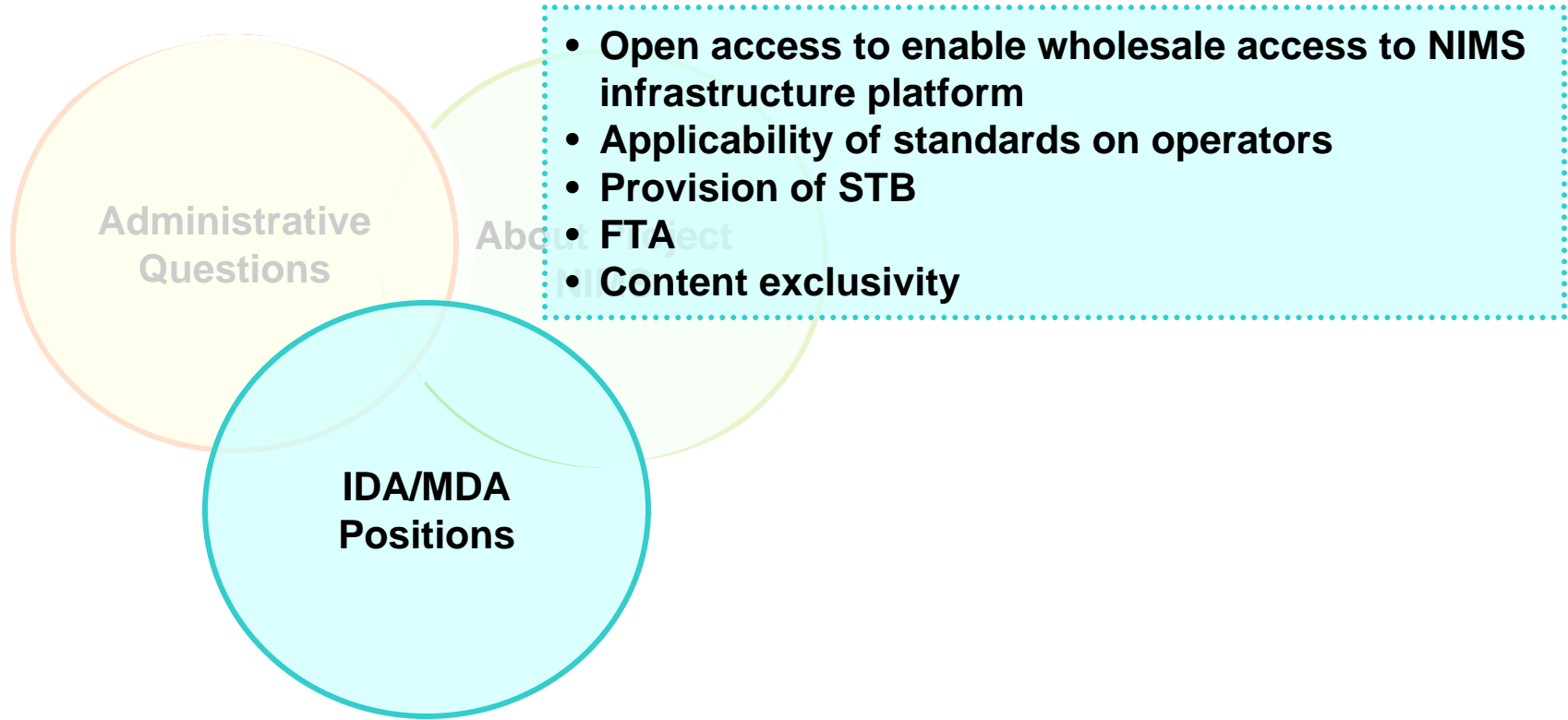
> Common featured STB

- Operators see the need to differentiate



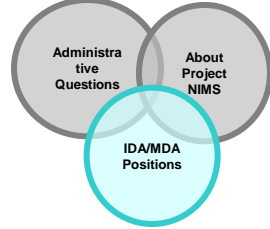
Summary of Clarifications Received

IDA/MDA Positions

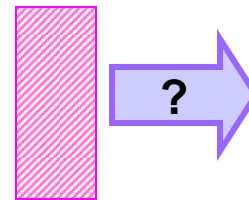
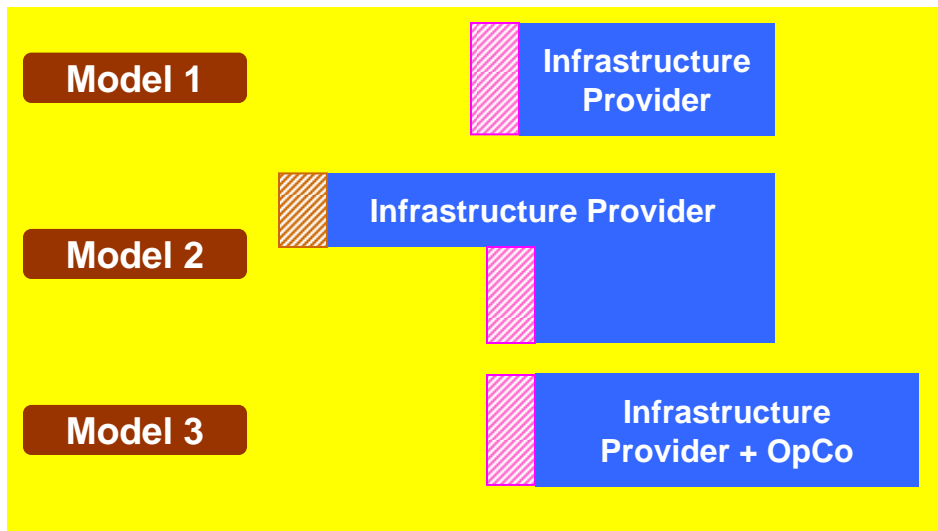


Summary of Clarifications Received

IDA/MDA Positions



- > **Open access to enable wholesale access to NIMS infrastructure platform**



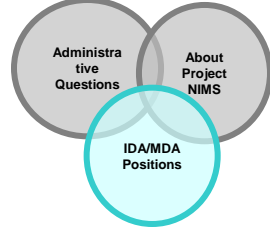
Rely on market forces, no open access regulation imposed

Separation requirements

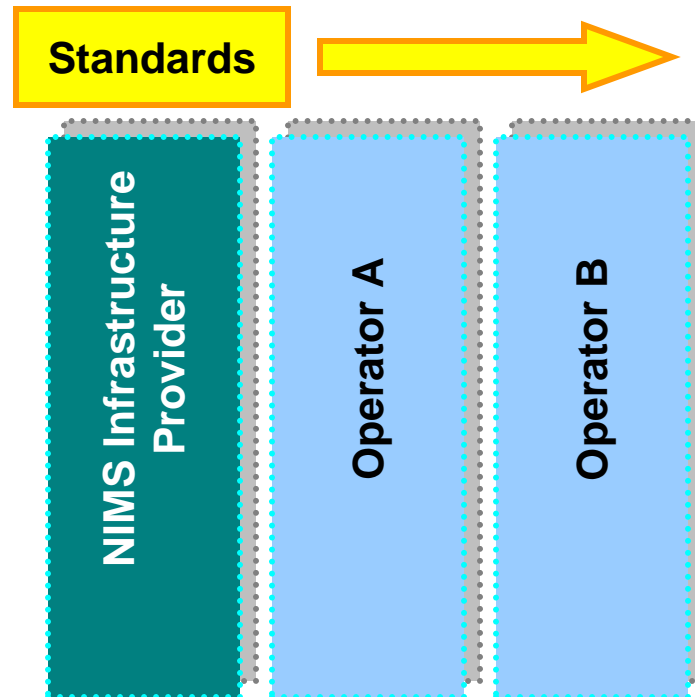
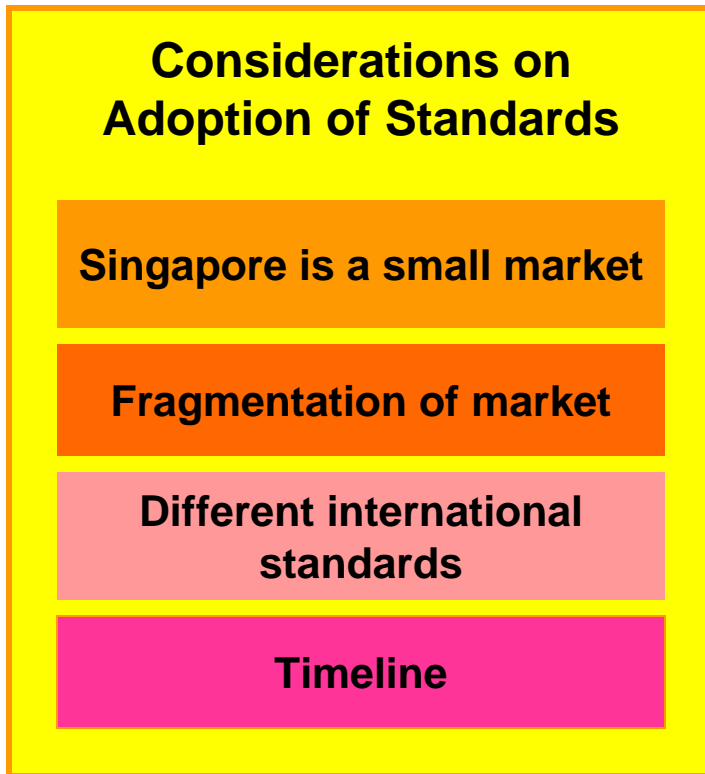
Price control

General obligations for non-discriminatory access

Summary of Clarifications Received IDA/MDA Positions

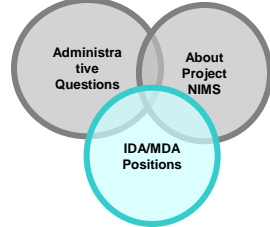


> Applicability of standards on operators



Summary of Clarifications Received

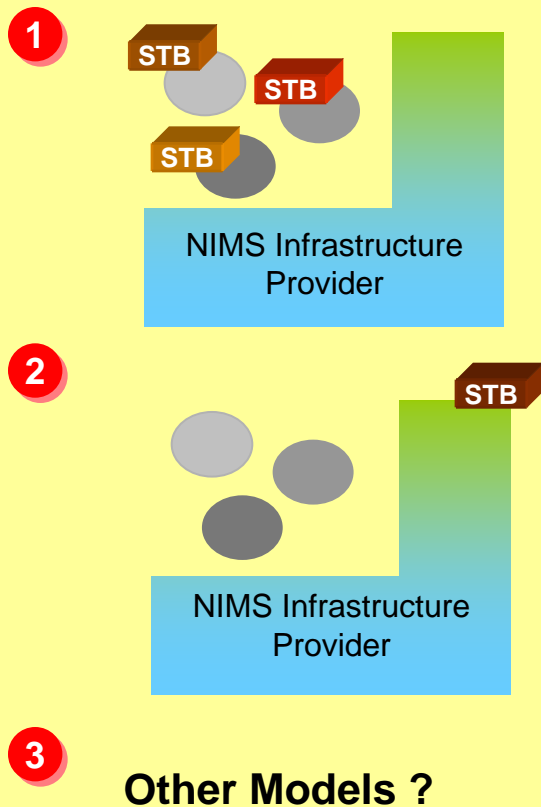
IDA/MDA Positions



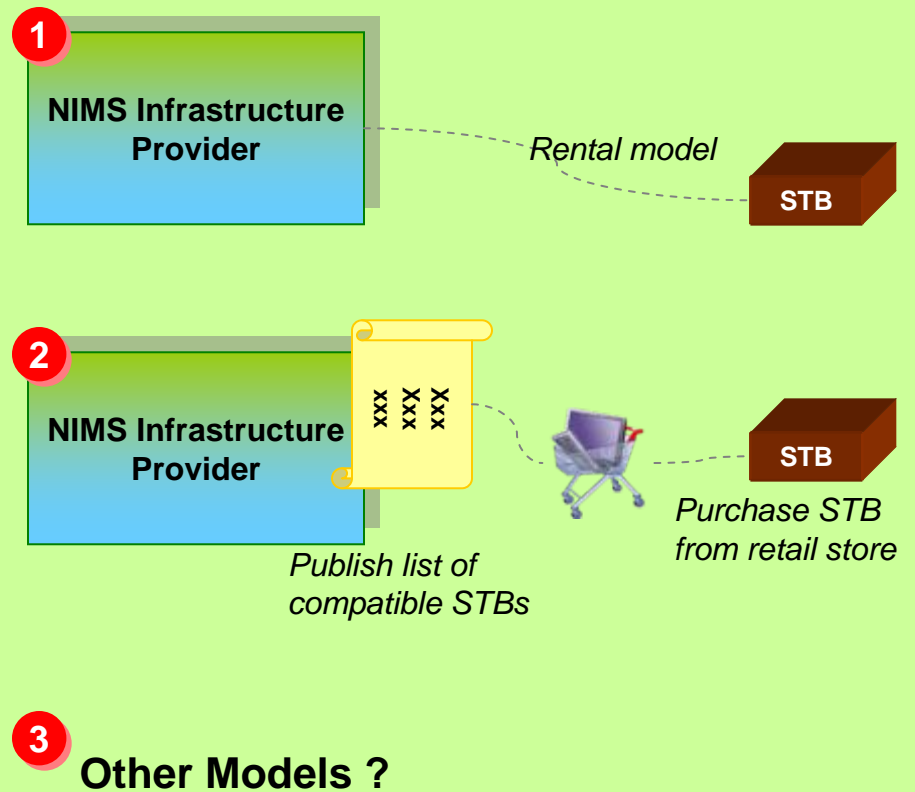
> Provision of STB

- Several possible models

Supply of STB



Acquisition of STB



Summary of Clarifications Received

IDA/MDA Positions

- > **Carriage of Free-To-Air (FTA) services by the NIMS Infrastructure Provider**
 - **Open to participants' thoughts**

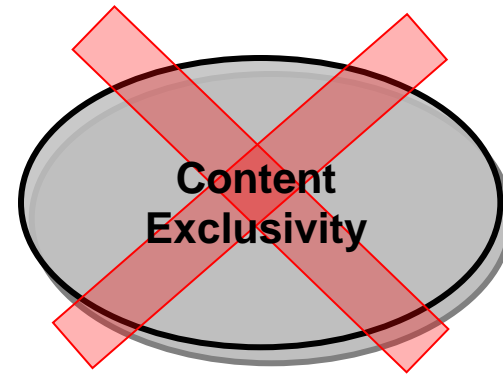
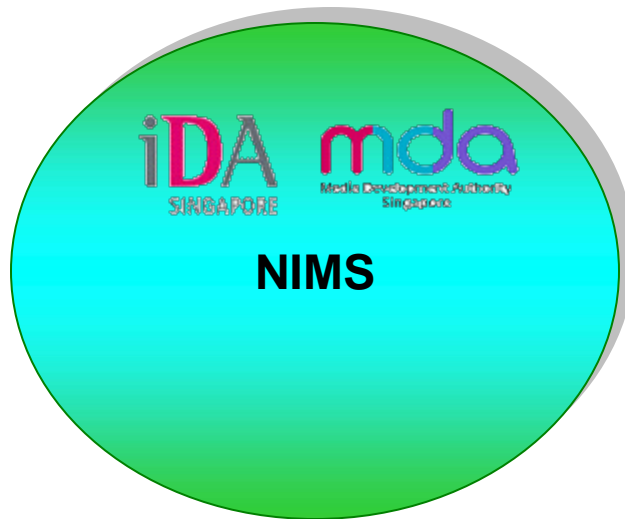


Summary of Clarifications Received

IDA/MDA Positions

> Content exclusivity

- A complex issue
- Already under study
- Will not be covered under Project NIMS



3

Next Steps for NIMS Participants

Next Steps

Submission of Responses

- > NIMS IDP1 document is available on IDA & MDA website
 - IDA - <http://www.ida.gov.sg/Infrastructure/20090807131841.aspx>
 - MDA - <http://www.mda.gov.sg/wms.www/devnpolicies.aspx?sid=152>
- > One (1) set of responses in CD, including Schedules
 - Softcopy, in MS Office and PDF formats
- > Schedules
 - Schedule A – Cover Letter
 - Schedule B – Participants' Contact Information
 - Schedule C – Roles and Responsibility of Participant
 - Schedule D – Track Enrolment Information
 - Schedule E – Details of Participating Team (*Optional*)
 - Schedule F – Additional Information by the Participant (*Optional*)

Next Steps

Submission of Responses

> Submission address

Mr Tan Kiat How

Assistant Director (Next Generation Service Provisioning)

Infocomm Development Authority of Singapore

8 Temasek Boulevard

#14-00 Suntec Tower Three

Singapore 038988

> Submission deadline

- 12 noon SGT, 9 Sept 2009 (Wednesday)

Next Steps

Post-Submission Activities

- > Invitation to participate in Track 1 and/or 2 Focus Group discussions
 - As indicated in Schedule D of submitted response
 - If you have not received invitation after submission of response, please contact broadband@ida.gov.sg

- > Diverse mix of industry players in each focus group
 - To capture inputs from different viewpoints



Post-Submission Activities

Focus Group Discussion Format

IDA and MDA to share summarized or aggregated responses

Commercial Sub-Track

- Discussion of commercial issues from responses
- Profile of attendee from participating company – Commercial team

IDA and MDA to share summarized or aggregated responses

Technical Sub-Track

- Discussion of technical issues from responses
- Profile of attendee from participating company – Technical team

½ day to 1 day discussion per focus group

Focus Group Discussion

28 Sep – 9 Oct 2009



Track 2

Commercial

Session 1

Discussion topic set 1

Group A

Group B

Session 2

Discussion topic set 2

Group A

Group B

Technical

Session 1

Group A

Group B

*Number of groups run per session will depend on number of participants registering for the particular session

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