



Living the STB-less dream



Kalev Reiljan
CTO, Elion
06.11.2013

Few facts about Estonia

Small country somewhere at the edge of Europe

With 1.35 million population

and ca. 1 million native Estonians in the world



Still developing economy

skype™ was invented and developed here



Biggest number of startups per capita in the world



Best beer in Northern Europe*

* With the exception of The Netherlands and Belgium



Most advanced and citizen-friendly e-government



Few facts about Elion

Part of  **TeliaSonera**

#1 telecom, broadband, TV and IT services provider in Estonia

3 brand in Estonia with 86% of broadband users subscribed to IPTV



300 thousand homes



30 thousand offices



1600 employees:
Top 3 place
to work in Estonia



Great customer experience:
8 out of 10 customers strongly recommend Elion services to their friends and family (B2C NPS +37)

Our story with STB-less IPTV



Autumn 2010: first thoughts about Connected TV as a STB replacement

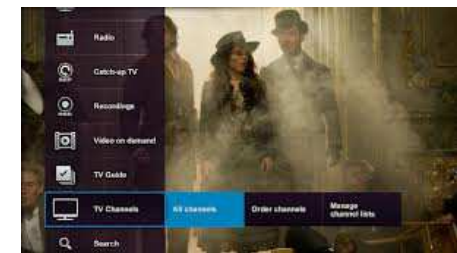


Spring 2011:
first serious contacts with
TV vendors



August 2012:
world's first launch
of STB-less IPTV

May 2012: MOU with
Samsung on
joint development
of IPTV-SmartTV
integration



November 2012: Commercial
launch of service in Estonia

6 good reasons Why ?

#1: Making it simpler and easier for our customer



#2: Brand and marketing synergies



#3: Ease of distribution



#6: Because we can ! 😊



#4: Connected TV's have already more power than STB's



#5: Getting STB out of the chain

... but the picture is not all that rosy

We lost some control over the experience/quality



Conflicting strategies between TV vendors and operators



New kind of complexity with different versions of TVs



A lot can happen in 8 years*

* Average time of TV set replacement in Estonia

What's next and key learnings

We aim to do the integration with all major vendors within next 2 years*

* Hoping that the new standardization will help us this time 😊



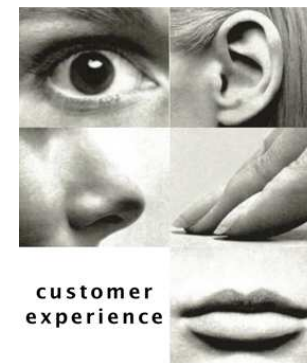
Align our strategy better with vendors



Agree maintenance and customer experience management processes and solutions/tools early on



Automated testing solution a key to manage multi-platform complexity



customer experience

Thank you!

Questions?

Kalev Reiljan
Kalev.reiljan@elion.ee
+37253022119