



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE



OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE



Established in December 1992, the European Audiovisual Observatory is a European public service organisation whose mission is to foster transparency in the European audiovisual sector and provide information services to policy makers and audiovisual professionals.

Its membership consists at present of 36 European states as well as the European Community represented by the European Commission. The Observatory functions within the legal framework of the Council of Europe and operates in collaboration with its information network: partners, correspondents and professional organisations.

The Observatory's principal areas of activity are: film, television, video/DVD, new audiovisual media services and public policy on film and television. It provides information on markets, financing and legal aspects of the audiovisual sector.

Information is made available through print publications, online services, databases and within the framework of conferences and workshops.

Créé en décembre 1992, l'Observatoire européen de l'audiovisuel est un organisme européen de service public dont la mission est d'assurer une plus grande transparence dans le secteur audiovisuel en Europe et de répondre aux besoins en informations des organes gouvernementaux ainsi que des professionnels de l'audiovisuel.

Il regroupe actuellement 36 Etats membres ainsi que la Communauté européenne représentée par la Commission européenne. L'Observatoire s'inscrit dans le cadre juridique du Conseil de l'Europe et travaille en collaboration avec des organismes partenaires, un réseau de correspondants et des organisations professionnelles du secteur.

Ses principaux champs d'activité concernent le cinéma, la télévision, la vidéo/DVD, les services audiovisuels des nouveaux médias et les politiques publiques relatives au cinéma et à la télévision. L'Observatoire fournit des services d'informations sur les marchés, les financements et le cadre juridique du secteur audiovisuel.

Les informations sont disponibles sous forme de publications, de services en ligne, de bases de données ou dans le cadre de conférences ou d'ateliers.

Die im Dezember 1992 gegründete Europäische Audiovisuelle Informationsstelle ist eine europäische Einrichtung des öffentlichen Rechts. Ihr Auftrag besteht in der Schaffung von Transparenz im europäischen audiovisuellen Sektor durch die Bereitstellung von Informationsdienstleistungen für die audiovisuelle Fachwelt.

36 europäische Staaten sowie die Europäische Gemeinschaft vertreten durch die Europäische Kommission sind zur Zeit Mitglieder der Informationsstelle. Die Informationsstelle erfüllt ihre Aufgabe im rechtlichen Rahmen des Europarates und arbeitet in engem Verbund mit Partnerorganisationen, Korrespondenten und Berufsfachverbänden.

Die Informationsstelle hat die Kernarbeitsfelder: Film, Fernsehen, Video/DVD, neue audiovisuelle Mediendienste und staatliche Maßnahmen für Film und Fernsehen. Sie stellt Informationen über Märkte sowie Finanzierung und juristische Aspekte des audiovisuellen Sektors bereit.

Die Arbeitsergebnisse stehen in Form von Printpublikationen, Online-Diensten und Datenbanken zur Verfügung und werden im Rahmen von Konferenzen und Workshops vorgestellt.

www.obs.coe.int

76, allée de la Robertsau - 67000 Strasbourg - France
Tél.: +33 (0)3 88 14 44 00 - Fax: +33 (0)3 88 14 44 19
E-mail: obs@obs.coe.int



COUNCIL OF EUROPE
CONSEIL DE L'EUROPE

Video on Demand in Europe

Second survey of VoD services as of January 2008

A report by NPA Conseil



Commissioned by the
European Audiovisual Observatory
and the
Direction du développement des médias (DDM - France)

Video on demand in Europe - Second survey of VoD services as of January 2008

*Report for the Direction du développement des médias
(DDM - France) and the European Audiovisual Observatory*

Video on Demand in Europe – Second survey of VoD Services as of January 2008

Study carried out by NPA Conseil for the Direction du développement des médias (DDM) and the European Audiovisual Observatory

ISBN 978-92-871- 6434-6

55 €

Director of publication:

Wolfgang Closs, Executive Director of the European Audiovisual Observatory

Supervising Editors:

Alexandre Joux (DDM)

Laure Kaltenbach (DDM)

André Lange (European Audiovisual Observatory)

Study carried out by:

NPA Conseil: Valérie Champetier, Deputy Director; Jean-Marie Le Guen, Analyst

Marketing:

Markus Booms (European Audiovisual Observatory)

markus.booms@coe.int

Editorial assistants:

Nathalie Schneider, Valérie Haessig (European Audiovisual Observatory)

Publisher:

European Audiovisual Observatory

76, Allée de la Robertsau

F – 67000 Strasbourg

Tel.: +33 (0)3 88 14 44 00

Fax: +33(0)3 88 14 44 19

E-mail: obs@obs.coe.int - URL: <http://www.obs.coe.int>

The analyses made in this study are the authors' own opinions and cannot in any way be considered as representing the views of the Direction du développement des médias, the European Audiovisual Observatory, its members or of the Council of Europe.

© Direction du développement des médias and European Audiovisual Observatory, April 2008

TABLE OF CONTENTS

1. EXECUTIVE SUMMARY	1
2. CONTEXT OF THE STUDY AND METHODOLOGY.....	2
2.1 REMINDER OF CONTEXT OF THE STUDY	2
2.2 METHODOLOGY.....	4
3. LIST OF VoD SERVICES	4
4. SUMMARY OF CHANGES IN THE VoD MARKET	7
4.1 INVENTORY OF VoD SERVICES BY DISTRIBUTION MEDIUM	7
4.1.1 Internet – the distribution medium for most VoD services, particularly new offers of catch-up tv	7
4.1.2 VoD is becoming an inseparable element of the multi-service offers of IPTV operators	10
4.1.3 Cable will offer solid advantages once its networks have gone digital.....	12
4.1.4 Handicapped by having no return channel on their networks, operators of satellite and terrestrially-broadcast television offers could invest in convergent boxes.....	13
4.2. THE VARIOUS TYPES OF PLAYER ACTIVE IN THE VoD MARKET	14
4.2.1. IPTV operators are still the most dynamic distributors	15
4.2.2 Television channels benefit from the surge in catch-up TV	16
4.2.3 Other editors of VoD services – an ever-increasing number of very varied players.....	17
4.2.4 New players/intermediaries are appearing in the job chain: price comparers and video search solutions	22
4.3 INVENTORY OF DEVELOPMENTS IN VoD SERVICES CONCERNING EDITORIAL OFFER.....	22
4.3.1 Increasing number of feature films available, though as yet few are exclusive	22
4.3.2 Television content making strong progress, with the emergence of offers of catch-up TV	23
4.4 INVENTORY OF DEVELOPMENTS IN VoD SERVICES IN TERMS OF ECONOMIC MODELS.....	24
4.4.1 Rental models still dominant, and supported by the emergence of SVoD	24
4.4.2 FoD and insertion of contextual advertising – strong trends for the near future	26
APPENDIX: List of VoD services by country.....	31

1. EXECUTIVE SUMMARY

258 VoD services have been identified in the 24 European countries included in our study.

France, the Netherlands and Germany are, as in 2006, the leading countries in terms of offers.

More than 70% of the services are at least present on the Internet, which constitutes the prime distribution medium for VoD offers. It is on the Internet more particularly that broadcasters are developing catch-up TV services – these were one of the main evolutions concerning offers this year.

Those broadcasters that were previously poorly positioned or not particularly present in the VoD market are now offering attractive and highly differentiated services. In their wake, the other VoD platforms, originally more firmly based on a catalogue of cinema films, are opening up considerably to TV content.

Distributors, particularly IPTV operators, nevertheless remain the players most involved in supplying VoD offers. It is on their networks that consumption is most sustained, for example in France, where 80% of content is viewed via IPTV, compared with 20% via offers available on the Internet.

In 2007 the video share sites (such as DailyMotion and YouTube) laid down markers for the supply of VoD services for professional content (as opposed to UGC [user-generated content]). For these services, as for global VoD offers for which no charge is made, such as Joost, access to quality content is however of prime importance in being able to compete with the offers made by domestic players.

The emergence of catch-up TV offers and the influence of the video share sites helped to introduce the FoD model for marketing video content (FoD = Free on Demand, where content, financed by advertising, is offered to the viewer/Internet user free of charge). Together with SVoD, this appears to be one of the most popular models for future use by European providers of services.

2. CONTEXT OF THE STUDY AND METHODOLOGY

2.1 REMINDER OF CONTEXT OF THE STUDY

The Directorate for the Development of the Media (DDM) and the European Audiovisual Observatory wished to have an analysis of the offer of VoD programmes and markets in Europe.

A first study on VoD in Europe was carried out in 2006 by consulting company NPA Conseil and published in early 2007 by the Directorate for Media Development (DDM) and the European Audiovisual Observatory¹.

The present document is an attempt to draw up a general description of the European VoD landscape, updated to the end of 2007.

To achieve this, a survey of European VoD services was carried out and is presented here in the form of summary tables.

The structural changes in the distribution networks, the types of players involved, and the editorial offers and economic models observed in 2007 have been analysed in a separate section.

Lastly, it is important to note that the range of the services taken into account in this survey is broader than last year – the work undertaken this year incorporates many catch-up TV offers for which no charge is made that have started up in recent months. Last year, only VoD services for which a charge was made were included in the perimeter of the study.

This study again covers 24 European countries, all members of the European Audiovisual Observatory; some are also members of the European Union. The table below shows this in detail.

¹ http://www.obs.coe.int/oea_publ/market/vod.html

Table 1: Presentation of countries included in the study

	Member of the European Audiovisual Observatory	Member of the EU	Candidate for membership of the EU
AT - Austria	X	X	
BE - Belgium	X	X	
CH - Switzerland	X		
CY - Cyprus	X	X	
DE - Germany	X	X	
DK - Denmark	X	X	
EE - Estonia	X	X	
ES - Spain	X	X	
FI - Finland	X	X	
FR - France	X	X	
GB - United Kingdom	X	X	
HU - Hungary	X	X	
IE - Ireland	X	X	
IS - Iceland	X		
IT - Italy	X	X	
LU - G.D. Luxembourg	X	X	
NL - Netherlands	X	X	
NO - Norway	X		
PL - Poland	X	X	
PT - Portugal	X	X	
SE - Sweden	X	X	
SL - Slovenia	X	X	
SK - Slovakia	X	X	
TR - Turkey	X		X

Source: NPA Conseil

2.2 METHODOLOGY

To carry out this second survey, NPA Conseil made use of its network of partners and contacts in France and elsewhere, and the tools it has developed in-house for monitoring and tracing VoD services.

NPA Conseil limited its monitoring of catch-up TV services for which no charge is made to the developments concerning the main television broadcasters in each market studied, leaving aside the offers of less well-known players.

3. LIST OF VOD SERVICES

At the end of December 2007, 258 VoD services were listed in the 24 countries included in the study, compared with 142 services at the end of 2006. Using a "constant parameter", i.e. disregarding the 58 catch-up TV services for which no charge is made² included in the total number of offers listed in 2007, 58 new VoD services, i.e. 200 services excluding catch-up TV for which no charge is made, emerged in the course of 2007.

² In all, 62 catch-up TV services were recorded; 4 were pay schemes operated by editors of the Belgian television channels VMM, VRT, RTL and SBS, which were included in the previous study.

Table 2: Summary of number of VoD services in Europe at the end of 2007

	Country	Total number of services (1)	Growth in total number over one year	Internet	IPTV	Cable	Sat.	Terr.-broadcast digital TV	Total (2)
20 +	France	32	+12	26	13	1			40
	Netherlands	30	+11	27	3	1			31
	Germany	26	+14	20	4	2	2		28
10 - 20	Sweden	16	+8	11	5				16
	United Kingdom	16	+3	11	4	4	1	1	21
	Norway	14	+7	11	4	1			16
	Spain	15	+9	12	3	1			16
	Italy	12	+4	9	4				13
	Denmark	11	+4	8	3	3			14
	Belgium	10	+0	3	5	6			14
	Austria	10	+5	8	1		1		10
5 - 10	Switzerland	9	+6	7	1	1			9
	Hungary	8	+4	6	2				8
	Finland	8	+4	7	2	1			10
	Ireland	7	+2	5	2		1		8
	Poland	6	+3	2	2	2	2		8
	Portugal	6	+4	3	2	1	1		7
	Slovakia	5	+4	4	1				5
1 - 4	Estonia	4	+2	2	1	1			4
	Iceland	4	+3	4	1	1			6
	Slovenia	4	+4	2	2				4
	Cyprus	2	+0		2				2
	Turkey	1	+1	1					1
	G.D. Luxembourg	2	+2	2					2
		Total	258	+116	191	67	26	8	1

Source: NPA Conseil

(1) The same service available on various media is only counted once in the total.

(2) The same service available on various media is counted in the total as many times as it is available. The total corresponds, in a way, to a number of access points for VoD services.

With 32 services, France is still the country with the largest offer, followed by the Netherlands (30 services) and Germany (26 services). These three countries, which were already leading the field in 2006, account for almost one-third of all European services.

The other notable feature is the presence of VoD services in all 24 countries. This is, however, the result of the change in the perimeter of the study; the Grand Duchy of Luxembourg, for example, is "rescued" by RTL's catch-up TV service, which was not taken into account in the 2006 study.

It is also interesting to note on which media the main changes have taken place. It comes as no surprise that it is the Internet that has fuelled the growth in VoD services in 2007 and that “benefits” from the change in the study’s perimeter – for example, catch-up TV for which no charge is made is mainly offered on this medium, as we shall see later.

Table 3: Summary of growth by distribution network in the number of VoD services in Europe in 2007

Country	Total number of services (1)	Internet	IPTV	Cable	Sat.	Terr.-broadcast digital TV	Total (2)
Austria	+5	+5					+5
Belgium	+0	+0		+1			+1
Cyprus	+0						+0
Denmark	+4	+4	+2	+2			+8
Estonia	+2	+1		+1			+2
Finland	+4		+1	+1			+2
France	+12	+11	+5	+1			+17
G.D. Luxembourg	+2	+2	+0				+2
Germany	+14	+11		+2			+13
Hungary	+4	+4					+4
Iceland	+3	+4		+1			+5
Ireland	+2	+0	+2				+2
Italy	+4	+4	+1				+5
Netherlands	+11	+10	+1	+1			+12
Norway	+7	+5	+2	+1			+8
Poland	+3		+0	+2	+1		+3
Portugal	+4	+3	+1		+1		+5
Slovakia	+4	+3	+1				+4
Slovenia	+4	+2	+2				+4
Spain	+9	+10					+10
Sweden	+8	+5					+5
Switzerland	+6	+5		+1			+6
Turkey	+1	+1					+1
United Kingdom	+3	+5	+1	+1			+7
Total	+116	+97	+20	+15	+2		+134

Source: NPA Conseil

(1) The same service available on various networks is only counted once in the total.

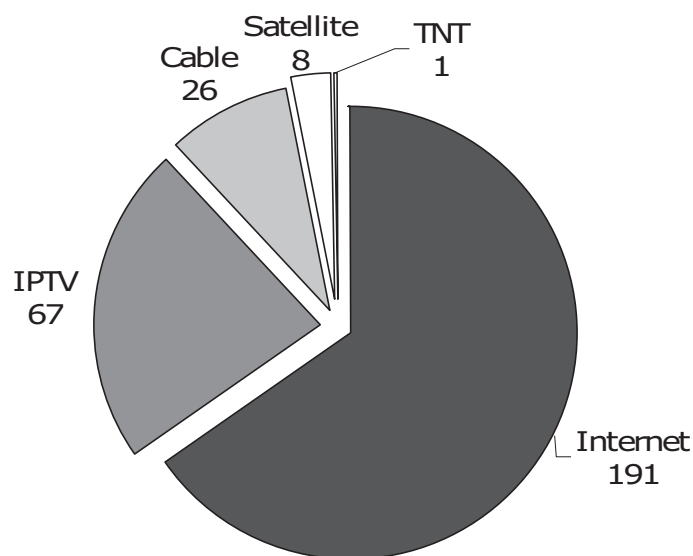
(2) The same service available on various networks is counted in the total as many times as it is available. The total corresponds, in a way, to a number of access points for VoD services.

4. SUMMARY OF CHANGES IN THE VOD MARKET

4.1 INVENTORY OF VoD SERVICES BY DISTRIBUTION MEDIUM

Listing the services on offer confirms that the Internet is the premier medium for the distribution of VoD, carrying almost two-thirds of the offers available. It is followed by the broadband networks (IPTV), with almost one-quarter of the services, and cable, satellite and terrestrially-broadcast digital, in the same order as last year.

Diagram 1: Breakdown of VoD services by medium



Source: NPA Conseil

This should be taken to mean that 191 services are distributed by Internet, 67 by IPTV (some of which may be the same as those distributed on the Internet), 26 by cable (again, not exclusively), etc.

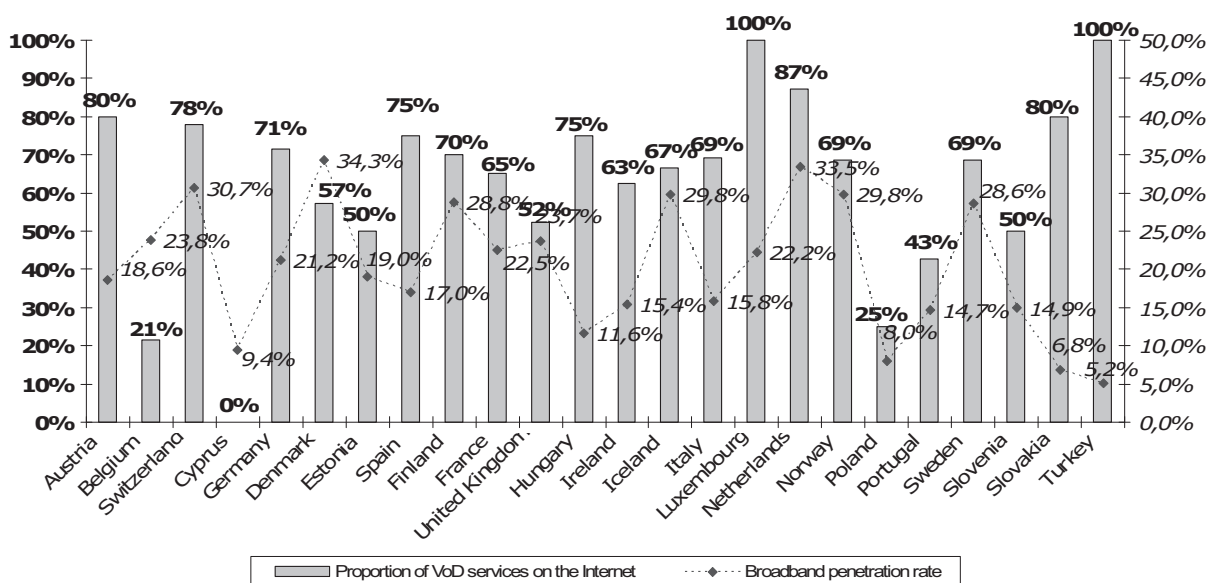
4.1.1 Internet – the distribution medium for most VoD services, particularly new offers of catch-up tv

The number of VoD services on the Internet continued to increase substantially, with 97 new services. At the end of December 2007, 72% of all the services considered were distributed on the Internet.

Logically, those countries where the level of penetration of broadband Internet is high generally have a substantial offer of services on the Internet. This is the case of the Scandinavian countries, the Netherlands and Switzerland, as well as France and Germany. Belgium, which initially seemed to be favouring VoD offers on cable

networks and broadband, and the Grand Duchy of Luxembourg, where the global offer of VoD is still in its infancy, are nevertheless exceptions. In the United Kingdom, only 60% of the VoD offer is distributed on the Internet; this is due to the fact that this country has a greater variety of vectors and networks in a position to host offers (terrestrially-broadcast digital network, cable network, IPTV) than most other countries.

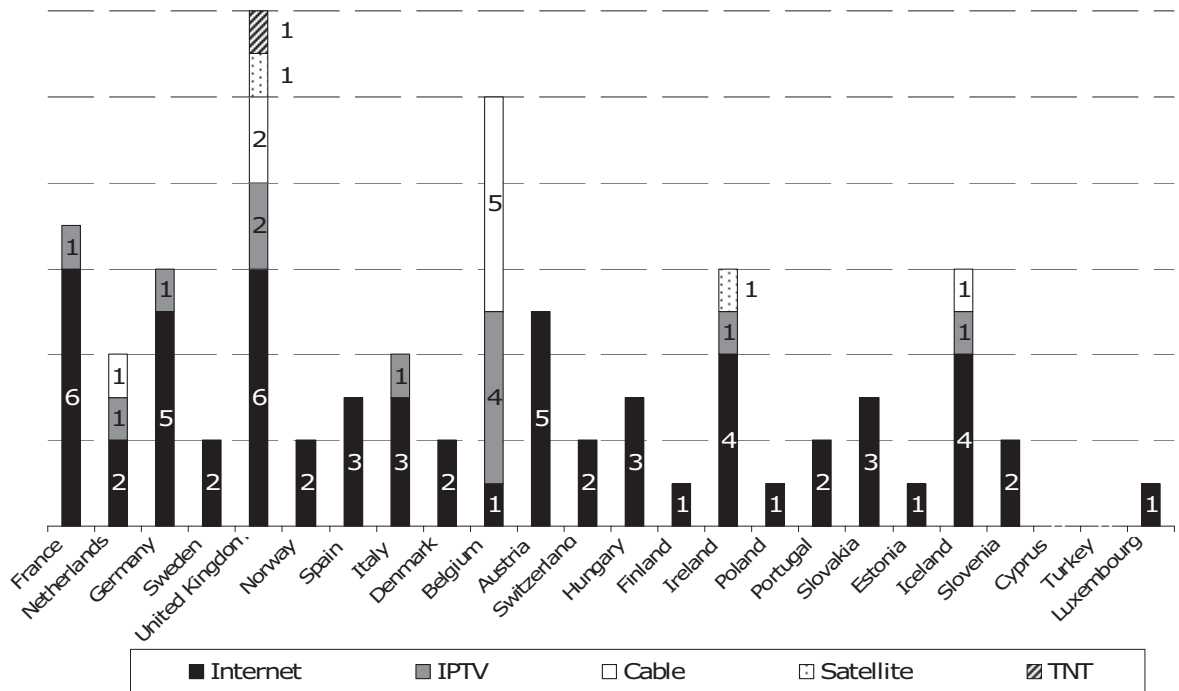
Diagram 2: Proportion of VoD services on the Internet and penetration of broadband Internet



Source: NPA Conseil, OECD (June 2007) for overall broadband Internet penetration rate for all the countries excluding Cyprus, Estonia and Slovenia; ECTA (March 2007) for Cyprus, Estonia and Slovenia

The strong progress in the number of VoD services on the Internet is the result of the increase in the number of offers of catch-up TV on the part of channel broadcasters, which have multiplied in the past two years; most are distributed on this network. Thus in Europe the Internet distributes 62 catch-up TV services, compared with 11 for IPTV, 8 for cable, 2 for satellite, and 1 for terrestrially-broadcast digital TV.

Diagram 3: Breakdown by medium of offers of catch-up TV



Source: NPA Conseil

Although the catch-up TV on offer was initially available mainly on the Internet, cable and IPTV operators are also starting to offer these services on their networks.

In Great Britain, for example, the various operators were jostling to list the BBC's first offer (BBC iPlayer). In addition, the 4oD service offered by Channel 4, Britain's commercial public-sector channel, is also available on IPTV environments (BT Vision, Tiscali TV) and on cable (Virgin Media) around the country.

In France, France Telecom/Orange concluded an exclusive multi-annual agreement with the public-sector broadcaster France Télévisions under which the latter makes available all its non-cinema programmes on a dedicated service, called Rewind TV. The agreement also covers the group's news programmes, but this is not exclusive.

The principle of Rewind TV is to be taken up on other markets where Orange is present, starting with the United Kingdom.

Mention should be made of the specific case of Belgium, where the catch-up TV services of the broadcasters (VRT, RTL, RTBF, VMT, SBS, etc) were first offered by the IPTV operator Belgacom and the cable operator Telenet. They are only starting to migrate towards the Internet (only VMM's iWatch offer is currently available to Internet users).

4.1.2 VoD is becoming an inseparable element of the multi-service offers of IPTV operators

67 VoD services on IPTV were listed at the end of 2007 among the services offered by telecom operators, i.e. 27% of the total offer. 20 new VoD services were taken up or launched on the broadband networks in the course of the year.

Two reasons may be put forward to explain the large number of VoD services included in IPTV offers.

Firstly, VoD has become an indispensable element within the multi-service offers of the telecom operators. All the main IPTV operators, in fact, offer something.

Table 4: Main offers of IPTV in Europe

Operator	Group	Country of operation	IPTV offer	No. of IPTV subscribers	VoD offer(s)
Free	Iliad	France	Freebox	2 169 000*	Free Home Video, CanalPlay, TF1 Vision, etc
Orange	France Telecom	France	Orange TV	837 000	24/24 Video
Neuf	Neuf Cegetel	France	Neuf TV HD	600 000	Neuf VoD
Telefonica	Telefonica	Spain	Imagenio	451 000	Imagenio Videoclub
Fastweb	Swisscom	Italy	TV di Fastweb	260 000	Video on Demand via Fastweb TV, Replaytv, Ontv, Rai Click, etc
Belgacom	Belgacom	Belgium	Belgacom TV	191 000	Belgacom TV à la demande, Net Gemist, iWatch, RTL à la carte, etc
Teliasonera	Teliasonera	Sweden	Telia Digital TV	160 000	Telia Video on Demand
Alice	Telecom Italia	France	Alice Box	59 000	Mes videos à la carte
Swisscom	Swisscom	Switzerland	Bluewin TV	50 000	Teleclub on demand
Alice	Telecom Italia	Italy	Alice Home TV	50 000	Alice Home TV Video on Demand
Tiscali	Tiscali	United Kingdom	Tiscali TV (formerly Homechoice)	50 000	Tiscali Movies, 4oD, Kids Mix, etc
O2	Telefonica	Czech Republic	O2 TV	40 000*	Videotéka
KPN	KPN	Netherlands	Mine	26 000	Film Direct
BT	BT	United Kingdom	BT Vision	20 000*	Films on Demand, TV on Demand, Kids TV on Demand, etc
T-Online	Deutsche Telekom	Germany	T-Home	10 000	Entertain Online-Videothek

Source: NPA Conseil. Data at June 2007 unless marked *. Figures provided by the companies, except Free, Fastweb, Telia, Thome, Alice Home TV, Tiscali TV (NPA Conseil estimates).

* Free does not publish any figures for its IPTV subscribers. By default, unbundled Free subscribers (78.4% of its 2 767 000 subscribers at the end of September 2007) subscribe to a triple-play offer and are therefore considered as potential users of IPTV, although it is

*impossible to say how many of them actually could and do use the service. This is the broadest definition of "eligible" subscribers, and it is used by ARCEP (French telecom regulatory authority) for its observation of the market for telecom services. At 30 September 2007 there were about 1.28 million Free subscribers with an HD Freebox (46.3% of 2.77 million).
** For BT and O2 TV, company figures at August 2007.*

Secondly, the number of VoD services within a single offer is tending to increase. Generally speaking, the services present on the Internet try to get themselves included in the offers for IPTV operators, as these are viewed on a television set. This is an important factor for these services because this is where consumption is highest (compared with viewing on a computer screen).

In France, according to NPA Conseil estimates, 80% of VoD content is watched on a television screen via the offers of IPTV operators, even though they offer no more than 45% of all the VoD services available in the country.

France, where IPTV offers have the highest number of subscribers³ in Europe, with an advanced process for taking up third-party VoD services within the same offer, is logically the country where the offer of VoD on broadband is the most significant. Orange, Free, Neuf, Alice, Darty and Club Internet⁴ – i.e. 6 of the 7 significant operators on the French market offer VoD (only Tele 2 does not). In all, 13 VoD services (the operators' own services plus the third-party services included in their offers) are distributed by these six IPTV offers in France.

Behind France, Sweden and Belgium, with five services offered using IPTV, are the countries with the most extensive VoD offer on this network. In Sweden, this is because of the large number of IPTV operators with a VoD offer, whereas in Belgium, the figure is due to the efforts of the operator Belgacom which, in addition to its own offer of films, also makes available the catch-up TV services of the four Belgian broadcasters (VRT, VMM, RTL, RTBF).

³ At the end of June 2007, according to ARCEP, France had 3.8 million subscribers "eligible" for a broadband TV service.

⁴ Club Internet/T-Online France (Deutsche Telekom group), bought by the Neuf Cegetel group in May 2007, officially ceased to exist on 2 January 2008. Up to that date and since June 2006, the Internet access provider was operating an IPTV offer and VoD.

4.1.3 Cable will offer solid advantages once its networks have gone digital

11% of all VoD services in Europe are distributed by cable, which thus remains a minor vector for the distribution of VoD.

Two explanations may be put forward – one is based on technology, and the other on arithmetic.

From a technological point of view, most of the cable networks in Europe are currently going digital and they are therefore not yet in a position to offer services that include VoD (since this requires a return channel from the subscriber to the operator, which does not exist). As a result, the cable operators are still, for the time being, working on the basis of Near-VoD offers (a film is broadcast a number of times in the course of the day, at close intervals) rather than VoD.

Secondly, from an arithmetical point of view, the concentration process for the cable market in Europe has been intense in recent years, drastically reducing the number of operators surrounding the national champions. Thus in the United Kingdom, France and Spain, there is only one significant cable operator. Even in Germany, the market is becoming rationalised around two major operators (Kabel Deutschland and Unity Media), although there are still many local and regional operators.

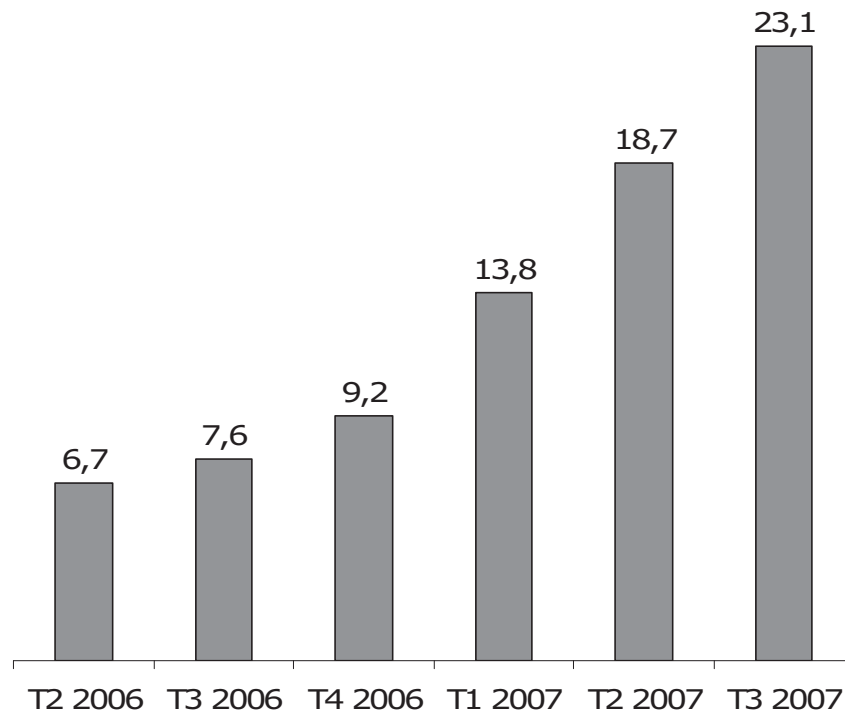
There are at present, in most European countries, fewer cable operators in Europe than IPTV operators, and as a result fewer offers capable of offering VoD services.

It should be noted that these concentrations allow action to be taken on the technological backwardness noted on this first point since the operators, once they have a monopoly position on their cable market, invest substantially in upgrading their networks in order to be able to compete with the other distributors of pay television (satellite and broadband) in supplying innovative services such as VoD.

It should also be noted that in those countries where cable networks have already gone digital or are well on the way to doing so, VoD services on cable seem to be fully competitive.

Thus Virgin Media is a major player on the VoD scene in the United Kingdom. In the third quarter of 2007, its service generated 23 million consultations per month on average, almost three times as many as during the same period the previous year.

Diagram 4: Progress in monthly viewings of VoD content (in million) on the Virgin Media service



Source: Virgin Media / NPA Conseil

In addition, a growing number of subscribers use this service: the proportion of Virgin Media clients using VoD increased from 36% at the beginning of 2007 to 45% in the third quarter of 2007. Lastly, users make more use of the service: they used the service 17 times per month in the third quarter of 2007, compared with 10 times per month at the start of the year.

4.1.4 Handicapped by having no return channel on their networks, operators of satellite and terrestrially-broadcast television offers could invest in convergent boxes

VoD offers via satellite are still less important than the other distribution media. At the end of 2007, satellite was distributing less than 4% of Europe's VoD services. There is only one offer using terrestrially-broadcast digital television – Top Up TV in the United Kingdom.

The operators offering satellite and terrestrially-broadcast digital television suffer from the lack of a return channel on their networks, and are obliged to propose push-to-

PVR offers, for which the catalogue (which depends on the capacity of the PVR) is generally speaking slim compared with market standards.

This does not, however, prevent the operators from launching offers of this type: Canal Digitaal is due to set up a push-to-PVR offer in the Netherlands and Belgium in 2008⁵. This will follow BSkyB in Great Britain and Ireland, Premiere in Germany and Austria, and Cyfra+ and N in Poland.

On the whole, these offers suffer from comparison with the VoD offers of the broadband and cable operators with which they compete, and the various operators could well change their strategy and focus their development of VoD on offers on the Internet, which they would converge onto the subscriber's television screen. This could be done using a convergent box fitted at the subscriber's home and connected to the Internet.

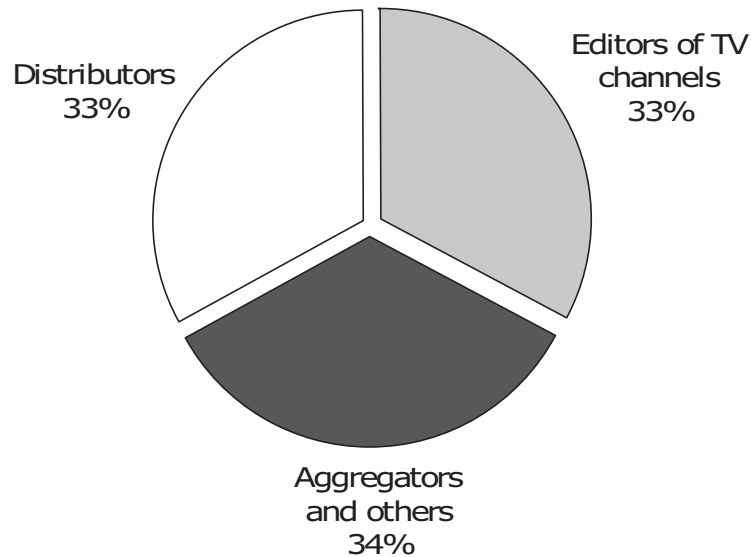
4.2. THE VARIOUS TYPES OF PLAYER ACTIVE IN THE VoD MARKET

The listing of VoD services places the three types of player at practically the same level, with one-third of the services each. Distributors of service operators on IPTV, cable, satellite and terrestrially-broadcast digital television are slightly ahead of "aggregators and others"⁶ and the broadcasters which, because of the growing importance of catch-up TV offers, now occupy a firm position as unavoidable players in the VoD market.

⁵ http://www.broadbandtvnews.com/resources/archive_uk/140907.html

⁶ Category comprising aggregators and other rightsholders, and parties taking up the formers' unbranded offers.

Diagram 5: Breakdown of VoD services by type of player



Source: NPA Conseil

4.2.1. IPTV operators are still the most dynamic distributors

In keeping with the above analysis of services by distribution medium, the telecom operators represent about 80% of the distributors' offers. The remaining 20% are divided among the cable operators and the pay television operators using satellite or a terrestrially-broadcast digital signal.

Moreover, whereas the IPTV operators (except incumbent groups such as Deutsche Telekom and France Telecom) originally included in their VoD offers content and services aggregated and edited by third parties, they are now tending to supply their own services, negotiating directly with the economic beneficiaries.

This is the method adopted by the French operator Free. Having aggregated the offers of the Canal Plus Group (CanalPlay), TF1 (TF1 Vision), M6 (M6 Video), etc, it is now adding its own services (the Free Home Video SVoD service), after negotiating the VoD rights directly with Warner and Disney-ABC International Television.

For its part, France Telecom/Orange set up a cinematographic production subsidiary, Studio 37, in the spring of 2007 to enable it to ensure access to an owner's catalogue and supply its own services, even on a marginal level. Its first film is due to be

screened in cinemas in February 2008. Studio 37 has apparently already signed about fifteen co-production contracts since its creation.

4.2.2 Television channels benefit from the surge in catch-up TV

Whereas they were not initially the best-placed players in the VoD market, broadcasters now play a predominant role with the arrival of catch-up TV. In Europe, 61 offers of catch-up TV were recorded, and this constitutes the real preserve of the broadcasters [although the telecom operators are also trying to make their mark on the market (see paragraph 4.2)].

The offers of catch-up TV have the advantage of offering content that is readily identifiable and constitutes strong loss leaders: everyone knows which channel broadcasts his or her favourite programme, and therefore by extension which VoD or catch-up TV service to use (very different from the situation for feature films, where there is always the question of which service to use).

Indeed some groups are currently focusing on supplying television programmes and leaving cinema content aside.

This is the case of the RTL Group, which uses its various European channels to edit VoD services that are mainly based on catch-up TV:

RTL Now and Vox Now in Germany only offer the series and programmes broadcast on the channel, and do not include cinema films;

M6 Video in France has an offer that focuses mainly on the television channel's programmes and only includes cinema films to a marginal extent;

Fivedownload, edited by Five in the United Kingdom, concentrates on American series broadcast on the channel that can also be viewed on the Internet and catch-up TV;

the exception is RTL in the Netherlands, which edits not only a catch-up TV offer (RTL Gemist) but also, separately, a cinema offer (RTL Video).

Among recent developments, mention should, lastly, be made of two services announced in 2007 which attract attention – Hulu, the catch-up TV and films service of Fox and NBC Universal, and the BBC's probable commercial catch-up TV offer. Both are aiming at a worldwide audience.

Hulu is a joint venture between the networks/studios Fox and NBC Universal, currently being tested in the United States. On the catch-up TV principle, Hulu provides access

to content from the catalogues of Fox, NBC Universal, Sony, MGM and about fifteen cable channels such as Bravo, E!, FX, SciFi and Sundance. The television content, more specifically, is accessible on the service from the evening of broadcasting and stays on-line for about five weeks.

The economic model for the service is based on advertising which will be inserted, as appropriate, in the form of banners next to the video, overlay advertisements, billboards at the start and finish of the video, or, for longer-format content, commercial breaks in the programme.

Its development is of particular interest for the European market, since once it has gone on-line on the American market it could be launched in the United Kingdom.

The BBC announced that in early 2008, through its subsidiary BBC Worldwide, it would be launching a pay VoD offer aimed at viewers outside the United Kingdom. The offer would be associated with the free UK catch-up TV service iPlayer. Specifically, the programmes broadcast on the group's channels will be accessible free of charge to the UK public on iPlayer for seven days following broadcasting, and then subsequently on a pay basis on BBC Worldwide's VoD offer.

4.2.3 Other editors of VoD services – an ever-increasing number of very varied players

Three categories of players, whose developments are being closely observed, could take a more important part in 2008 in the structuring of the VoD market – the studios, the equipment manufacturers, and the global VoD services for which no charge is made.

The studios form the cornerstone of the VoD cinema offer. It is they that, by opening their catalogues, ensure that the offer has depth and a power of attraction. They are also at the crossing point of two strategies and have to decide whether to merely provide or edit an offer as well.

Most of the major studios and producers in Europe are currently acting as content suppliers. The failure of Movielink in the United States, the major American studios' joint VoD offer on the Internet, is certainly one of the reasons for this.

Movielink was created in 2002, with the backing of most of the major American studios (Metro-Goldwyn-Mayer Studios, Paramount Pictures, Sony Pictures Entertainment, Universal Studios and Warner Bros. Studios).

After investing more than \$148 million⁷ in five years without achieving profitability, the studios decided to sell the service in the summer of 2007 to the DVD rental company Blockbuster, for less than \$20 million, according to the Wall Street Journal. In 2006, the service had generated turnover of \$4 million and losses of \$22 million.

In Europe, there are few examples worth noting of significant offers edited by producers.

In France, the producer, distributor and operator MK2 launched a VoD offer in the spring of 2007, concentrating on demanding films. To accompany its offer, the group also put a community site, Onowa, on-line, on which Internet users can upload their quality creations (promising a variety of high-quality YouTube), and on which the VoD platform is also accessible.

In Germany, Warner joined up with Arvato Mobile (Bertelsmann) on the In2Movies platform, launched in April 2006, but the offer is having difficulty finding its audience. At the European level, the studio would appear now to be focusing on supplying its own VoD packages to the various platforms. It launched the Warner TV service in the United Kingdom on the Virgin Media and BT Vision offers in this way. The studio would like to develop the model on other markets.

Thus, rather than putting their own offers on the market, the studios could focus on supplying the various VoD offers on the market with mini-services in their name.

Offers involving equipment manufacturers constitute a strong trend. There appear to be two main models – VoD offers using dedicated (stand-alone) boxes, and those using terminals already installed in the home for other uses.

Offers of VoD using dedicated boxes are very little developed on the European market, and in some countries not at all, although they are present on the American market. In 2007, two terminals for bringing VoD content to the television screen were heavily reported in the press: Vudu and Apple TV.

These initiatives nevertheless follow on from the failure of similar offers, such as MovieBeam and Akimbo, and in fact they appear to be taking the same route. Steve Jobs has acknowledged that Apple TV was a failure and that the convergence offered

⁷ <http://www.secinfo.com/d14D5a.u6rdb.c.htm>

by the terminal – making it possible to watch videos from iTunes Store⁸ on a television screen – had not been convincing.

The main reason for this is simple – not many people want to install yet another box next to their television set. Some of the many terminals already there allow access to VoD services, such as boxes for IPTV, cable and satellite, and even digital TV, as well as game consoles.

While a VoD offer using a dedicated (stand-alone) box seems to be doomed to failure, adding VoD services to the boxes already installed in the home (satellite PVR, digital TV box, game consoles, etc) appears to be a more virtuous model.

The suppliers of game consoles in particular are beginning to incorporate VoD services. Thus in the United States in November 2006, Microsoft launched the Xbox Video Marketplace VoD offer allowing gamers access to content from Paramount Pictures, CBS, TBS, MTV Networks, UFC, NBC, ESPN and Warner Bros.

A similar offer was launched in Great Britain, Ireland, France and Germany in December 2007. At present, however, Xbox fans only have access to a relatively limited catalogue (about 35 titles in France, for example).

Sony is likely to be falling into line soon with its upcoming launch of a similar offer in Japan, to be accessible using its PS3 and PSP consoles. In Europe, Sony has concluded an agreement with BSkyB to take up its VoD offer on the PSP. The service should roll out in 2008.

Only Nintendo, which produces the Wii, the third major console on the market, apparently does not have any plans for VoD up its sleeve.

Finally, mention should be made of the mobile multimedia manufacturer Archos, which has multiplied its advertising for VoD. Initially it signed agreements with various platforms (CanalPlay, Fnac.com, Vodeo.tv, TF1 Vision, INA, CinemaNow, Arts Alliance Media, etc) to make their content accessible via the Archos Content Portal for users of its fifth-generation WiFi terminals. This gives them the possibility of watching quality video content while on the move.

⁸ Apple entered the VoD market in the United States in October 2005 and in the United Kingdom at the end of August 2007.

In November 2007, the group announced that it could offer more than 5 000 titles (films and documentaries) on an international scale, and that it has convinced more than 100 000 users.

Also in November, Archos announced the launch of a new offer combining a terminal and video content in subscription form – the Archos Media Club. For €19.99, the subscriber is entitled during two years (the minimum subscription period) to a 4 Go Archos 605 WiFi personal stereo, a fifth-generation DVR station to connect the mobile terminal to the television set, and two films per month viewable during a 48-hour period, accessible from a base of 300 films. Subscribers wishing to watch more than two films a month will have to pay, at a unit price of between €4.99 and €5.99.

Lastly, another category of players is beginning to appear on the professional VoD market – global VoD services for which no charge is made. Some of these already exist (Joost) or are on their way up (YouTube, DailyMotion, etc); it is possible that in the near future they will compete with the various domestic offers in Europe.

These services have to convince the economic beneficiaries in the various geographical markets to let them use a quality catalogue, which they have not yet managed to do. Although Joost concluded agreements on content with Viacom, CNN, Warner Music and Endemol, for example, its offer still tends to heavily favour content in English and sport and music content. For its part, Babelgum relies on independent and alternative content.

Video share sites also find it difficult to gain access to high-quality content. They have however recently embarked on a process of change. Confirmation of the arrival of video share platforms in the quality VoD preserve has been, at any event, one of the most notable elements in recent months. In this way YouTube, DailyMotion, Metacafe and Stage 6 have clearly signalled their intention to distribute quality content on a legal basis (UGC and/or professional content), in order to be able to tap into some of the manna that the income from the advertising market for on-line video represents.

They have solid points in their favour for becoming reference VoD platforms. They already attract considerable audiences to their services, own brand names that are recognised internationally, and already constitute a place for Internet users to consume quality video content (many films and series and sport content are put on-line on these platforms), whether the content is there lawfully or not.

For some months, the video share services have been forcing themselves, with more or less speed, to effect two major changes in order to be able to affirm themselves as credible VoD services:

- Eradicating the unlawful content present on their sites:
 - by installing filter solutions,
 - and/or multiplying income-sharing agreements with the various economic beneficiaries whose content is present on the platform;
- Making the best of this content available to the user and to advertisers by:
 - income-sharing agreements with the economic beneficiaries
 - better editorialisation of offers: at present, this is usually limited to the home page; for the rest of the site, the platforms prefer to limit their role to that of host, more particularly so that they cannot be held responsible in the event of unlawful content;
 - a policy for remunerating amateur creators to bring quality UGC productions to their sites.

Recent developments at DailyMotion, the first video share service in Europe, are a perfect illustration of these various points. DailyMotion signed catalogue agreements with a number of recognised content editors such as CNN International, AdultSwim, France 24, Nuts TV and, in France, with the trade union for audiovisual production (Union Syndicale de la Production Audiovisuelle - USPA), which provide it with access to the works of about 110 producers (representing about 80% of television fiction). These agreements are usually based on sharing the advertising income generated by making use of the content on the site.

At the same time, DailyMotion has set up the Audible Magic and INA digital tracing solutions on its service in order to limit the quantity of unlawful content.

It has also continued its globalisation, particularly by moving into the American market.

4.2.4 New players/intermediaries are appearing in the job chain: price comparers and video search solutions

Although the use of video search engines is still marginal, it is beginning to take root. The service Blinkx, for example, has already created its own network, with a total listing of 14 million hours of programmes from more than 200 partner media. Until now, the group has been positioned on the indexing of content in English, but it announced recently that its video search engine is soon to be available in France, Germany and Spain.

The contents indexed will include material from channels such as TF1, Eurosport and Euronews, as well as video content produced by the press editors El Mundo, Le Monde and Das Spiegel.

The group is also preparing its own VoD service, Blinkx Broadband TV, and is currently negotiating with the various economic beneficiaries. The service will be free of charge, financed by contextual advertising overlaid below the video and on clickables. The solution uses advertising technology from AdHoc.

Lastly, by way of an anecdote, we may record the noted arrival on the VoD market of price comparers. These have a high-profile presence in France, where three sites of this type are already on-line (Splarte, Total VoD, VoD Majors); they make it possible to find out not only which services distribute the film the user wants to watch (which is useful in a VoD landscape that is particularly scattered), but also to find out the various prices being charged.

4.3 INVENTORY OF DEVELOPMENTS IN VoD SERVICES CONCERNING EDITORIAL OFFER

4.3.1 Increasing number of feature films available, though as yet few are exclusive

The number of films present on the various VoD services has been increasing in recent months as a result of the economic beneficiaries, the studios and producers increasingly opening up their catalogues.

However, the increase in the offer of films on VoD services appears to be more the result of the studios making their old catalogues available, rather than their new films. The main reason for this is their desire to protect their associated markets, such as DVD, which brings in much more income than VoD.

In France, where data is published regularly, this trend is very marked. The increase in the catalogues put on-line is indeed confirmed by the national film agency (Centre national de la cinématographie - CNC) which, through its "VoD Observatory", noted that 1 904 films were available as VoD in June 2007 (on the platforms Orange, CanalPlay, TF1 Vision, Club-Internet, Arte VoD, Virgin Mega, and France Télévisions VoD), representing a 45% increase over November 2006.

NPA Conseil's VoD barometer, which measures films coming out on VoD platforms in France at regular intervals, nevertheless, shows clearly that new films are still a rarity – of 64 new films screened in cinemas between 7 March and 11 April 2007, just 7 were available as VoD to rent on a platform on 21 November 2007, which represented 10.9%.

It should nevertheless be noted that the situation could start to evolve. The producer Gaumont, which has until now been well in the background as far as VoD is concerned, announced in the summer of 2007 that it was opening its catalogue to the various VoD offers on the market and had decided to offer its films for rental thirty days after they had come out on DVD. It might even apply day-to-date releases (on DVD and VoD on the same day), on condition that a higher remuneration is negotiated with the service editors (there is talk of a 25% increase).

4.3.2 Television content making strong progress, with the emergence of offers of catch-up TV

Although originally VoD offers were launched mainly on the basis of cinema offers, they have since opened up considerably to television content, particularly with the arrival of catch-up TV.

These offers consist of making content that has just been broadcast by a television channel available rapidly in delinearised form.

In France, Belgium, the United Kingdom, Germany and the Netherlands, the offers of catch-up TV are particularly developed.

The first players to make such offers were, of course, the broadcasters, which have content and/or are in a position to negotiate for their rights.

In France, it should be noted that the emergence of offers of catch-up TV should form part of an evolution in regulation. The Tasca Decrees⁹, which – inter alia – limit the channel's entitlement to accede to the secondary rights or the rights of commercialisation of works by independent producers, could, in the context of the current consideration of the circulation of works, evolve in order to take account of the appearance of these new types of offer.

4.4 INVENTORY OF DEVELOPMENTS IN VoD SERVICES IN TERMS OF ECONOMIC MODELS

4.4.1 Rental models still dominant, and supported by the emergence of SVoD

The predominant economic model in the VoD market remains VoD unit rental. It constitutes the norm to which alternative models are sometimes added; these include Definitive VoD (sale of dematerialised video content), SVoD (VoD rental on subscription) and FoD (content proposed free of charge but paid for by advertising).

VoD sales services remain in a minority although they are increasing in number. At the end of 2007, for all the services recorded, about 10% were offering definitive downloading of content. The offer of definitive VoD is developing very unevenly across Europe. In France (with 10 services) and Spain (7 services), these offers are relatively abundant, whereas they seem to be scarcely developed at all in the Scandinavian countries, despite the fact that the VoD offer is rich (almost no definitive VoD service recorded in Denmark, a single offer in Finland, another in Norway, and another in Sweden).

While the offer is developing, use is not making much headway, as the content put on sale is generally considered to be too expensive.

⁹ The Four Tasca Decrees are:

- Decree No. 2001-609 of 09 July 2001 for the editors of national television services broadcast terrestrially in analog mode without encryption;
- Decree No. 2001-1332 of 28 December 2001 for the editors of services whose financing relies on remuneration received from users broadcast terrestrially in analog mode;
- Decree No. 2002-140 of 04 February 2002 for the editors of television services distributed by cable or satellite;
- Decree No. 2001-1333 of 28 December 2001 for the editors of television services broadcast terrestrially in digital mode.

As for SVoD, this is – according to the operators – one of the models, together with FoD, that holds the most potential for development in the future.

It is used at present mainly for making a profit from specific types of content (catch-up TV, content for young people, series, etc) that vary from one country to the next.

Thus in Belgium it is the offers of catch-up TV from broadcasters that are commercialised as SVoD, usually at a price of €5.95.

In France, it is in the youth segment that the offer is particularly present. Thus CanalPlay offers, for €4.99 per month, the content broadcast on the main channels directed at young people on cable and digital TV in France (Canal J, Cartoon Networks, Jetix and Zooloo Kids, Nickelodeon and TiJi).

Orange, via its round-the-clock video portal, also offers an SVoD package that uses content from Canal J (for €4.90 per month).

Alice has been the latest to make a name for itself by launching in October 2007 four SVoD offers directed at young people with content from TiJi, Jetix, Cartoon Network and Canal J. Each is accessible for a subscription of €5 per month.

SVoD is also beginning to move into the area of films and series. Thus in June 2007 Free launched a subscription VoD service at €5.99 per month, focusing on the cinema and series (about 50 films and 100 episodes available from Warner's and Disney's catalogues)¹⁰.

Orange had beaten Free to it with its 24/24 Series offer, which combines old series (*Largo Winch*, *Cosmos 99*, *The Persuaders*, etc) and more recent series (*Without a Trace*, *One Tree Hill*, etc).

Apparently Alice is also starting to prepare an SVoD cinema offer. For €7 per month, Alice subscribers will have access to about thirty films (with one-third renewed each month), which are to be a combination of old stock and recent titles.

One of the most active European players in terms of SVoD offers nevertheless remains the German operator Maxdome, which was very quick in developing subscription

¹⁰ On 15 January 2008, Free launched a new SVoD offer called Free Home Video Intégral, which provides unlimited access to all the themes on its VoD portal (cinema, series, music, kids and – coming soon – manga) for €9.99 per month.

schemes for offers of films or series. Maxdome is still extending its offer; it recently added content from the sport channels Werder.tv and Schalke04.tv and content for young people with its “Kids” package.

Table 5: Offers of SVoD in the Maxdome service

Offers	Price
Werder package	€3.99
Schalke package	€3.99
Kids package	€4.99
Comedy package	€4.99
Movie package	€9.99
Series package	€9.99
Premium package	€19.99

Source: NPA Conseil

4.4.2 FoD and insertion of contextual advertising – strong trends for the near future

Service editors believe FoD will be a lasting model in the long run. It is the model generally used by offers of catch-up TV in Europe (with the notable exception of Belgian broadcasters).

This model has the advantage of being attractive to those people who believe that paying anything at all is too expensive (and as a result watch videos using unlawful offers).

In the near future, the technologies for inserting contextual or customised advertising in video content, which are beginning to be developed, should ensure more economically effective exploitation than at present and promote an increase in the number of offers using this type of technology to earn income.

Table 6: Contextual advertising and customised advertising

	Contextual advertising	Customised advertising
Interested in	Video content	Demographic profile, geographical location, viewer preferences, etc
Via	Analysis of image and sound of content Data and metadata accompanying or either side of the video	Data obtained on registration, location, deciphering consumer habits, etc
Example	Advertising for a women's perfume incorporated in content directed at a female audience	Advertising for a women's perfume possible during a boxing match if the identified viewer is a woman

Source: NPA Conseil

Certain groups appear to be giving this model their specific support. This is the case of the RTL Group, which uses it on four of the markets where it is present, through its offers of RTL Now in Germany, Fivedownload in the UK, M6 Video in France, and RTL Gemist in the Netherlands.

Other groups have adopted it recently, such as Channel 4 for its service 4oD, or are testing it, such as TF1 in France on its TF1 Vision service.

2008 should see an explosion in this operating model, as the offers of catch-up TV continue to take shape.

LIST OF TABLES:

Table 1: Presentation of countries included in the study	3
Table 2: Summary of number of VoD services in Europe at the end of 2007	5
Table 3: Summary of growth by distribution network in the number of VoD services in Europe in 2007	6
Table 4: Main offers of IPTV in Europe	10
Table 5: Offers of SVoD in the Maxdome service	26
Table 6: Contextual advertising and customised advertising.....	27

LIST OF DIAGRAMS:

Diagram 1: Breakdown of VoD services by medium	7
Diagram 2: Proportion of VoD services on the Internet and penetration of broadband Internet	8
Diagram 3: Breakdown by medium of offers of catch-up TV	9
Diagram 4: Progress in monthly viewings of VoD content (in million) on the Virgin Media service	13
Diagram 5: Breakdown of VoD services by type of player	15

APPENDIX

List of VoD services by country with the following information by the end of the year 2007:

- ✓ Supplier
- ✓ Type of players
- ✓ Distribution network
- ✓ Business model
- ✓ Internet address

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
Austria	3sat (Chaine)	3sat (Chaine)	X	Broadcaster	Internet	catch-up TV free	http://www.3sat.de/mediathek/?obj=7078&mode=play
Austria	Aon Digital TV	Telekom Austria AG		Telecom operator	IPTV	rental VoD	http://www.aon.tv/portal/site/aonTV/menutem.
Austria	Aon TV	Telekom Austria AG		Telecom operator	Internet	rental VoD	http://www.aon.tv/
Austria	ARD	ARD	X	Broadcaster	Internet	catch-up, podcasts	http://www.daserste.de/Default.asp et http://www.daserste.de/interaktiv/
Austria	In2Movies	In2Movies		Content aggregator	Internet	rental VoD	http://www.in2movies.at/in2moviesat/
Austria	ORF	ORF	X	Broadcaster	Internet	catch-up TV free	http://tv.orf.at/ondemand/
Austria	Premiere Direct +	Premiere AG (DE)		Broadcaster	Satellite	rental VoD	http://www.premiere.de/premweb/cms/de/programm_pre mieredirekt_premieredirektplus_start.jsp
Austria	Premiere internet TV	Premiere AG (DE)		Broadcaster	Internet	rental VoD	http://vod.premiere.de/oxid/index.php?
Austria	RTL Now	RTL	X	Broadcaster	Internet	catch-up, rental VoD	http://rtl-now.rtl.de/
Austria	ZDF	ZDF	X	Broadcaster	Internet	catch-up TV free	http://www.zdf.de/
Belgium	Belgacom TV à la demande	Belgacom Skynet		Telecom operator	IPTV	rental VoD	http://www.belgacomtv.be/index.jsp?#module=home
Belgium	Cmore	SBS Belgium		Broadcaster	Cable	rental VoD, catch-up	http://www.tv-visie.be/nieuws/beigie/9oktober2006/c- more-de-on-demand--service-van-v4-en-vijftv_11336/ http://www.directmovie.be/Hoewerkhet.aspx
Belgium	DirectMovie	Direct Movie		Content aggregator	Internet	rental VoD	http://telenet.be/375/0/1/fr/particulier/television/tvtheque/ film-a-la-carte.html
Belgium	Films à la carte/TV-Thèque	Telenet		Telecom operator	Cable	rental VoD	
Belgium	iWatch	Vlaamse Media Maatschappij		Broadcaster	IPTV, cable and internet	rental VoD, catch-up	http://www.iwatch.be/2007/player.html?item_id=4221
Belgium	MTV Overdrive	MTV	X	Broadcaster	Internet	catch-up TV	http://nl.esperanto.mtv.com/player.jhtml
Belgium	Net Gemist	VRT		Broadcaster	IPTV Cable	catch-up TV	http://www.een.be/televsie1_master/vragen/e_idtv_neig ernist/index.shtml
Belgium	RTBF à la carte	RTBF		Broadcaster	IPTV and cable	rental VoD, catch-up TV programs	http://www.rtbfalacarte.be/rtbf_2000/events/rtbfalacarte/ events/numerique.html
Belgium	RTL Forfait 7/7 et RTL à la carte	CLT-UFA S.A (LU)		Broadcaster	IPTV and cable	SVoD catch-up	http://www.alinfini.be/tv_numerique.html
Cyprus	MVideO	CYTA		Telecom operator	IPTV	VoD and FoD	http://www.mivision.cyta.com.cy/english/movie_list.php? cat_id=3
Cyprus	Video on Demand	Prime Tel		Telecom operator	IPTV	rental VoD	http://www.primehome.com/Main/main.aspx?id=424
Denmark	CDON.COM Bredbandsfilm	CDON		Distributor of cultural goods	Internet	rental VoD	http://www.cdon.com/main.phtml?navroot=903&session =1
Denmark	DB Net	DB (Dansk Bredbaand)	X	Telecom operator	Internet, IPTV and cable	rental VoD	http://www.danskbredband.dk/479.aspx
Denmark	DR.dk TV	DR (chaîne publique)	X	Broadcaster	Internet	catch-up	http://www.dr.dk/odp/player.aspx?
Denmark	Fast TV biograf	Fast TV		Telecom operator	Internet	rental VoD	http://www.fasttv.dk/dk/Produktter/FastTV- Mediaportal/Biograf
Denmark	Live Networks	Live Networks		Content aggregator	Internet/ IPTV	rental VoD	www.livenetworks.dk
Denmark	Sf Anytime	Bonnier Group		Content aggregator	Internet	rental VoD	www.sf-anytime.com
Denmark	sputnik	TV2		Broadcaster	Internet	catch-up	http://sputnik.tv2.dk/
Denmark	Stofa TV	Stofa	X	Telecom operator	Cable	rental VoD	http://www.stofa.dk/
Denmark	TDC Film	TDC		Telecom operator	IPTV	rental VoD	http://film.tdconline.dk/
Denmark	Viasat On Demand	Viasat	X	Broadcaster	Internet	rental VoD	http://www.viasat.dk/cm/2_10/1_15257
Denmark	YouSee Cinema	TDC		Telecom operator	Cable	rental VoD	http://yousee.dk/privat/tv/kunde/cinema/genre.php
Estonia	DigiTV	Eilon	X	Telecom operator	IPTV	rental VoD	http://tv.elion.ee/videoaenutus/filimid.php
Estonia	ETV pluss	ETV		Broadcaster	Internet	rental VoD	https://www.etvpluss.ee/
Estonia	Starman	Starman		Telecom operator	cable	rental VoD	https://www.starman.ee/?nodeid=332&lang=et
Estonia	TV3 Internet TV	TV3	X	Broadcaster	Internet	catch-up TV	http://www.tv3.ee/content/blogcategory/14/27/

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
Finland	Areena	YLE	X	Broadcaster	Internet	rental VoD and sales	http://areena.yle.fi/
Finland	Film2Home	film2Home AB (SE)		Content aggregator	Internet	rental VoD and sales	www.film2home.fi
Finland	Live Network	Live Networks international AB		Content aggregator	Internet	rental VoD	http://www.livenetworks.com/Site/start.aspx?customerid=L3iqDPIPJZcPQkLuhVYlg==&http://netitv.mtv3.fi/f1/
Finland	MTV3 Anytime	MTV Oy		Broadcaster	Internet	catch-up TV	http://www.pixoff.net/fi/vuokraamo/skycaptain.asp
Finland	Pixoff	Provisual oy	X	Content aggregator	Internet	rental VoD	www.sf-anytime.com
Finland	Sf Anytime	Bonnier Group		Content aggregator	Internet	rental VoD	http://www.sonera.fi/Laajakaista/Palvelut/LaajakaistaTV#info
Finland	Tilausvideopalvelun	Sonera		Telecom operator	IPTV and internet	rental VoD	http://www.sonera.fi/Laajakaista/Palvelut/LaajakaistaTV#info
Finland	Viihdekaista - Tilausvideot (SF Anytime)	Elisa Oy		Telecom operator	IPTV and cable	rental VoD	http://elisa.net/eilisatv/
France	Public Sénat	Public Sénat	X	Broadcaster	Internet	catch-up	http://www.publicsenat.fr/cms/video-a-la-demande/
France	24/24 vidéo	Orange		Telecom operator	IPTV	rental VoD	http://www.orange.fr/bin/frame.cgi?u=http%3A/2424video.orange.fr/app%3Fdub%3D1
France	7 Highlight Street	7HLS.com	X	Content aggregator	Internet	rental VoD	http://www.7hls.com/
France	Archives pour tous	INA		Content aggregator	Internet	rental VoD	http://www.ina.fr/archivespour tous/index.php?action=ft&mc
France	Archos Content Portal	Archos	X	Equipment manufacturer	Internet	rental VoD	http://www.archos.com/products/gen_5/archos_605wifi/accp.html?country=fr&lang=fr
France	Arte VoD	ARTE		Broadcaster	Internet	rental VoD and sales	http://www.artevod.com/home.do
France	Arte+7	ARTE	X	Broadcaster	Internet	catch-up	http://plus.arte.tv/
France	Canal Play	Canal+ active		Broadcaster	Internet and IPTV	rental VoD, sales and duplication	http://www.canalplay.com/films/comedie/pas-si-grave_297_303_197.aspx
France	Clicmovies.net	MC&C	X	Content aggregator	Internet	rental VoD	http://www.clicmovies.net/catalog/index.php?page=home&th=19
France	Club Video	Club Internet		Telecom operator	IPTV	rental VoD	http://www.dartybox.com/presentation/offre_vod.htm
France	Dartybox VoD	Darty	X	Distributor of cultural goods	IPTV	rental VoD	http://www.editionsmontparnasse.fr/vod
France	Editions montparnasse	Editions montparnasse		Content aggregator	Internet	rental VoD	http://www.evodclub.fr/
France	Evod club	Evod club	X	Content aggregator	Internet and IPTV	rental VoD	http://fnacvod.glowria.fr/
France	Fnac video	Fnac		Distributor of cultural goods	Internet	rental VoD and sales	http://www.france5.fr/videos/
France	France 5	France Télévisions	X	Broadcaster	Internet	catch-up	http://www.francetvod.fr/
France	France tvod	France Télévisions		Broadcaster	Internet	VoD and catch-up	http://adsl.free.fr/tv/vod/
France	Free Home vidéo	Free		Telecom operator	IPTV	rental VoD	http://vod.glowria.fr/
France	Glowria	Glow Entertainment/Netgem		Content aggregator	Internet and IPTV	rental VoD and sales	http://vod.glowria.fr/
France	Imineo	W4tch		Content aggregator	Internet	rental VoD and sales	http://www.imineo.com/cinema/film-action/video-film-action.htm
France	Locafilm	Locafilm	X	Content aggregator	Internet	rental VoD, SVoD and FoD	http://www.cinezime.fr/ et www.locafilm.com
France	M6 video	M6		Broadcaster	Internet and IPTV	VoD and catch-up	http://www.m6video.fr/m6vod/jsp/content/home/home.js
France	Mes vidéos à la carte	Alice		Telecom operator	IPTV	rental VoD	http://www.alicebox.fr/television.html
France	mk2 vod	Mk2	X	Content aggregator	Internet	rental VoD and sales	http://www.mk2vod.com/films
France	Mon Video Club	Numericable		Telecom operator	Internet	rental VoD and FoD	http://videoclip.noos.fr/noos.php?theme=cine
France	MTV Overdrive	MTV	X	Broadcaster	Cable	catch-up	
France	Neuf VoD	Neuf Telecom		Telecom operator	Internet and IPTV	rental VoD	http://offres.neuf.fr/adsl/adsl-adsl-television/internet-television-neuf-vod.html
France	TF1 Vision	TF1		Broadcaster	Internet and IPTV	rental VoD and sales	www.tf1vision.fr
France	TF1.fr	TF1	X	Broadcaster	Internet	catch-up	http://videos.tf1.fr/video/emissions

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
France	Univercine	Le Meilleur du cinéma français		Content aggregator	Internet	rental VoD	http://www.universcine.com/home
France	Virgin Mega video	Virgin Mega		Distributor of cultural goods	Internet and IPTV	rental VoD and sales	www.virginmega.fr
France	Video tv	La Banque Audiovisuelle		Content aggregator	Internet and IPTV	rental VoD and sales	http://www.vodeo.tv
France	Xbox Live	Microsoft	X	Equipment manufacturer	Internet	rental VoD	http://www.xbox.com/fr-FR/live/
Germany	3sat (Chaîne)	3sat (Chaîne)	X	Broadcaster	Internet	catch-up TV free	http://www.3sat.de/mediathek/?obj=7078&mode=play
Germany	Absolut on Demand	Absolut Medien		Content aggregator	Internet	sales	http://www.absolutondemand.de/showpage.php
Germany	Alice Home TV	Alice		Telecom operator	IPTV	rental VoD	http://www.alice-dsl.de/kundencenter/export/de/residential/produkte/alice-fun/optionen/index.html
Germany	Anixe HD	Anixe	X	Content aggregator	Internet	rental VoD and sales	http://VoD.anixehd.tv/
Germany	Arcor Digital TV	Arcor		Telecom operator	Internet and IPTV	rental VoD	http://eshop.arcor.net/eshop/facade/97078003/0/97/dsl-videothek.html?
Germany	ARD Interaktiv	ARD (Das Erste)	X	Broadcaster	Internet	catch-up, podcasts	http://www.daserste.de/Default.asp et
Germany	ARTE+7	ARTE	X	Broadcaster	Internet	catch-up TV free	http://www.daserste.de/interaktiv/
Germany	Entertain Comfort	T-Home		Telecom operator	IPTV	catch-up, rental VoD	http://plus7.arte.tv/de/
Germany	Giga Videos in2movies	Giga Digital Television	X	Satellite	Internet	rental VoD	home.de/offers/comfort/comfort/?vprnr=4520002
Germany	Maxdome	In 2 movies		Content aggregator	Internet	rental VoD and sales	http://www.giga.de/features/VoD/4732/
Germany	Medionbox	Maxdome		Content aggregator	Internet	rental VoD	http://www.in2movies.de/in2movies/
Germany	Movie on Demand	Medion AG		Content aggregator	Internet and IPTV	rental VoD	http://www.maxdome.de/index.php
Germany	Movie-FLAT	Mein Ewe Tel		Telecom operator	Internet	rental VoD	www.medionbox.com
Germany	MTV Overdrive	1&1 / Maxdome		Telecom operator	Internet	rental VoD	https://mein.ewetel.de/30-19.php
Germany	My VoD	MTV	X	Broadcaster	Internet	catch-up TV	http://dsl.1und1.de/xml/order/DslMoviebox
Germany	One4movie	My VoD		Content aggregator	Satellite	rental VoD	http://mtv.de/videos
Germany	Premiere Direkt+	One 4 video		Content aggregator	Internet	rental VoD	www.myVoD.de/
Germany	Premiere internet TV	Premiere		Broadcaster	Satellite	rental VoD	http://www.one4movie.de/
Germany	Prima TV	Premiere		Broadcaster	Satellite	rental VoD	http://www.premiere.de/premweb/cms/de/programm_mieredirekt_premieredirektplus_start.jsp
Germany	RTL Now	Primacom		Telecom operator	Internet	rental VoD	http://VoD.premiere.de/oxid/
Germany	Select Kino	RTL		Telecom operator	Cable	rental VoD	http://www.primacom.de/produkte/primatv/primatv.php
Germany	video buster	Kabel Deutschland		Telecom operator	Internet	catch-up, rental VoD	http://rt-now.rtl.de/
Germany	Videoload	A movie		Content aggregator	Cable	rental VoD	http://www.kabeldeutschland.de/wunschfernsehen/index.html
Germany	Xbox Live	T Online	X	Telecom operator	Internet	rental VoD	www.amovie.de
Germany	ZDF mediathek	Microsoft	X	Equipment manufacturer	Internet	rental VoD, sales, duplication	http://www.videoload.de/
Hungary	Filmklik	ZDF	X	Broadcaster	Internet	catch-up TV free	http://www.xbox.com
Hungary	MTV videotar	Budapeszt Film	X	Content aggregator	Internet	rental VoD	http://www.zdf.de/ZDFmediathek/content/379112?inPop-up=true
Hungary	Rajzfilmek TV	MTV	X	TV channel	Internet	rental VoD	http://filmklik.hu/
Hungary	RTL Klub videotar	Rajzfilmek Rt		Content aggregator	Internet	catch-up TV free	http://www.mtv.hu/videotar/
Hungary	T-Online Hungary	RTL Klub	X	TV channel	Internet	FoD, rental VoD	http://www.rajzfilmek.hu/
Hungary	T-Online Teka	T-Online Hungary		Telecom operator	Internet	catch-up TV free	http://www.rtlklub.hu/videotar
Hungary	tv2video	T-Online Hungary		Telecom operator	IPTV	rental VoD	http://t-home.tv.hu/Pages/Videoteka.T-Home
Hungary		TV2	X	TV channel	Internet	rental VoD	http://fteka.t-online.hu/filmadatlap.html?fid=3039
Hungary					Internet	catch-up TV free	http://www.tv2video.hu/popup/index.php?images=naplo§ion=39&date=20071223

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
Hungary	Tv-tévé Videotéka	TV Net		Telecom operator	IPTV	rental VoD	http://www.tvnet.hu/iptv/?oldal=tvtrrol&oldal=videoteka
Iceland	N4 Vef TV	N4	X	Broadcaster	Internet	catch-up	http://www.n4.is
Iceland	Stónvarpið	Ríkisútvarpið RUV	X	Broadcaster	Internet	catch-up	http://dagakra.ruv.is/s
Iceland	Skjartví	Siminn		Telecom operator	cable, IPTV and internet	VoD and catch-up TV	http://www.skjartv.is/
Iceland	VefTV	365v media	X	Broadcaster	Internet	catch-up	http://vefmidlar.visir.is/
Ireland	BskyB	Sky Anytime		Broadcaster	Internet/ satellite	rental VoD and catch-up	anytime.sky.com
Ireland	Channel 4	40d		Broadcaster	Internet	rental VoD and catch-up	http://www.channel4.com/4od/index.html
Ireland	HomeVision	3PlayPlus	X	Equipment manufacturer	IPTV	rental VoD	http://www.3playplus.ie/media.html
Ireland	Lovefilm	Lovefilm		Content aggregator	Internet	rental VoD	lovefilm.com
Ireland	Magnet Entertainment	Magnet		Telecom operator	IPTV	rental VoD	http://www.magnet.ie/news/20-01-06.shtml
Ireland	RTE	RTE	X	Broadcaster	Internet	catch-up	http://www.rte.ie/tv/index.html
Ireland	Xbox Live	Microsoft	X	Equipment manufacturer	Internet	rental VoD	http://www.xbox.com
Italy	Alice Home TV	Télécom Italia		Telecom operator	IPTV	rental VoD	http://alicehomemtv.alice.it/
Italy	Fastweb	Fastweb		Telecom operator	IPTV	paying / free for catch-up	http://www.fastweb.it/link/?l=http://www.raiclicktv.it/raiclickkpc/secure/list_folder.srv?id=1895
Italy	Film is now	Eutelia		Content aggregator	Internet	rental VoD and sales	http://www.filmisnow.it/
Italy	Libero Film	Libero		Telecom operator	Internet	rental VoD	http://premium.libero.it/premium/tp/help/helpio001tc.jhtm?name=Libero%20Film
Italy	Mediaset.it video	Mediaset	X	Broadcaster	Internet	catch-up	http://www.video.mediaset.it/
Italy	MTV Overdrive	MTV	X	Broadcaster	Internet	catch-up TV	http://nl.esperanto.mtv.com/player.jhtml
Italy	RAI Click	RAI		Broadcaster	Internet and IPTV	catch-up	http://www.raiclicktv.it/raiclickkpc/
Italy	Rai.tv	RAI	X	Broadcaster	Internet	catch-up and podcasts	http://www.rai.tv/mptvindex
Italy	Rivideo	Mediaset	X	Broadcaster	Internet	rental VoD	http://rivideo.mediaset.it/home/index.shtml
Italy	Rosso Alice	Télécom Italia		Telecom operator	Internet	rental VoD	http://hp.rossoalice.alice.it/
Italy	Tiscali TV	Tiscali		Telecom operator	IPTV	rental VoD	http://tv.tiscali.it/vod.html
Italy	Tiscali.cineclub	Tiscali		Telecom operator	Internet	rental VoD	http://cineclub.tiscali.it/
Luxembourg	Archives	RTL Luxembourg	X	Broadcaster	Internet	catch-up	http://www.rtl.lu/televideoarchiv/
Luxembourg	MTV Overdrive	MTV	X	Broadcaster	Internet	catch-up TV	http://nl.esperanto.mtv.com/player.jhtml
Netherlands	AVClub Filmkanaal	Winkelwijis		Content aggregator	Internet	rental VoD - (Svod?)	http://winkelwijis.internetbios.tv/
Netherlands	Casema	Casema Entertainment Portal		Telecom operator	Internet	rental VoD, catch-up TV	http://www.eportal.nl/films/
Netherlands	Direct Movie	Direct Movie		Content aggregator	Internet	rental VoD - Svod	http://www.directmovie.nl/
Netherlands	DVD Download.nl	Cybersales Media		Content aggregator	Internet	rental VoD	www.dvddownload.nl
Netherlands	Film Direct	Mine TV		Telecom operator	IPTV	rental VoD - Fod	http://www.mine.tv.nl/
Netherlands	Film Huis	Film Club	X	Content aggregator	Internet	rental VoD	http://www.filmhuis.tv/
Netherlands	FilmClub	Film Club	X	Content aggregator	Internet	rental VoD	http://www.filmclub.tv/
Netherlands	Filmnu	Filmnu.nl		Content aggregator	Internet	rental VoD	http://www.filmnu.nl/
Netherlands	FreeDigital Movies	Free Internet Shop BV		Content aggregator	Internet	To-own VoD	http://www.freeDigital.nl (onglet movies)
Netherlands	HCC Cinema	HCC		Content aggregator	Internet	rental VoD	http://www.hccinema.nl/
Netherlands	KanalenKiezer film	n.c	X	Content aggregator	Internet	rental VoD - Free or charged access for web tv	http://film.kanalenkiezer.nl/
Netherlands	Kim.tv's GlobalCinema.nl	Globalcinema.nl		Content aggregator	Internet	rental VoD	http://kim.internetbios.tv/
Netherlands	KPN / Planet Internet	Planet Moviesstream		Telecom operator	Internet	rental VoD	http://moviesstream.planet.nl/planet/show
Netherlands	Leezy	Leezy B.V		Content aggregator	Internet	rental VoD	http://www.leezy.nl/algemeen/
Netherlands	Maxx-XS	Maxx-XS B.V		Content aggregator	Internet	rental VoD	http://cinema.maxx-xs.nl/
Netherlands	Movieplayz	Home (Essent)		Telecom operator	Internet	rental VoD	http://movies.home.nl

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
Netherlands	MTV Overdrive	MTV	X	Broadcaster	Internet	catch-up TV	http://nl.esperanto.mtv.com/player.jhtml
Netherlands	Multikabel Films	Multikabel	X	Telecom operator	Internet	rental VoD	http://films.multikabel.nl/
Netherlands	One2watch	One2watch.tv	X	Content aggregator	Internet	rental VoD	http://www.one2watch.tv/
Netherlands	RTL Gemist	RTL Nederland		Broadcaster	Internet	catch-up TV	http://www.rtl.nl/service/gemist/home/
Netherlands	RTL Video	RTL Nederland		Broadcaster	Internet	To-own VoD	http://www.rtl.nl/films/rtlvideo/home/
Netherlands	Steer Digital BV	Steer Videotheek online		Content aggregator	Internet	rental VoD or to-own VoD	http://www.stervideotheekonline.nl/
Netherlands	Tele 2 videotheek	Tele 2		Telecom operator	IPTV	rental VoD	http://www.tele2.nl/tele2tv/videotheek/
Netherlands	Tiger Online	IFFR via Tiscali		Content aggregator	Internet	rental VoD	www.tigeronline.nl
Netherlands	TV OP JE PC	Yellow Lemon Tree		Content aggregator	Internet	rental VoD	http://fvopje.pc.internetbios.tv/
Netherlands	Tv Thuis	Tv Thuis.nl	X	Content aggregator	Internet	rental VoD	http://fcherry.tvthuis.nl/site/
Netherlands	Uitzendinggemist	NOS (NED 1, NED 2, NED 3)		Broadcaster	Internet and IPTV	catch-up TV	www.uitzendinggemist.nl / www.kpn.tv / www.tele2.nl/shop/TV/index.htm
Netherlands	UPC On Demand	UPC Nederland	X	Cable operator	Cable	rental VoD, catch-up TV (included in UPC subscription)	http://www.upc.nl/televisie/films/
Netherlands	Videoclub	Tiscali		Telecom operator	Internet	rental VoD	http://videoclub.tiscali.nl/
Netherlands	Zeelandnet FilmOnline	Zeelandnet B.V		Telecom operator	Internet	rental VoD	http://zeelandnet.internetbios.tv/
Norway	C More on demand	Lyse Tele	X	Telecom operator	IPTV	rental VoD	http://www.lyse.no/category.php?categoryID=5054
Norway	CDON.COM Bredbandsfilm	CDON		Distributor of cultural goods	Internet	rental VoD	http://www.cdon.com/main.phtml?navroot=904&nav=16135
Norway	Fast TV	Fast Tv	X	Telecom operator	Internet	rental VoD	http://www.fasttv.no/no/untilted/Bio.html
Norway	Film Arkivet	Norsk Filminstitutt et Norgefilm		Content aggregator	Internet	rental VoD	http://www.filmarkivet.no/v1/index_portal.aspx
Norway	Film2Home	Film2Home		Content aggregator	internet	rental VoD	www.film2home.no
Norway	iVision	iVision		Telecom operator	internet	rental VoD	http://www.ivision.no/dt_subpage.aspx?m=48
Norway	Live Networks	Live Networks		Content aggregator	Internet	rental VoD	www.livenetworks.dk
Norway	Live Networks	Live Networks		Content aggregator	Internet and IPTV	rental VoD	http://www.livenetworks.se/www/
Norway	Nett TV	NRK - tv publike	X	Broadcaster	internet	catch-up TV free	http://www.nrk.no/p3tv/ # http://www1.nrk.no/nett-tv/klipp # http://www1.nrk.no/nett-tv/direkte #
Norway	Online Film	Telenor	X	Telecom operator	IPTV and cable	rental VoD	http://online.no/underholding/index_kampanjer.html?ca t=film&CID=P-ON-00010-DIV-01
Norway	Salten Bredband Film Leie	Salten Bredband		Telecom operator	IPTV	rental VoD	http://www.saltenbredband.no/salten/produkt/tv/filmleie
Norway	Sf Anytime	Bonnier Group		Content aggregator	Internet	rental VoD	www.sf-anytime.com
Norway	tv2video	TV2	X	Broadcaster	internet	rental VoD	http://webtv.tv2.no/webtv/
Norway	ViaSat On Demand	Viasat	X	Satellite operator	internet	rental VoD	http://www.viasat.no/cm/2.10/2.2358/1.5759
Poland	Cyfra+	Cyfra + (Groupe Canal +)	X	Satellite operator	Satellite	rental VoD	http://www.cyfraplus.pl/cyfraplus_2.html
Poland	ITi Neovision.	"N" VoD		Satellite operator	Satellite and IPTV	near VoD service SPTI blockbuster movies	http://n.pl/vod/
Poland	iTVP	Telewizja Interaktywna iTVP (Filiale de groupe public TVP)		Content aggregator	Internet	catch-up TV free	http://www.itvp.pl/
Poland	Telewizja cyfrowa	Vectra	X	Telecom operator	Cable	VoD	http://www.program.vectra.pl/index.php?sender=96
Poland	Telewizja video on demande	Multimedia Polska	X	Telecom operator	Cable	VoD	http://www.vectra.pl/vectra.php?i=1&i=1&k=3
Poland	Telewizja video on demande	Multimedia Polska	X	Telecom operator	Cable	VoD	http://www.multimedia.pl/005110c7638fc493400ea8f26e49f885
Poland	Telewizja video on demande	Multimedia Polska	X	Telecom operator	Cable	VoD	http://www.multimedia.pl/950bb966b1d2d35bfd39c2a39e8ee529

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
Poland	Wideo na życzenie/ Videostrada	TP SA (TELEKOMUNIKACJA POLSKA)		Telecom operator	IPTV and internet	VoD; SVoD	http://www.tp.pl/prt/pl/klenci_ind/internet/now_prom/663608/
Portugal	Clix SmarTV	Clix		Telecom operator	IPTV	rental VoD	http://accesso.clix.pt/televisao/index.html
Portugal	Meo TV	Portugal Telecom	X	Telecom operator	IPTV	rental VoD	http://www.meo.pt/Pages/default.aspx
Portugal	Sapo	Portugal Telecom	X	Telecom operator / Content aggregator	internet	FoD (TV Ciencia, Hi-Life), catch-up of SIC	http://videos.sapo.pt/
Portugal	SIC Sapo	SIC	X	Broadcaster	Internet	catch-up	http://sic.sapo.pt/online/video/programas/
Portugal	TV Online	Radio e Televisao de Portugal	X	Broadcaster	Internet	catch-up	http://multimedia.rtp.pt/index.php?aud=1
Portugal	Video-On-Demand	Tv Cabo		Telecom operator	cable / satellite	rental VoD	http://www.tvcabo.pt/Televisao/DestaquesVOD.aspx
Slovakia	JOJ	TV JOJ	X	Broadcaster	Internet	Video archive/catch-up TV free	http://www.joj.sk/tv-archiv.html
Slovakia	Maglo	Slovak Telekom	X	Telecom operator	IPTV	rental VoD	http://www.telecom.sk/Default.aspx?CatID=1738&Section=home
Slovakia	STV	STV	X	Broadcaster	Internet	Video archive/catch-up TV free	http://www.stv.sk/videoarchiv/
Slovakia	TA3	TA3	X	Broadcaster	Internet	Video archive/catch-up TV free	http://www.ta3.com/
Slovakia	T-Station	Slovak Telekom		Telecom operator	Internet	rental VoD and sales	http://myhome.station.zoznam.sk/portaldt/?provider=IndexAuthLess
Slovenia	Internet TV	24ur.com (Central European Media Enterprise : CME)	X	Broadcaster	Internet	catch-up	http://24ur.com/maslovnica/index.php (Accès direct popvtv.si)
Slovenia	RTV Slo MMC (Multimedijiski Center)	RTV Slovenija	X	Broadcaster	Internet	catch-up	http://24ur.com/bin/video_internettv.php
Slovenia	T-2 Videoteka	T-2	X	Telecom operator	IPTV	rental VoD	http://tv.t-2.net/
Slovenia	Video na zahtevo	Siol TV (Telekom Slovenije)	X	Telecom operator	IPTV	n.c (rental VoD?)	http://storitve.siol.net/SIOL-TV/video-na-zahtevo/Catalogue visible sur http://www.siol.tv/Catalog.aspx
Spain	3 a la carta	TV Catalunya	X	Broadcaster	Internet	catch-up	http://www.tv3.cat/3alacarta/video.htm?ID=124759&CATID=tvcat
Spain	Accine	SDAE		Content aggregator	Internet	rental VoD and sales	http://www.accine.com/
Spain	Catch up / FOD	Terra Tv	X	Telecom operator	Internet	rental VoD	http://player.terra.tv/nsp.aspx?player=terra_spain
Spain	Centro Virtual Cervantes	Instituto Cervantes	X	Content aggregator	Internet	rental VoD and sales	http://videoteca.cvc.cervantes.es
Spain	Cine.com	Cine.com	X	Content aggregator	Internet	rental VoD and sales	http://www.cinemaspain.com/ver/ver.php
Spain	Filmoteca	Ya.com	X	Telecom operator	Internet	rental VoD and sales	http://filmoteca.ya.com
Spain	Filmotech	Filmotech	X	Content aggregator	Internet	rental VoD and sales	www.filmotech.com
Spain	Imagenio Videoclub	Imagenio		Telecom operator	IPTV	rental VoD	http://imagenio.telefonicaonline.com/DIN/revista-digital-imagenio/index.htm?
Spain	Jazztelia	Jazz Telecom		Telecom operator	IPTV and internet	rental VoD and sales	http://www.jazztelia.com/videoclub
Spain	MXP Digital	MediaXpress		Content aggregator	Internet	rental VoD and sales	www.mxpdigital.com
Spain	Ojo	ONO		Telecom operator	Cable	rental VoD and SVoD	www.ojo.tv
Spain	Pix box	Telefonica	X	Telecom operator	Internet	rental VoD and sales	http://www.terra.es/pixbox/portada.htm
Spain	Television a carta	TVG (Galicie)	X	Broadcaster	Internet	catch-up	http://wap.crtvg.es/TVG/acarta.asp
Spain	TV a la carta	Canal Sur	X	Broadcaster	Internet	catch-up	http://www.radiotelevisionandalucia.es/
Spain	Videoclub	Orange		Telecom operator	IPTV	rental VoD	http://tv.orange.es/

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
Sweden	Canal+ Select Canal+ On demande et Film2Home	CanalDigital AB		Broadcaster	IPTV	rental VoD and SVoD	http://www.canalplus.se/page.asp?guid=9CC5F9EE-C900-4B62-B1CD-02B9F4E64FD0
Sweden	CDON AB	CDON.com		Distributor of cultural goods	Internet		http://www.cdon.com/main.phtml?navroot=902&nav=16065
Sweden	CinemaOne	CinemaOne AB		Content aggregator	internet	rental VoD	http://www.cinemaone.se/
Sweden	Fast TV	Fast TV		Telecom operator	IPTV	rental VoD	http://www.fasttv.se/
Sweden	Film2Home	Film2Home AB (SE)		Content aggregator	Internet	rental VoD	http://www.film2home.se
Sweden	Headweb	Headweb	X	Content aggregator	Internet	rental and sales	http://www.headweb.com/
Sweden	HomeTV	Horse Creek Entertainment AB		Content aggregator	Internet	rental VoD	http://www.hometv.se / http://www.hometvnightclub.com/
Sweden	Live Entertainment	Telia	X	Telecom operator	IPTV	rental VoD	http://www.liveentertainment.se/www/
Sweden	Live Networks	Live Networks International AB		Content aggregator	Internet	rental VoD	http://www.livenetworks.com/Site/start.aspx?
Sweden	SF Anytime	Bonnier Entertainment AB		Content aggregator	Internet	rental VoD	www.sf-anytime.com
Sweden	Svt Play	SVT	X	Broadcaster	Internet	catch-up	http://svt.se/play
Sweden	TV4-anytime	TV4		Broadcaster	Internet	catch-up TV	http://www.tv4-anytime.se/clients/territory.aspx
Sweden	ViaSat On Demand	ViaSat AB	X	Telecom operator	Internet	rental VoD	http://www.viasat.se/cm/2.10/2.802/1.17712
Sweden	Video on Demand	Telia		Telecom operator	IPTV	rental VoD	http://www.telia.se/privat/produktier_tjanster/tv/tjanster_som_ingar/veeondemand/
Sweden	Video on Demand	Bredbandsbolaget		Telecom operator	IPTV	rental VoD	http://www.bredband.com
Sweden	Webb-Tv	Svenska Spel AB	X	Broadcaster	Internet	FoD	http://svenskaspel.gbrick.com
Switzerland	3sat (Chaine) digital cinema	3sat (Chaine) Cablecom	X	Broadcaster	Internet	catch-up TV free	http://www.3sat.de/mediathek/?obj=7078&mode=play
Switzerland	Divx et MC&C	Clicmovies/divix video	X	Content aggregator	Cable	VoD	http://www.cablecom.ch/fr/index/tvradio/ueber_digitaltv/ideo_on_demand.htm
Switzerland	DVDFly VoD	Homedia S.A		Content aggregator	Internet	VoD sales	http://www.clicmovies.net/catalog/index.php?page=home&th=19
Switzerland	In2Movies	in2Movie GmbH(Warner/Arvato Mobile)		Content aggregator	Internet	rental VoD	http://www.dvdfly.ch/vod.asp
Switzerland	Pacte de l'audiovisuel	SRG SSR	X	Broadcaster	Internet	rental VoD	http://www.in2movies.ch/in2moviesch/
Switzerland	sf.tv video	SF	X	Broadcaster	Internet	rental VoD	http://www.srg-ssr.ch/339.0.html?&L=1
Switzerland	Teclub on demand	Swisscom Fixnet S.A		Telecom operator	IPTV	catch-up TV	http://www.sf.tv/var/videos.php
Switzerland	TSR video	TSR	X	Broadcaster	Internet	catch-up TV	http://www.tv.bluewin.ch/fr/vod/
Turkey	Digiturk Web TV	Digiturk	X	Satellite operator	Internet	rental VoD	http://www.tsr.ch/tsr/index.html?siteSec=500000
United Kingdom	4oD	Channel4		Broadcaster	Internet, cable and IPTV	VoD and catch-up	http://www.digiturkwebtv.com/
United Kingdom	Aol Film download	AOL		Content aggregator	Internet	rental VoD and sales	http://lallyours.virginmedia.com/html/dtv/ondemand/index.html
United Kingdom	BBC iPlayer	BBC		Broadcaster	Internet	catch-up	http://www.channel4.com/4od/index.html
United Kingdom	BTVision	Telecom BT		Telecom operator	IPTV and internet	VoD and catch-up	http://filmdownloads.aol.co.uk/visitor/home.html
							http://www.bbc.co.uk/iplayer/
							http://www.btvision.bt.com/

Country	Name of VoD service	Supplier of VoD service	New in 2007 (X)	Type of player	Distribution network	Business Model	Internet address
United Kingdom	FilmFlex	FilmFlex Movies Ltd (Joint venture des groupes onDemand Group, Sony Pictures, International et Disney), le partenaire exclusif de Virgin Media au UK		Content aggregator	Cable	rental VoD	http://www.filmflexmovies.co.uk/
United Kingdom	Fivedownload	Channel 5 Broadcasting		Broadcaster	Internet	VoD and catch-up	http://download.five.tv/
United Kingdom	Lovefilm	Lovefilm		Content aggregator	Internet	rental VoD and sales	lovefilm.com
United Kingdom	MTV Overdrive	MTV	X	Broadcaster	Internet	catch-up TV	http://nl.esperanto.mtv.com/player.jhtml
United Kingdom	Screen Gems	Sony/Tiscali		Telecom operator	IPTV	VoD	
United Kingdom	Sky Anytime	BSkyB		Broadcaster	Internet and Satellite	VoD and catch-up	http://anytime.sky.com/
United Kingdom	Tiscali TV (ex HomeChoice)	Video Networks/Tiscali		Telecom operator	IPTV	VoD and catch-up	http://www.homechoice.co.uk/tv/tv.html
United Kingdom	Top Up TV anytime	Top Up TV		Content aggregator	TNT	Push catch-up	http://www.topuptv.com/anytime/index.html
United Kingdom	TV Catchup	TV Catchup	X	Content aggregator	Internet	catch-up	
United Kingdom	Virgin TV on Demand	Virgin Media		Telecom operator	Cable	catch-up	http://www.digitalspy.co.uk/digitaltv/a80295/virgin-signs-deal-for-star-trek-on-demand.html?
United Kingdom	Watch Now	ITV		Broadcaster	Internet	VoD and catch-up	http://www.itv.com/Watchnow/CatchUp/default.html
United Kingdom	Xbox Live	Microsoft	X	Equipment manufacturer	Internet	rental VoD	http://www.xbox.com