

NAGRA
KUDELSKI

NAGRA
Anti-Piracy Services



“Putting a Stop to Illegal IPTV Distribution of your
Content – Real Solutions to get Real Results

July 25th, 2017, David Wurgler

Kudelski Group

Content Security Solutions



World Leader in Integrated Content Security Solutions

- Leading provider of content security solutions to the world's largest digital television service providers
- Securing >\$70B annual content revenues
- +2,100 employees

Public Access Security



World Leader in Public Access Solutions

- Global leader in access and revenue management solutions, providing fast and safe access for people and vehicles
- Securing >10,000 locations in >90 countries
- +1,200 employees

Cybersecurity Solutions



Switzerland's Largest Cyber & Media Security Company

- Innovative, independent provider of tailored cybersecurity solutions to enterprises and public sector institutions
- Milestone Systems acquisition in May 2016
- M&S Technologies acquisition in Jan 2017

- Founded in **1951**
- **1,067M** CHF in Revenue, (KUD: SIX EX)
- Operating in **33 countries**
- **200M** CHF R&D budget
- **5,300** patents, **300** new annually
- **+3,800** employees

End-to-End Content Protection

Service, Device & App
Security



Anti-Piracy
Services



Forensic Marking

A premium security provider for the owners and distributors of video content: live events, movies or channels.

We combine leading technologies with first class services and innovations to help them control the illegal use of their content and ultimately protect their revenues.

Anti-Piracy Services Team



80+ Staff

Experts in content security, technology, intelligence and legal



Global presence

Main offices in Switzerland, Spain, USA, India – Security Experts in 33 countries

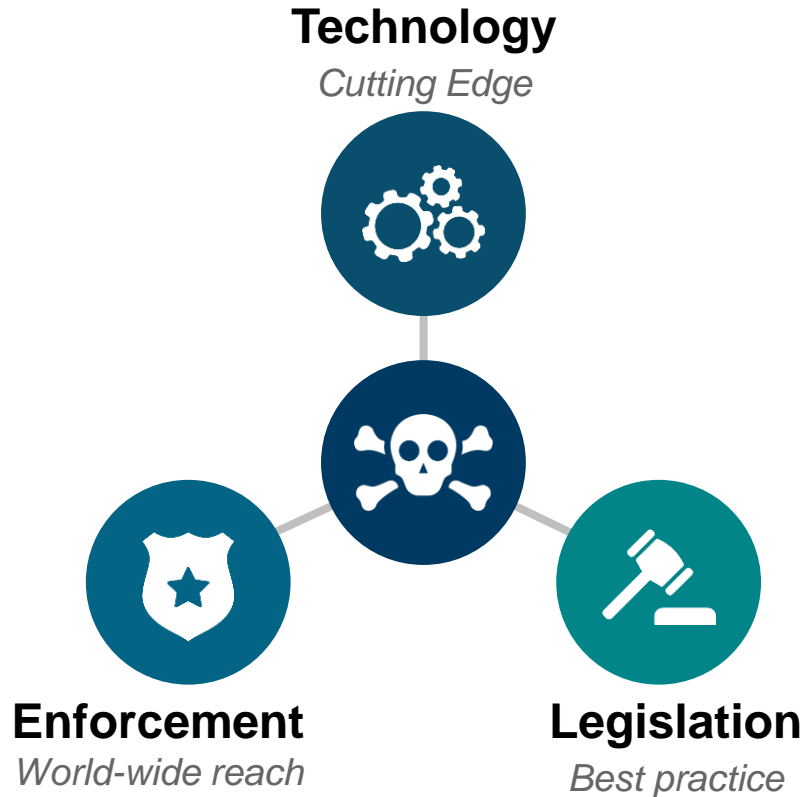


20 years experience in anti-piracy

Providing tailored media security services



Anti-Piracy Principles



- Anti-Piracy is all about Escalation and Deterrent
- There is no Silver Bullet
- Build the best possible toolbox to hit pirates and always anticipate their possible next move

“In US alone companies lose over 2.4 billion USD every year”

IAB

“In Spain, football distributors lost 271M€ in 2016 due to Piracy”

La Coalición

“In Asia, pay-TV industry incurs a loss of over 1 billion USD yearly”

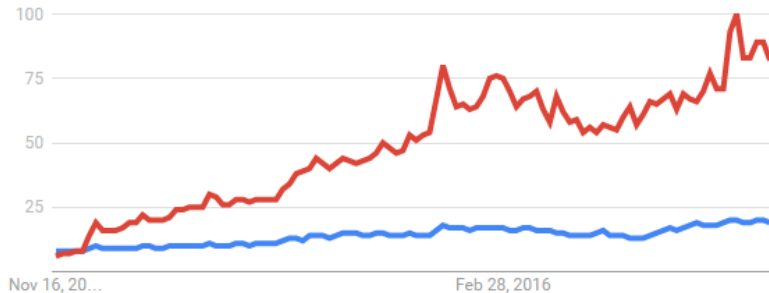
CASBAA

“Piracy is a scourge. It damages industries, puts live sports and events at risk and threatens thousands of jobs”

Peter Tonagh, Foxtel CEO

Trend: Kodi IPTV

- Fork of Xbox Media Center (XBMC)
- Plugin & Repository Framework
- Did not exist 18m ago
- >100k YouTube tutorials with millions of views



Google Trends: Kodi vs IPTV

The image shows a YouTube search interface for 'kodi iptv'. The search bar at the top contains the text 'kodi iptv' and a magnifying glass icon. Below the search bar, there are four video thumbnails, each with a yellow box highlighting its view count:

- 1,849,661 views
- 1,237,652 views
- 1,086,822 views
- 1,028,311 views

The search results also show the video titles and some metadata, such as 'How to watch live TV on Kodi' and 'How to Setup Live TV on KODI (XBMC) Watch +1000 TV Channels - PVR IPTV...'. The total number of results is indicated as 'About 187,000 results'.

Content Sharing Threat

PAY PIRACY

Pirate business models: selling hardware or subscription

Vertical STB
Kodi (most)
m3u (most)



Premium
Content
Under
Attack !

“FREE” PIRACY

Pirate business models: Advertising
or malware spread

Web
“Rojadirecta” like




Services Portfolio



Control Word
Sharing Protection



Content Sharing
Protection



Cybersecurity
(Media) Services

Selling comprehensive security program or itemized services in the area of consulting, intelligence investigations, forensic, countermeasures, legal, pen-testing, audits, etc....

Content Sharing Protection Services

Cutting Edge
Monitoring Platform

Monitoring Platform finds all infringing streams

Unrivaled Partner
Takedown Program

Takedown infringing streams best-in-class KPI

Litigations

Escalation for non compliant service providers

Content Sharing Protection Service

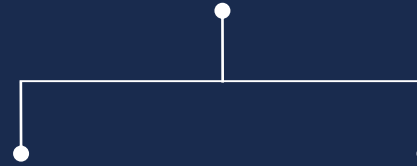
Cutting Edge Monitoring Platform



Find all infringing streams



Unrivalled Takedown Program Disrupt Pirate Service



Partner

Get privileged access to takedown service



Litigate

Tackle non-compliant service providers



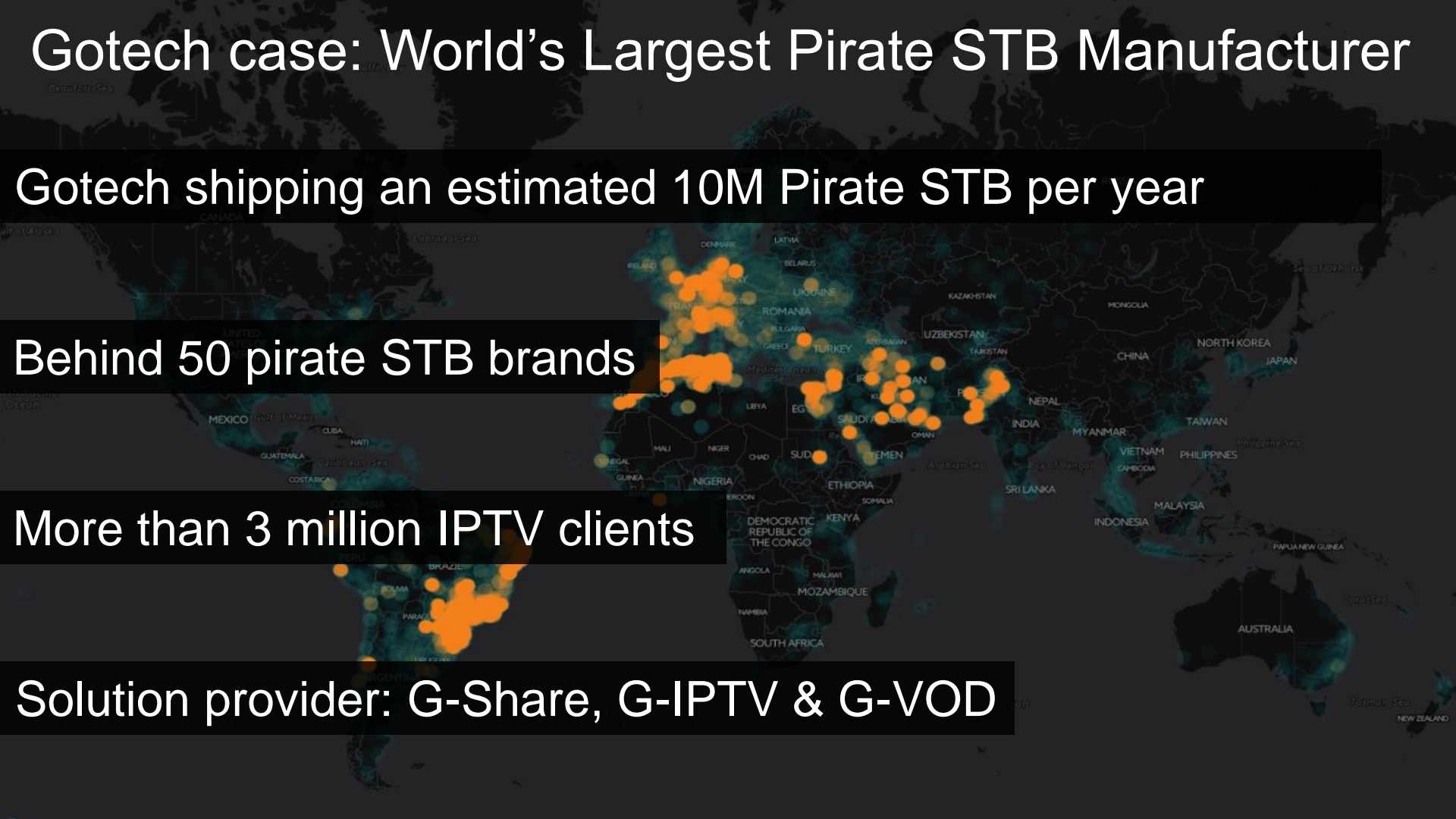
Gotech case: World's Largest Pirate STB Manufacturer

Gotech shipping an estimated 10M Pirate STB per year

Behind 50 pirate STB brands

More than 3 million IPTV clients

Solution provider: G-Share, G-IPTV & G-VOD



Final judgment and permanent injunction

United States District Court
Southern District of Texas

ENTERED

August 18, 2016

David J. Bradley, Clerk

**UNITED STATES DISTRICT COURT
SOUTHERN DISTRICT OF TEXAS
HOUSTON DIVISION**

NAGRAVISION SA,

Plaintiff,

vs.

ZHUHAI GOTECH INTELLIGENT
TECHNOLOGY CO. LTD;
GOTECH INTERNATIONAL
TECHNOLOGY LTD.;
GLOBALSAT INTERNATIONAL
TECHNOLOGY LTD.; and
DOES 1-12,

Defendants.

§ Civil Action No. 4:15-cv-00403

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FINAL JUDGMENT AND PERMANENT INJUNCTION





**More than 500 million users enjoy
Kudelski Group solutions every day**