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Next Generation Access Services Analysis of Portfolios



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Agenda

- **Context and methodology**
- Overview of findings
- Service trends
- Key Conclusions
- Annex: Service highlights



Context and sample

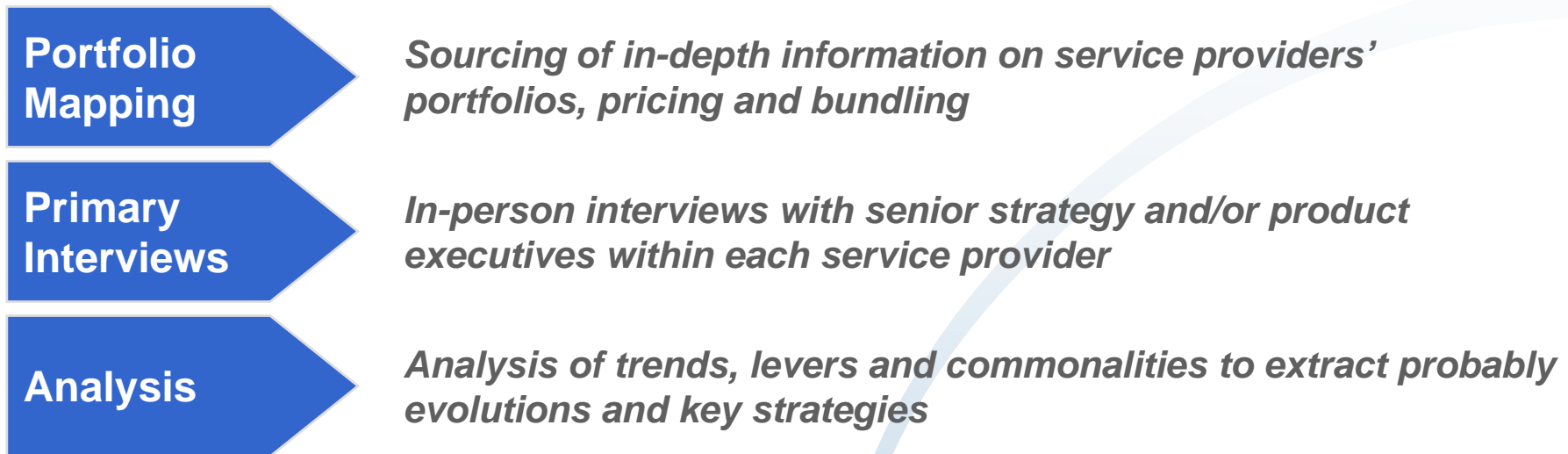
- The present study aims at analyzing the service portfolios of next generation access operators around the world in order to identify
 - The nature of services currently offered by service providers to their NGA customers around the world
 - The attractiveness, relative profitability and technical requirements of these services
 - The directions in which service providers are developing new services or envisage to develop services in the future
- Yankee Group and the FTTH Council commonly decided to include the following 20 service providers* in the study:



** Even though some of the projects analysed are open access and therefore not technically service providers themselves, the terminology of « service provider » is used throughout the study for reasons of simplicity.*

Methodology and deliverables

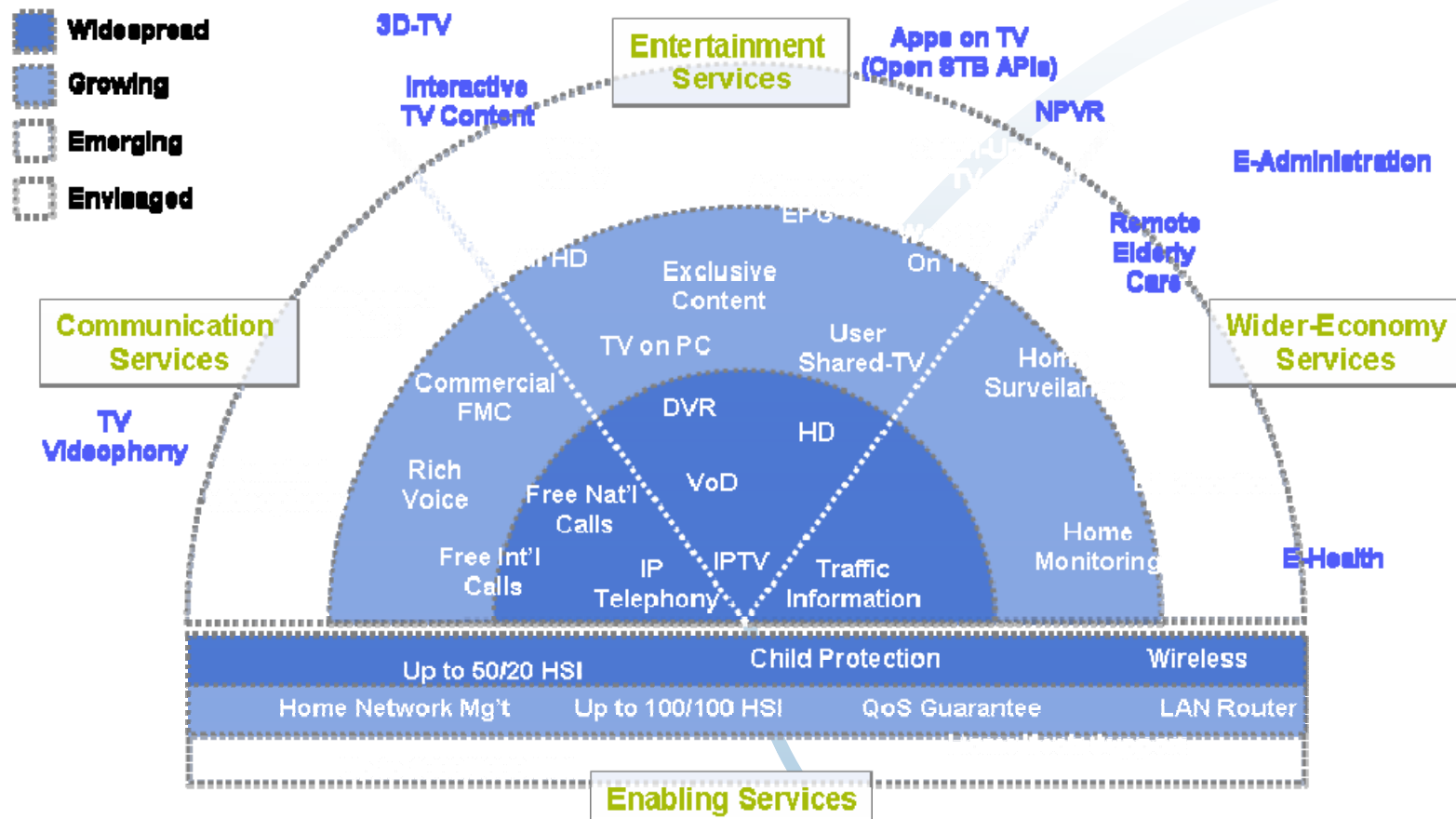
- Yankee Group's Methodology was articulated around three phases:



- The study presents two key deliverables:
 - The Service Catalog** (115 pages): for each service provider, graphically presents the service portfolio and prices as well as bundling options
 - The Analysis of Portfolios** (41 pages): this document describes the trends and analyses the results from the study. It includes many verbatim statements from the primary interviews

Service portfolio overview

- Throughout the study, services are categorized using the following representation. The “levels” presented are used in the service catalog to convey an overview of the richness of services offered by each SP.



Normalised pricing

- When comparing prices, ARPUs and other financial data in this study, normalised prices were derived from actual prices in order to form a fair basis for comparison.
- In order to avoid skewing the results through exchange rates or cost of living differentials, all prices were converted to normalised USD using official 2008 OECD Purchasing Power Parity conversion rates for the OECD*
- As a result, the following conversion rates were used from local currencies to USD (note that rates for EUR differ for each country due to purchasing power differences between European countries)

Currency	Normalised USD
AED	0,188361517
AUD	0,680272109
Belgian EUR	1,123595506
CAD	0,819672131
CHF	0,598802395
DKK	0,114942529
French EUR	1,098901099
GBP	1,538461538

Currency	Normalised USD
German EUR	1,176470588
HKD	0,175438596
JPY	0,008596974
KRW	0,001316274
Netherlands EUR	1,136363636
NOK	0,106382979
SEK	0,107874865
USD	1

* For Hong-Kong, IMF PPP rate was used. For UAE, PPP was recalculated on the basis of CIA data.

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Overall analysis of strategies

- Throughout the study it became apparent that **three different strategies** were at play on the market. These strategies drive **different approaches to services**:

The **broadband utility** strategy focuses on the access. They aim to provide high quality reliable internet access to as many customers as possible.

Often Witnessed In:

Local/municipal projects
Utility led projects
Altnets

The **expand and cash-in** strategy consists in a wide network deployment with little service added value until a critical mass of customers is met.

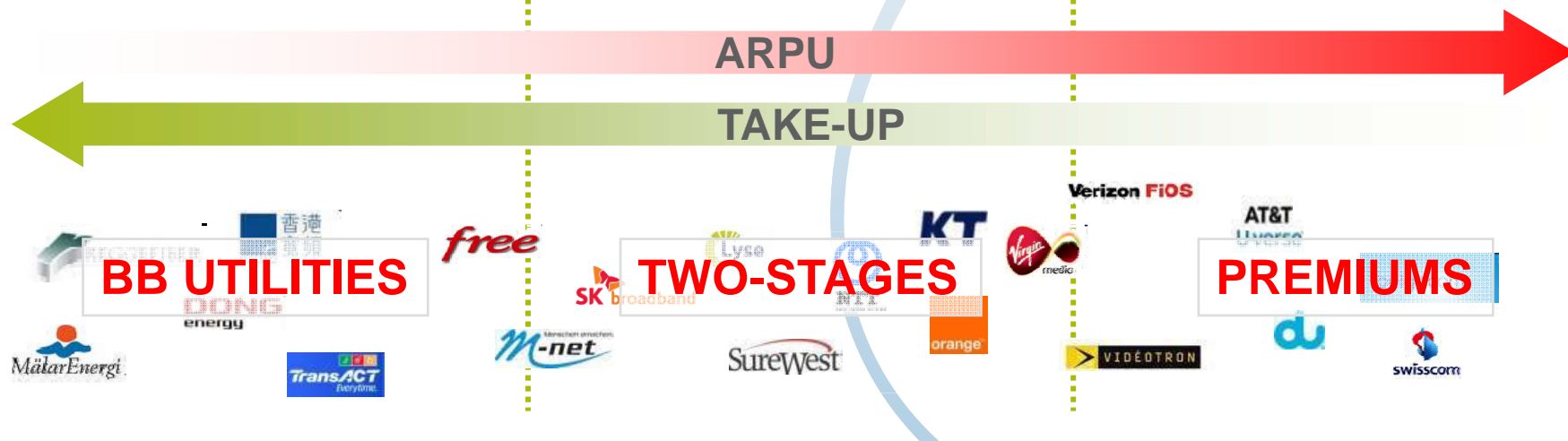
Often Witnessed In:

Local Operators
Altnets
Cable Operators

The **keep it premium** strategy aims for sexy NGA services at premium prices, to address a small customer base without cannibalising existing revenues.

Often Witnessed In:

Incumbents
Cable Operators
Low competition countries/areas



Drivers for Deployment

- There are essentially **three drivers** dictating NGA deployment:

Anticipation of Long-Term Demand

Deploy new network or upgrade existing to enable coping with long-term customer demand in bandwidth and service quality

Lareg incumbent: « *We could see demand for bandwidth was growing and copper wouldn't scale forever. And we knew deploying fiber would take time... »*



Move in the Competitive Game

Deploying the NGA infrastructure to differentiate, go after new markets or respond to a competitor who is doing so

Large Incumbent: « *The cable operators were eating into our broadband market share. We had to be able to offer TV, and it had to be better than theirs... »*



Lower Dependency on Incumbent

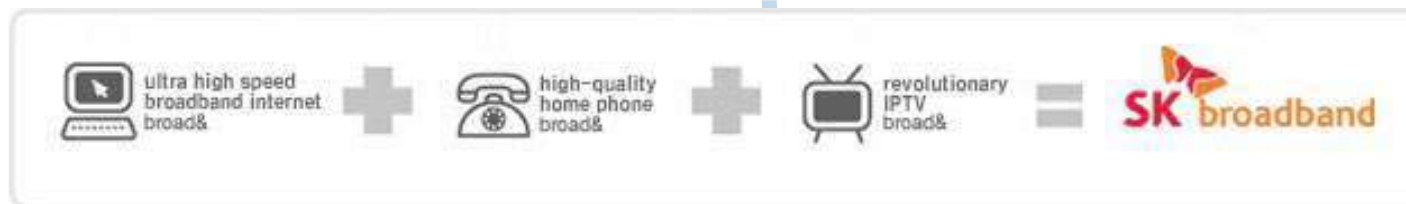
Save on unbundling charges and/or ensure survival when incumbent disconnects the copper plant

ISP: « *DT has announced that they were disconnecting their copper plant in 2013-2014. It's not like we have a choice... »*



Bundling strategies

- All service providers want their customers to subscribe to multiple services. How they achieve multiple service penetration, however, varies greatly.
 - Large Incumbent: « *Customers with multiple services not only generate more ARPU but they are much stickier as well.* »
- For most service providers, **broadband is the anchor product**: you can't purchase other services if you don't buy broadband.
 - Exceptions include most FTTN players for whom TV tends to be the anchor product
 - Cable operators tend to have **no anchor product** and offer all combinations of services, as do operators whose deployments are so advanced that they **can't refuse a customer service**
- Most (but not all) service providers offer some form of **discounted bundle**.
 - Premiums however tend to have **minimal (if any) discount**
- Some SPs (especially two-stages) offer **all-inclusive bundles only** with two (often broadband and telephony) or three services.
 - ISP: « *Our strategy from the beginning of DSL has been to have a single product that constantly gets better. We have no reason to change approaches with fiber.* »



Network and usage considerations

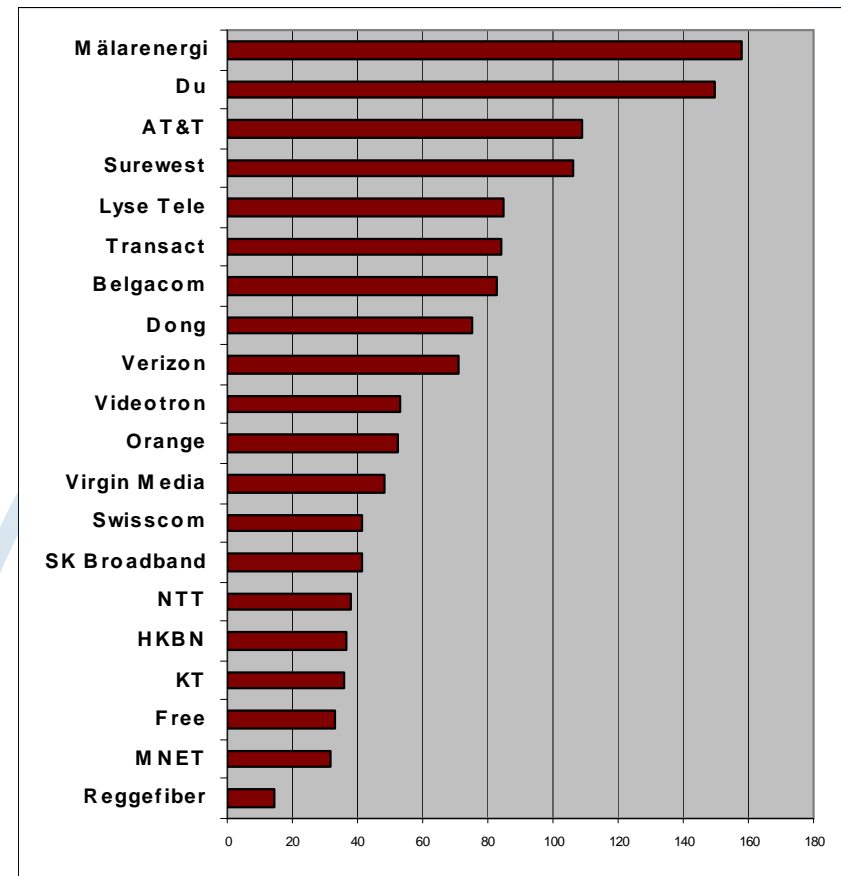


- All FTTB and FTTH projects will admit to “significant” impacts on their core architecture and transit costs (when not native to NGA).
- Some smaller altnets are proud to say that they apply no contention:
 - Regional Incumbent: « *In theory, our contention is 1:1 but in fact we overprovision. We want every customer using an online test to know they’re getting what they paid for.* »
- FTTH users have significantly higher access line load:
 - If one uses the access load of bitstream customers as a reference, unbundled DSL customers access line **average load is 2x** that of bitstream customers and the **average load of FTTH customers is 10x**.
 - Regional altnet: « *Seen from the outside, our network is a net producer. Our customers upload more than they download.* »
- Some of the smaller SPs expect or see that offering customers high upload gives them **more weight in negotiating peering agreements**. Indeed some have already felt that change.
- Some also anticipate that this will mean **the end of “free” peering** with content providers as the cost to peer increases with equipment renewal and capacity increase.
- Only one SP (HKBN) in the sample offers 1 Gb/s symmetric service but the capacity to overseas internet is only 20Mb/s symmetric.
- HD TV is an driver for further NGA deployment
 - Incumbent: « *Currently, our VDSL network allows to deliver a single HDTV stream reliably, but DVRs are driving demand for at least two streams. Ultimately, FTTH would allow us to deliver 4.* »

Pricing (broadband)

- When comparing prices, projects with **high set-up fees** tend to be penalized even if the prices examined are done so over a two year period.
- Generally, North American prices tend to be higher than European prices, which tend to be higher than APAC prices.
- There is a tendency for BB utilities to have **lower prices** although set-up fees can again offset this (Mälarenergi and Dong)
- Unsurprisingly, competitive intensity in a given country tends to drive prices down.

Price Comparison for Broadband (~30/30)
(Normalised USD)



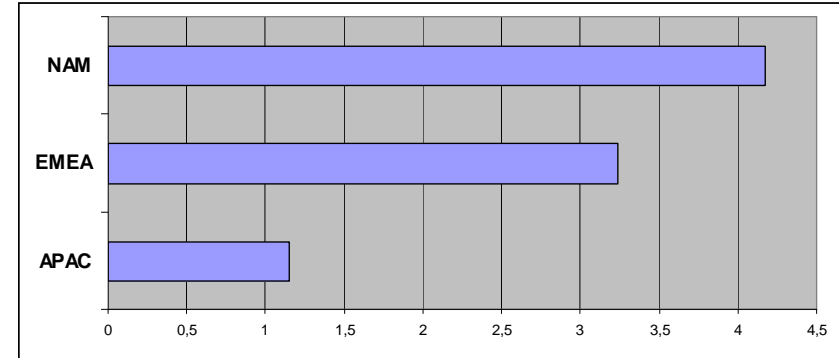
Broadband: as close to 30/30 as possible

Pricing (downloaded megabyte)

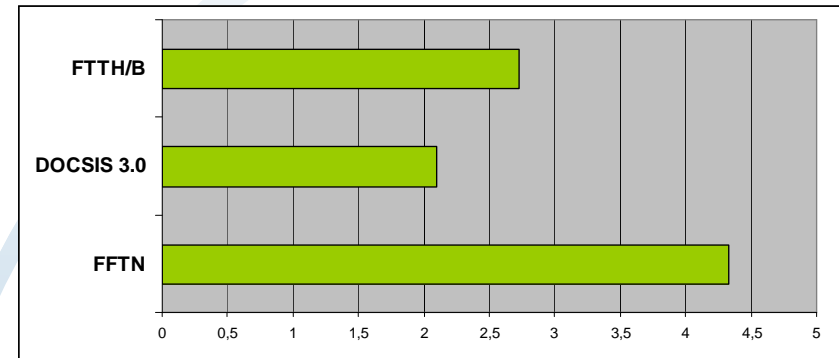
- North American prices per Mbps are the highest, and Asia-Pacific are the lowest.
- FTTN prices are the highest while FTTH/B and DOCSIS 3.0 prices are comparable.
- Operators following Premium strategies are the highest priced. Utility and Cash-In have comparable prices
 - The exception is Mälarenergi whose business model loads up-front costs and therefore skews the average.

Prices per Mbps download (Normalised USD)

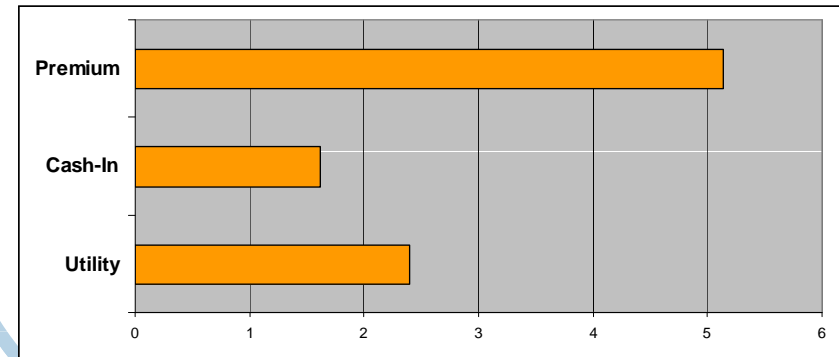
By Geography



By Technology



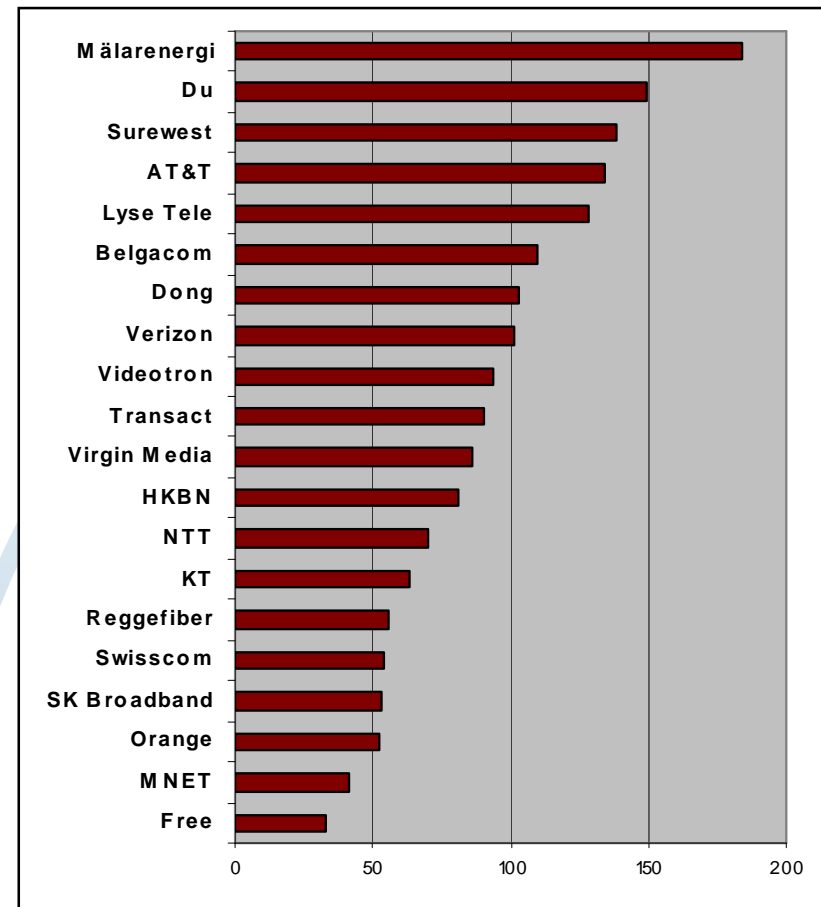
By Strategy



Pricing (triple play)

- Triple play pricing is slightly less dispersed than broadband pricing.
- Bundled-only offers (Free, Orange) or bundles with significant discounts (SK Broadband) tend to be better priced.
- Overall, North America tends to be the most expensive again and APAC the cheapest.
- Technology choices seem to have less of an impact on triple play prices than they have on broadband prices.

Price Comparison for Triple Play
(Normalised USD)

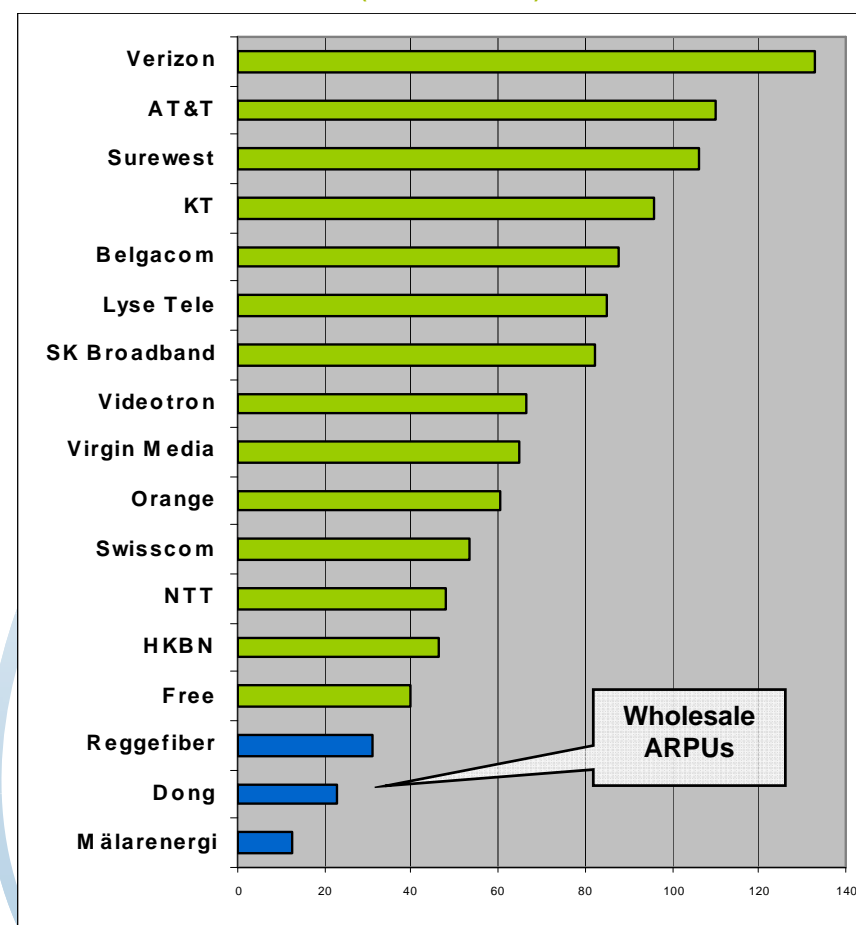


Broadband: as close to 30/30 as possible
TV: basic package (when available)
Telephony: basic subscription

ARPU

- ARPU of the access line varies considerably, even putting aside the fact that pure wholesale operations have lower ARPUs by definition.
- Again, US service providers have considerably higher ARPUs than in the rest of the world.
- For most SPs that have both legacy broadband and NGA, ARPUs are significantly higher (20-30% on average) even with service offerings that are not necessarily considerably different.
- Unsurprisingly, SPs with “utility broadband” strategies have lower ARPUs than those with more service oriented strategies.

ARPU through broadband access
(Normalised USD)



Sources: Official releases, primary interviews, YG estimates
Missing: Du, M-NET & Transact

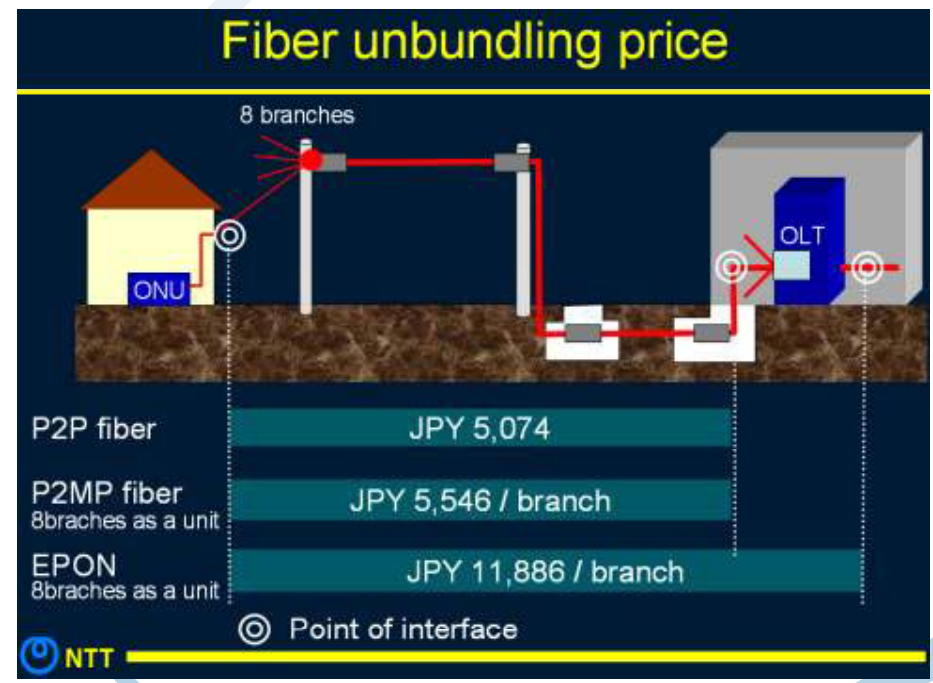
Economic considerations and service strategies



- FTTH deployment payback ranges from 6 years to ~20 years.
 - Large Incumbent: « *The FTTH product will be profitable in 2010.* »
- A number of fiber projects have already broken even (Lyse, HKBN, Mälarenergi)
- For most altnets, the key driver to adoption and also the **most profitable service is broadband**. TV tends to be low margin because of rights issues and Telephony is a low attractiveness service.
 - Altnet: « *TV is expensive to set-up and the rights are very expensive, especially for “small” operations like ourselves.* »
- For most incumbents, the key driver to adoption is HDTV and the key revenue generator is legacy voice.
 - Incumbent: « *In the absence of significant penetration of IP Telephony, our most profitable product remains PSTN, but we believe that will diminish over time, hence the need to develop today the revenue generators of tomorrow.* »
- Free estimates that its FTTH product will ultimately generate **over 70% gross margin**. HKBN currently generates around 30% and has a **long term goal of 45%**.

Wholesale strategies

- With the (obvious) exception of open access projects, very few service providers currently have wholesale strategies.
- NTT is forced to unbundle by the Japanese regulator. They are also forced to sell internet service separately than access service so that over a dozen ISPs can provide services over NTT's access (the customer can be billed separately or not).
- Swisscom is not currently forced to open its FTTN, but is considering FTTH deployment with an “easy to unbundle” architecture in mind.
- Most service providers consider wholesale to be handing customers to competitors. For these players, **the idea of wholesaling to non-telecom providers** has, for the most part, **not been considered** although again NTT is ahead of the game and is considering various active models to allow just that.
- Some service providers see mobile backhauling as a sort of wholesale product, but it's not really taken into consideration in the overall business model (separate business lines).



Open Access Networks



- Open Access Networks have service strategies even though they don't (for the most part) offer services themselves.
- In general, the service offerings available over open access networks examined in this study tend to be “run of the mill” if not “below par”.
 - Bandwidth for broadband tends to be good to excellent
 - TV services are sometimes absent, or very minimal (no HD, etc.)
 - Telephony tends to be not very attractive economically
 - There are few if any bundles
- The OA network providers are aware of this issue, which they attribute to:
 - the absence of large national providers on their networks
 - **Open Access Operator:** « *The service providers that we have on our network are not willing or capable of taking risks in service innovation. They lack the money.* »
 - their own lack of scale
- The exception to this is, to a large extent, Reggefiber which has been fostering service innovation with some success.

Approach to the SoHo/SME market

- **As a rule, service providers have not deployed FTTH with the SME market in mind.**
 - Some incumbents (NTT, KT), are rolling out everywhere anyway.
 - For other incumbents the reasons are organizational.
 - For smaller players, it's to stay focused, both on deployments and on capacity to serve the SME market.

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- **While it could have been expected to see SoHo specific service offerings pushed forward (likely to generate higher ARPU), only two service providers have explicit SoHo packages (Orange and Swisscom).**
- **While the business side of things may not be at the core of the projects, that doesn't mean that the service providers don't address the needs of small and medium businesses when the opportunities arise:**
 - Incumbents have their own business divisions, but there's usually no connection with the residential side except for the potential SoHo overlap,
 - Altnets tend to have offers (Lyse) for classic business services but also work with dedicated ISPs or integrators for more advanced services
 - Open Access networks resell to business ISPs to integrate their access products and ensure that their SLAs meet the ISP needs (Mälarenergi)

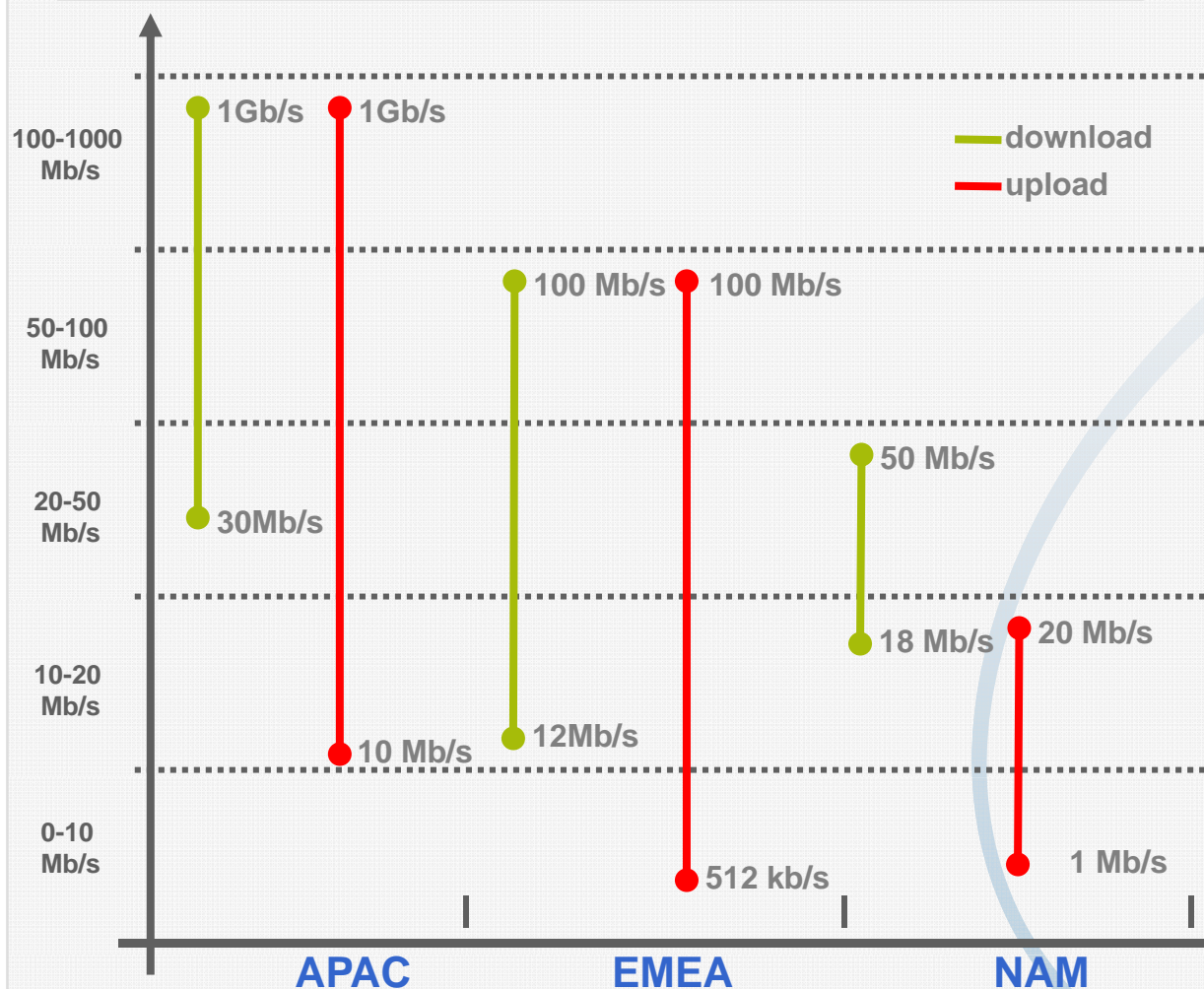
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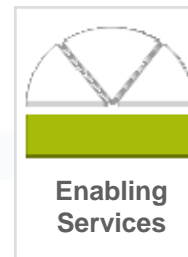
Technology is the key enabler of bandwidth

Range of best available down and up speeds per geography



- Bandwidth offered is, unsurprisingly, tied closely to technology choices.

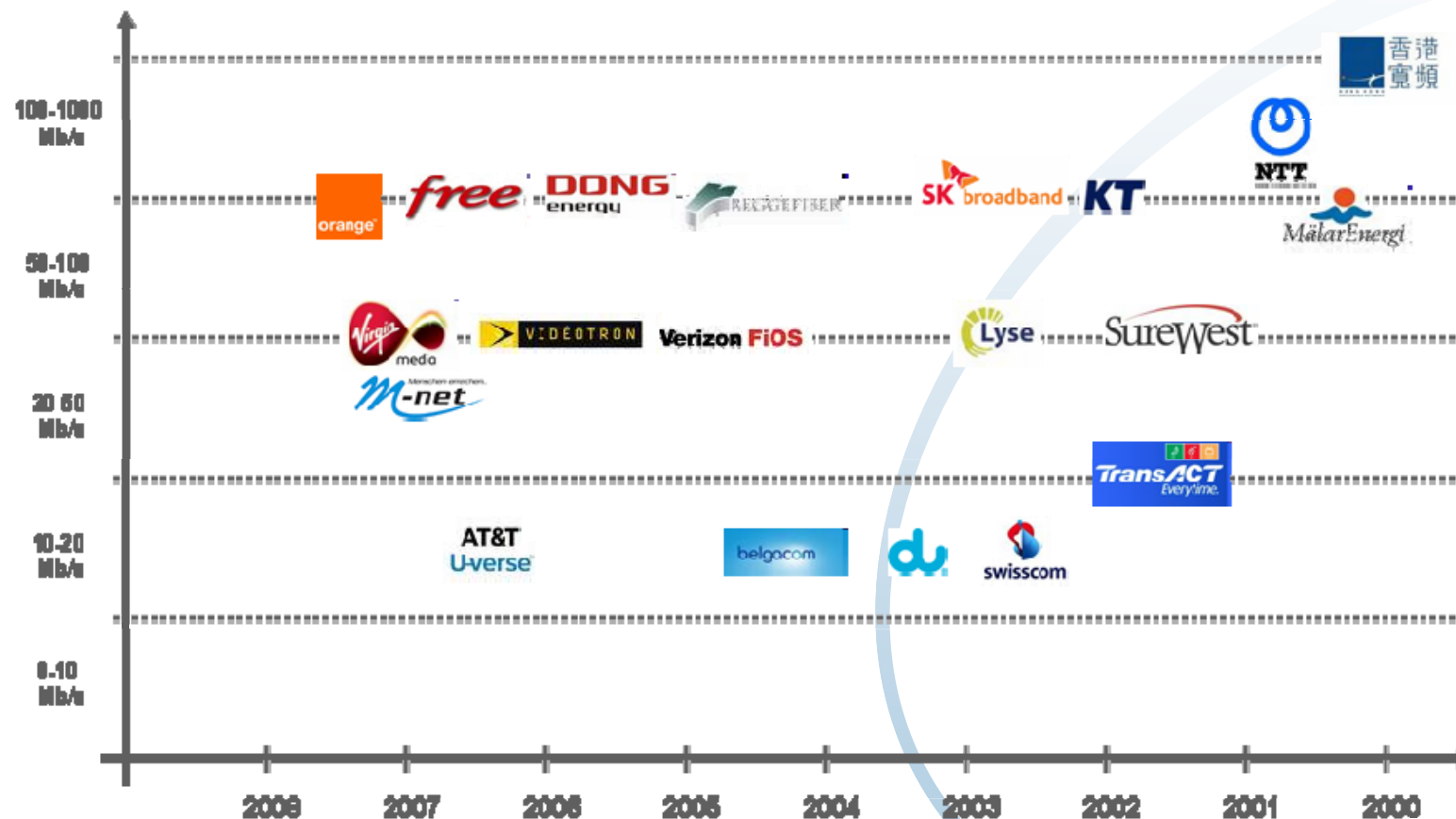
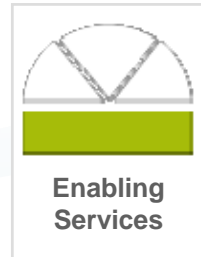
- No FTTN service provider offers more than 20/1
- No Docsis 3.0 provider offers more than 50/1
- FTTB or FTTH operators offer a whole range of bandwidth levels



- The maximum available bandwidth witnessed in the sample is HKBN's bb1000 which offers 1Gb/s symmetric.
- Enabling services offers always feature email and web storage space and are often enriched with security services.
- BB utilities tend to enhance their offerings with additional services like home networking (BPL), ftp, wifi, fixed IP addresses, etc.

Older deployments offer better speeds

- Overall, older projects tend to have higher headline speeds, but this is not a determining factor and is probably more driven by the competitive environment.



More bandwidth and more support



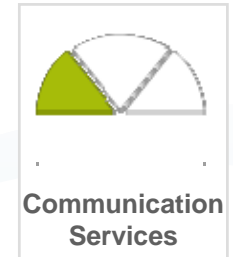
- A number of service providers that already offer 100Mb/s symmetric service are looking at the jump to 1Gb/s or more.
 - **Altnet:** « *We're trialing 100Mb/s and considering 1Gb/s. We're concerned it may have unexpected impacts on our core and transit though.* »
 - **Altnet:** « *We have had great success with our Gb/s product. It's probably too early to go beyond at this stage, but within 18-24 months, it's likely that the demand will be there.* »
- For service providers following a keep it premium strategy, bandwidth offerings are much more modest and more likely to adjust as competition catches up rather than proactively.
- More bandwidth is not the sole area where innovation may occur. SPs, especially in the US and APAC are seriously considering home networking and home IT support services as a way to upsell existing customers.
 - **Regional Incumbent:** « *As what your PC and home network allow you to do expands, more and more customers are lost. We already treat hotline calls that are not related to our network, so we're seriously considering moving into that area.* »



Limited innovation around communication



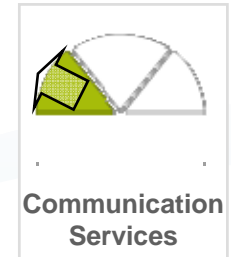
- **Currently there are no service providers offering communication services other than voice.**
- **With two exceptions (see below) the voice service itself is largely undifferentiated.**
- **Tariffs is where the major differences occur. More specifically, what destinations are included for free in the basic subscription.**
 - Most (but not all) service providers offer on-net for free.
 - A large number of providers, especially in Europe, offer national wireline for free.
 - Really aggressive offers include international wireline for free.
 - A number of offers feature “buckets of minutes” to anywhere schemes but these are not part of the basic package.
- **Richness of functionality is largely comparable although some service providers still charge for each function (voice mail, call blocking, call forwarding, etc.) while others include everything for free.**
- **Two examples expand the realm of voice services:**
 - Lyse’s convergent telephony offer
 - NTT’s HQ Voice service



Video communication is the end game

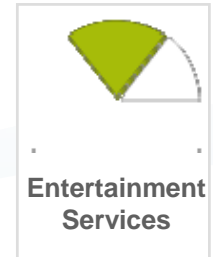


- The short term evolution in communications that only concerns operators that own and/or rent a mobile network is an **increased level of convergence**. This is not related to NGA per se but would allow the SP to leverage the richer services in the home through a mobile connection.
- Despite the absence of video-communication in the service portfolios studied (except NTT for businesses, see below), all agree that it will be a key capability of next generation networks.
- SPs disagree on how to get there and who should offer the service though.
- BB utilities tend to think that high quality video communication will not be offered by them but will be available on the internet anyway.
- Premiums are considering video services but faced with a number of issues:
 - Dedicated terminal or existing device
 - TV or PC-centric
 - Technology issues
 - Interoperability considerations
- NTT has launched a **wideband voice service** which is mostly aimed at businesses but, as phone standards evolve could become commonplace in the home.

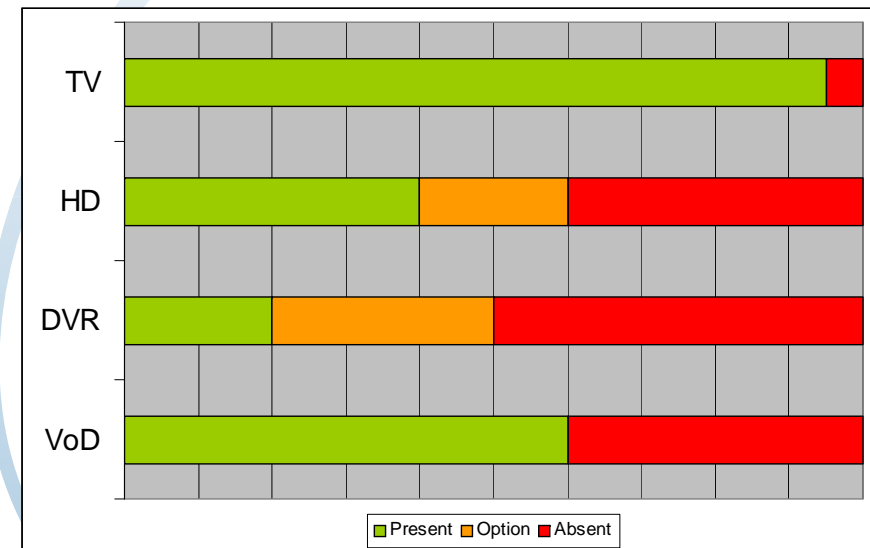


HDTV is an acquisition driver

- All the service providers in the sample except one (M-NET) offer TV services.
- Over half offer HDTV, but it's still a paying option for some. None of the Open Access projects in the sample offer HD.
- About half offer DVRs and it's a paying option for most of them.
- Over half offer some form of VoD. A few offer some form of limited catch-up TV.
- Service providers all agree that HDTV is an acquisition driver, but not all are capable or willing to develop such services themselves.
 - Altnet: « *We have a basic TV service, but it doesn't aim at competing with premium services on the market. Our focus is to connect customers to broadband.* »
- Innovative trends on entertainment services include:
 - EPG (Verizon) ease of access to content.
 - Youtube on your TV (Free and Surewest)
 - PC-access to exclusive online sports or educational content (Verizon and Reggefiber)



Availability of TV Services accross SPs



More and richer content

- In the short term, more HD and more premium content seem to be the core evolution to be expected in next generation service offerings
 - **Large Incumbent:** « *HDTV is a key driver, but content is an ecosystem and now we're facing issues with content provider who lack capacity on their end.* »
 - **Open Access Operator:** « *We're in discussions with various providers to offer HDTV which has been lacking in Vasteras so far.* »
 - **ALL HD** is an expressed goal for some service providers, but again they depend on content owners/distributors to make it happen.
- Further out, SPs are interested in exploring:
 - **Gaming:** NTT has struck deal with Nintendo and Microsoft to offer access to online game shops
 - **3D:** Orange ran a trial last summer broadcasting the Roland Garros tennis open in 3D over fiber
 - **Interactive TV:** Some players envisage enabling STBs with open APIs so that third party entertainment apps can be deployed



Entertainment
Services



SPs are not reaching beyond their current scope



- The development of wider economy services is currently very limited.
- Home Security / Home Monitoring services is the only service that has been launched by several SPs in the sample (NTT, Surewest, Lyse).
- SPs recognize the potential for such services but have other priorities or consider it will take a long time to make potential partners join them. Few SPs have a real sense of how their organizations would engage such partners.
- Large Incumbent: « *There has been a lot of focus on serving customers who own PCs. Now we need to shift to offering services that are meaningful to people who are not tech-savvy.* »
- NTT was the only SP in the sample to have a framework of external partnerships already in place; not always on wider economy services (Nintendo) but with promising approaches to healthcare monitoring, for example (Tanita).



Putting foreign ecosystems in motion is tough



- **Healthcare is a clear “winner” for many SPs, but few have undergone any concrete steps to make it happen.**

- NTT has a deal on health monitoring with Tanita, but it's not proper healthcare yet
- Reggefiber is running a trial for remote doctor video consults in Almsfoort
- SK Broadband is offering phone consults (not NGA-grade!) and could expand that to video in time
- Clearly, HQ 2-way video communication is a crucial enabler for healthcare.



- **Large Incumbent:** « *A lot of services are very successful in field trials, but the business model is shot by home equipment issues, especially when video is required.* »

- **Some see potential in expert intermediation platforms with the right video service in place.**

- **Large Incumbent:** « *Every customer can register himself as an expert in his field. Users log onto the service and connect to whichever expert they need that is online. They have a video exchange, the customer is billed by us and we share the revenue with the expert.* »

- **A number of service providers have also mentioned education as an interesting area to explore**

- SK Broadband and one of Reggefiber's SPs are currently offering interactive educational video, but it's very limited so far and PC-based.

An overview of services offered to businesses



- **Most service providers, even when they're not incumbents, tend to offer the following services, either on their own or in partnership:**
 - Business grade SLAs
 - Centrex
 - VPNs
- **SoHo offerings if they exist are largely revamped consumer offers. Sometimes that allows the SP to target certain verticals:**
 - Altnet: « *We have great success with hospitality services because they like our TV service a lot for their customers.* »
- **NTT has a more ambitious (and horizontal) business service offering with Telepresence and HQ Voice at the heart of the offer. Necessary equipment is still considered too expensive for these offerings to trickle down into the SME market (although NTT is seeing some success with HQ Voice).**
- **An Open Access Operator has started acting as a LAN manager for a number of public services and businesses and is considering expanding this role. Effectively, for them, it's as if the business was an SP and desktops are like FTTH customers.**

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Key Learnings



Economics & Business Model

- A number of FTTH operations are **already profitable**
- Service prices **vary widely** across geographies
- NGA ARPUs are **reliably 30+% above** DSL ARPUs
- Broadband in itself **is a profitable product** (in fact, the most profitable for many players)

Usage & Network Impacts

- FTTH users currently **use 5 to 10 times as much access line capacity** as DSL users
- FTTH-only operations **tend to be net contributors of traffic** to the wider internet
- Peering and **transit dynamics are evolving** driven by NGA

Services & Innovation

- Most service portfolios are currently designed to drive adoption
- HD is a key driver for adoption and the target for service providers is to **deliver 2+ simultaneous HD streams**
- The **SoHo market is underserved** with NGA service offers and seems to be a disregarded low-hanging fruit
- **Video communications** are seen as a **crucial service and enabler** of wider-economy services, but are still underdeveloped

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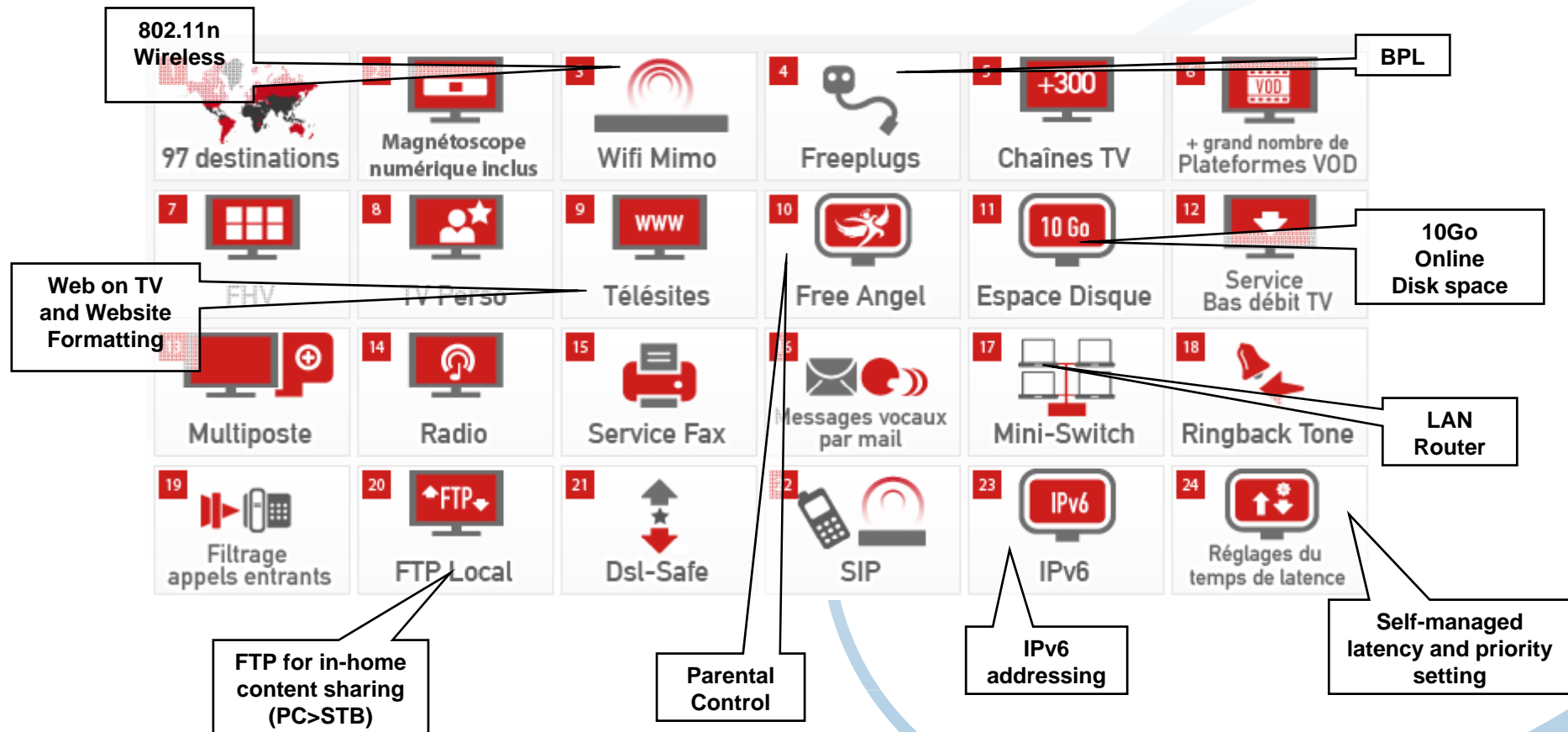


Enabling Services Highlight Free's Rich Environment



free

- Free's bundled offer is constantly upgraded with additional services. Currently, Free boasts 24 services, 9 of which are enabling services.
- These services are not revenue generators, but the richness of the bundle is an acquisition driver in itself.



Enabling Services Highlight HKBN's Service Guarantee



- HKBN offers a retail style payback guarantee for its broadband service.
- Customers can run a test to the Hong Kong Internet Exchange to test the speed of their connection.
- For any day that the result is less than 80% of the nominal bandwidth, daily average fee is reimbursed to the customer's next bill.

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全港獨有「穩定速度保證」，保證bb200、bb100、bb50、bb25和bb10光纖寬頻的上下載速度(由用戶家中牆身插座連接至香港互聯網交換中心 - HKIX)不低於承諾的80%，否則按受影響日數之費用「雙倍奉還」。

建議系統要求

bb10:	Intel Pentium 3 700MHz中央處理器、128MB系統記憶體、Windows98SE(或以上)及10/100M以太網絡卡。
bb25:	Intel Pentium 4 中央處理器、256MB系統記憶體、WindowsXP及10/100M以太網絡卡。
bb50/100:	Intel Pentium 4 中央處理器、512MB系統記憶體、WindowsXP及10/100M以太網絡卡。
bb200:	Intel Pentium 4 3GHz中央處理器、1GB DDR2系統記憶體、SATA 80GB(7200 RPM, 8MB Buffer)硬碟、WindowsXP及100/1000M以太網絡卡。

測試方法：
若客戶認為寬頻速度未達承諾標準，「香港寬頻」會派技術人員前往客戶府上，以特定型號之電腦，為客戶進行上下載速度測試。

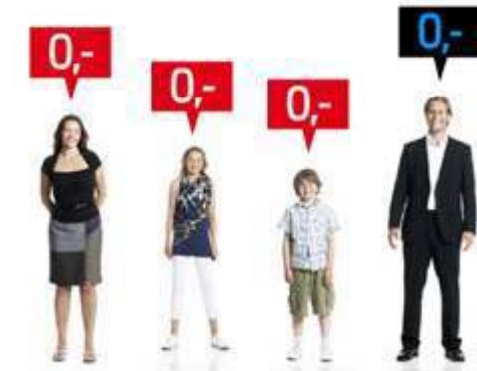
其他注意事項

1. 補償金額將會自動撥至下一期賬單內，不得轉換為現金。
2. 「穩定速度保證」只適用於指定服務計劃。
3. 須受有關補償細則及條款約束。
4. bb200測試方法

***補償細則及條款**



	Altibox Tale	Altibox Kontroll	Altibox SMS	Altibox Kontant
monthly subscription	49NOK	0NOK	0NOK	0NOK
Call Setup	0.59NOK	0.79NOK	0.79NOK	0.79NOK
Per mn	0.59NOK	1.29NOK	0.99NOK	1.29NOK
Per SMS	0.59NOK	0.69NOK	0.39NOK	0.69NOK



Ring gratis i familien

– uansett mobiloperatør

- **Smart Familie** is free for all Altibox mobile phone subscribers. It includes the following features:

- Free calls and SMS between all family phones, fixed and mobile (up to 6 mobile phones in a Family)
- Single family bill

Additional features

- email on mobile (Pay as you Go)
- Mobile voicemail alerts on TV Homescreen
- PVR control from mobile web

Verizon's Interactive Media Guide



- Powerful EPG designed to have no lag and **intuitive navigation**
- Sleek layered look
- Powerful **search functions** that include the DVR and PC in the results
- Movie trailers for VoD
- Embedded **widgets** that display traffic information, weather, etc.



Web2.0 apps on your TV



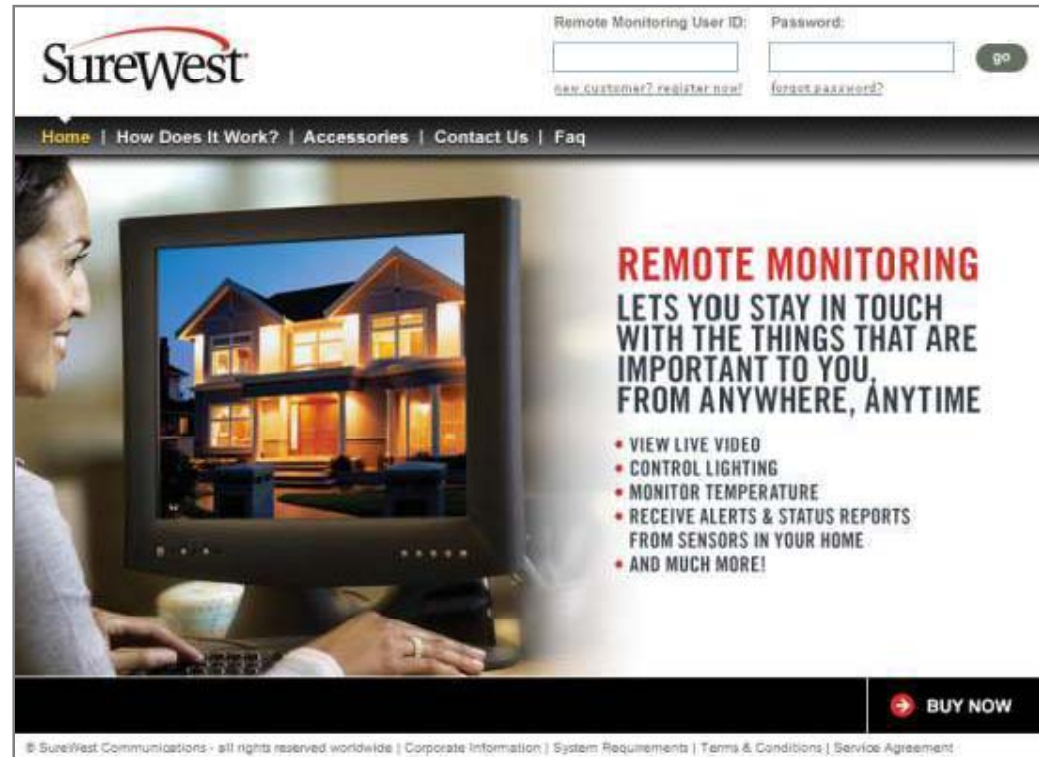
- Users have full access to their Flickr accounts via the TV, allowing them to browse photos and create slideshows



Surewest's Home Security Service



- Surewest is marketing a starter security package that includes an IP camera, a door/window sensor, wireless gateway and software for \$199.
- The company also charges \$9.95 per month or \$105.99 per year for access to a protected web portal that allows to control camera(s) and sensor(s)



Entertainment / Wider Economy Services

NTT's partnership programs



- NTT/Nintendo's partnership is a commercial drive relying on each other's brand for increased penetration.
- Nintendo wants more people to connect their Wii consoles. NTT wants more people connected to its fiber service.
- The main argument of this bundle is phone support to connect the Wii to NTT's fiber service.



- NTT and Tanita (a manufacturer of domestic health equipment like scales and podometers) are co-branding a service which requires a specific set of wireless health equipment designed by Tanita (~300€)
- It then measures weight, walking distances, tension, etc. and feeds into an online service (free for the first two years) by Tanita with monitors, graphs, health recommendations, etc.

