

Euromedia at 10

IN OUR LAST ISSUE, WE ASKED INDUSTRY FRIENDS AND COLLEAGUES TO SHARE THEIR HIGHLIGHTS OF THE LAST 10 YEARS IN THE CONVERGED BROADCAST AND COMMUNICATIONS INDUSTRIES; WE NOW BRING OUR READERS THEIR PREDICTIONS FOR THE NEXT DECADE.

RICHARD SAMBROOK

was director of BBC News from 2001 to 2004, leading the world's biggest broadcast news operation. Prior to that, from 1999 to 2001, he was deputy director of the News division and has worked as a producer and programme editor on the BBC's national TV news programmes.

CURRENT ROLE Director BBC



Global News
1999 Head of Newsgathering, BBC

PREDICTIONS

- IPTV will become established
- Pay models for news online will emerge
- Some substantial sites and organisations will disappear before that happens
- There will have been a significant development in electronic media, which we completely failed to predict!

RICHARD SCOTT was, prior to joining Harris, SVP systems and technology services, EMEA, at broadcast systems integrator Ascent Media. Prior to that, he spent five years as VP and MD, EMEA for Pinnacle Systems, seven years as director at Sony Corporation and eight years as technical director at Panasonic.



suppliers (fewer players per segment)
● Live events with high production values (sports, music, some news) will be the key differentiator and

- source of income for 'TV'
- Multiple content delivery platforms will morph to a hybrid solution where consumers are unaware/not interested in how the content was delivered.
 - 3D will not be universally adopted by consumers for home viewing (but 3D Cinema viewing might grow)
 - Viewer profiling and targeting will lead to much more sophisticated and lucrative advertising/sponsoring

CURRENT ROLE VP, EMEA operations, Harris Broadcast Communications
1999 director of broadcast business, Europe, Sony Broadcast.

PREDICTIONS

- Further consolidation amongst

THE NEXT 10 YEARS?

NEIL GAYDON has well over 20 years experience in the audiovisual industries, and a thorough knowledge of digital



TV, pay-TV and home entertainment industries. Following his appointment to CEO of Pace in April 2006, he instigated a complete company restructure, which has successfully turned Pace into a highly profitable organisation.

CURRENT ROLE CEO, Pace
1999 President, Pace Americas

PREDICTIONS

- HD and hybrid technology will become ubiquitous across all operators' service propositions.
- There will be a growth in targeted advertising as business models begin to emerge.
- Whole-home networking, in which video and entertainment services will be available on any screen in the home.
- Despite the talk of free Internet-based services coming to dominate the TV experience, in reality this will not happen.
- It is inevitable that we will see greater consolidation across the industry.

DR MIKE SHORT has spent 35 years in Electronics and Telecommunications, with the last 21 years in Mobile



Communications. He was appointed Director of Cellnet in 1989 dealing with major infrastructure investments and commercial agreements. He was appointed VP Technology for O2 Group in 2000, prior to demerger from BT.

CURRENT ROLE VP, Telefónica Europe
1999 VP, R+D BT Wireless, and Chairman Mobile Data Association (MDA)

PREDICTIONS

- User experience will accelerate beyond touch screens to voice and sensory activation.
- Growth will move more fully to machine (M2M) connectivity for Automotive/ Consumer devices / healthcare/ and smart metering
- Connection capability to the Internet will accelerate from 5bn today to 15bn by 2015
- Applications served by the web will multiply, whether Education, Entertainment, Health, or Transport.
- Public services will move more slowly onto the web that expected, until inclusion and trust grows.



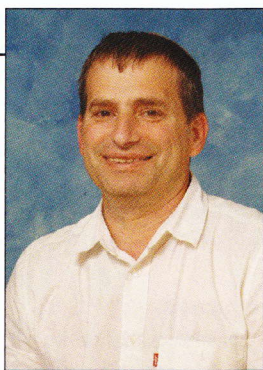


FERDINAND MAIER was appointed MD of ruwido Austria in 1993, where he had already completed his apprenticeship for tool design and construction. An MBO in 2003 changed the ownership of ruwido from Knowles Electronics to Ferdinand Maier.

CURRENT ROLE MD, ruwido
1999 MD, ruwido

PREDICTIONS

- New interaction will allow for new services that are integrated in the future way of living: personalisation and social communication will continue to be key research topics.
- One content – whatever format: Home networks will allow consumption of the same content in a multitude of formats and with a multitude of devices.
- User experience is the new consumer quality attribute.
- Organic haptics: Synchronisation of mind and senses will become key in all kinds of interaction.
- Watching a TV series or a movie will be still watching TV – as a communicative event, a social event or a relaxing event.

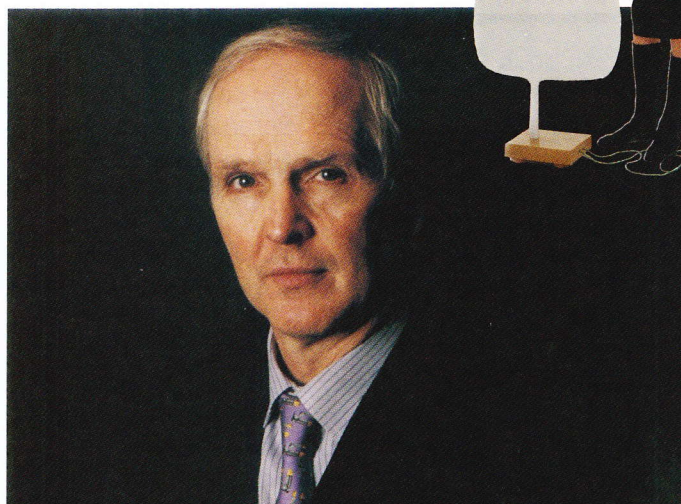


YOSSI TSURIA has worked in the TV industry for the last 20 years and as technical manager at NDS, led the development of the CAP part of the first digital TV system for DirecTV. In 1998, as VP of R&D, he led NDS to become the first company to offer an integrated PVR to its customers.

CURRENT ROLE EVP, strategy and technology, NDS
1999 VP, R&D

PREDICTIONS

- Pay TV will continue to be the dominant way to inform and entertain people
- 3D @ Home: The 3D PVR will enter the market at the same time as 3D Blu-Ray
- The Hybrid PVR (broadcast and broadband) will become mainstream. We will see new formats of programming that involve broadcast & broadband
- Advance User Interfaces: Smart remotes and other tools will enable us to interact more intuitively with our TVs
- The STB/PVR will become part of the Home Network



MARCUS BICKNELL is a consumer marketer in high tech products. He managed Genesis and worked for CBS and A&M Records in the 70s. Founder commercial director of Luxembourg based satellite Astra 1986-1990. In the 90s, he was MD Europe for TV channels BBC World and BBC Prime, and president of CMGI Europe (AltaVista, Geocities, Lycos &c.).

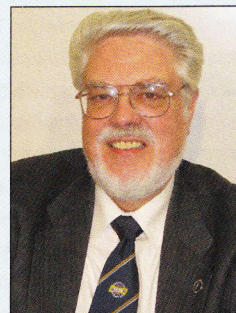
CURRENT ROLE Non-executive director SES, and sales and marketing director of Rainwater Harvesting.co.uk.

1999 President, Europe, CMGI Inc. of Boston

PREDICTIONS

- Commercial success of Sky's 3D TV transmissions
- Internet industry realises that encouraging consumers to watch TV on iPlayer and other video downloads does not have a sustainable business model. Opening an Internet connection individually to every viewer cannot compete with the simplicity of satellite TV (point to multi-point). ISPs impose tariffs that make TV viewing on Internet too expensive.
- Conversely, personalisation technologies applied to store-and-forward TV so that each person always has programmes available which are directly relevant and attractive.
- First investment and operational steps towards the construction of the first space tower as predicted by Arthur C Clarke in 3001

DR ROGER BLAKEWAY was first involved in the cable TV industry in 1983 as technical manager at Racal-Oak responsible for the company's Pay T.V. products and systems.



CURRENT ROLE President SCTE

1999 President SCTE and European Operations Director for DIVA

PREDICTIONS

- Virgin Media divests Network
- 3-D TV
- Failure of DVB-H based business
- Slow take-up of DVB-C2
- Universal 10MB/s broadband

KEVIN MACLELLAN

boasts over 20 years of experience in domestic and international television production, operations and management. Prior to E!, he served as VP, international television networks, at Sony Pictures Television International (SPTI) in London, responsible for handling the company's channel investments in EMEA.



locations such as DVRs, VOD servers, and Internet portals, which will reduce the number of linear networks.

- High speed wireless distribution will emerge as a serious alternative to cable, satellite, and IPTV

- Professional quality entertainment content will be available on-line, but access to the majority of the content will require some kind of subscription or transaction fee

- The number of free to air broadcast networks will diminish as advertising revenues and audience ratings continue to fragment

- Sponsorship will emerge as a significant component of advertising deals and the 30s ad spot will diminish in its importance.

CURRENT ROLE President, Comcast International Media Group
1999 VP, Networks EMEA, Sony Pictures International Television

PREDICTIONS

- The majority of consumers will begin 'pulling' their entertainment choices from

KAY HUTCHISON

is founder and CEO Belle Media. Kay was previously director of partnerships for Red Bee Media. Past roles have included head of presentation at Five and Disney Channel - responsible for the launch of the channels in both cases. Kay spent seven years at Channel 4 and is a past Chair of PromaxUK.



they are no longer cool.

- Big budget broadcast sports rights market will decline dramatically. Next few years will be the high watermark. The 2020 Olympics will not attract anything like the revenues agreed for London

CURRENT ROLE CEO Belle Media Ltd

1999 Head of Presentation, Channel 5 Broadcasting

PREDICTIONS

- Social networking sites will decline in popularity- kids know

2012.

- Premier League Rights will be sold on a 'club by club' basis, because the bigger clubs wanting to control their own rights and regulatory pressures.

- Mobile video will soon be commissioning its own 'must see', exclusive, programming.

- 3DTV will succeed (driven by sports and 3D original films), but it will not replace conventional flat screen HD.

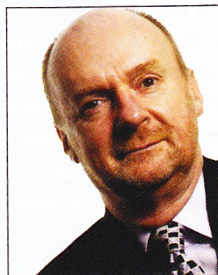
ROGER BOLTON heads Tandberg Television's compression business, as EVP of Compression Systems, Tandberg Television.

CURRENT ROLE EVP of Compression Systems, Tandberg Television
1999: manager, Internet business

solutions division, APW.

PREDICTIONS

- The migration towards an all-HD television universe.
- The trend towards higher quality HD to



match rising consumer expectations for detail and clarity.

- The forthcoming migration from MPEG-2 to MPEG-4 AVC compression in the Contribution and Distribution market

will greatly reduce the bandwidth and costs.

- The continuing migration from MPEG-2 to MPEG-4 compression for transmission networks, which will support the push towards all-HD television.

- The powerful trend towards a more Individual TV Experience.



GRAHAM KILL joined Irdeto as CFO and operations director in 1995. He assumed the position of Chief Executive Officer of Irdeto in 1998. Previously he'd held management positions at USC, British Gypsum and the British Coal Corporation. Prior to joining Irdeto, Graham worked for the FilmNet (later NetHold) Group in corporate finance and business development focused on pay TV business development, acquisitions and financing.

CURRENT ROLE CEO, Irdeto
1999: CEO, Irdeto

PREDICTIONS

- Broadband: The march of

broadband continues unabated even during this recession. This is driven by digital switchovers, but probably more importantly consumer demand to match access with their changing consumption requirements.

- Monetisation: The tension between rights holders wanting to maximise value and develop new and predictable revenue streams, and consumers wanting flexibility and fairness in their consumption will continue to rage as each new



offering comes to market.

- Eastern Hemisphere rise in prominence: Whether it is technology, trade, culture, politics, etc., it will increasingly be the Eastern Hemisphere's decade.

This rise will dominate every aspect of our industry to some extent in the next decade.

- Digital Switchover: Despite previous delays to stated objectives, and I am sure delays to come, there will be a significant number of major economies that are all digital in the next decade.

This presents a huge opportunity for all in the industry and a duty to find solutions for bringing those 'digitally less advantaged countries' into the digital world as quickly as possible as it will be a key for people to improve their lives in those countries.

- Competition: As network access (of whatever flavour) becomes more ubiquitous and as a consequence content less associated with one form of delivery in particular, competition for the two key aspects for the industry to focus on will heighten even more than today. Those two aspects are the consumer's time and spend.