ansition from analogue to digital tv:

a revolution for a

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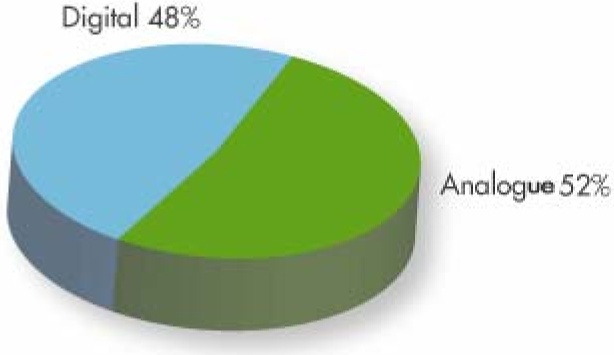
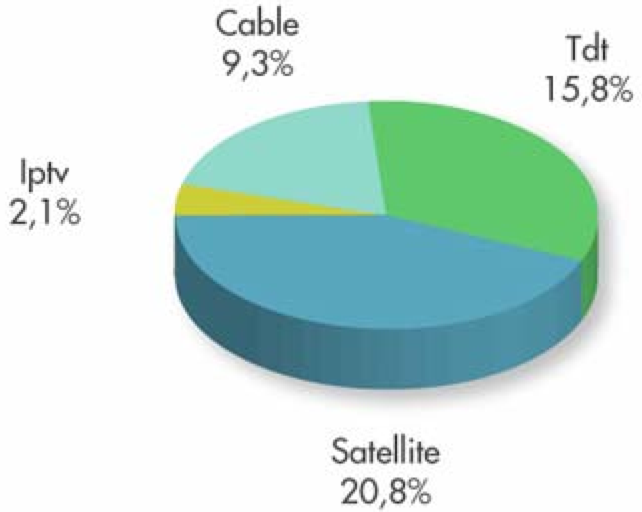
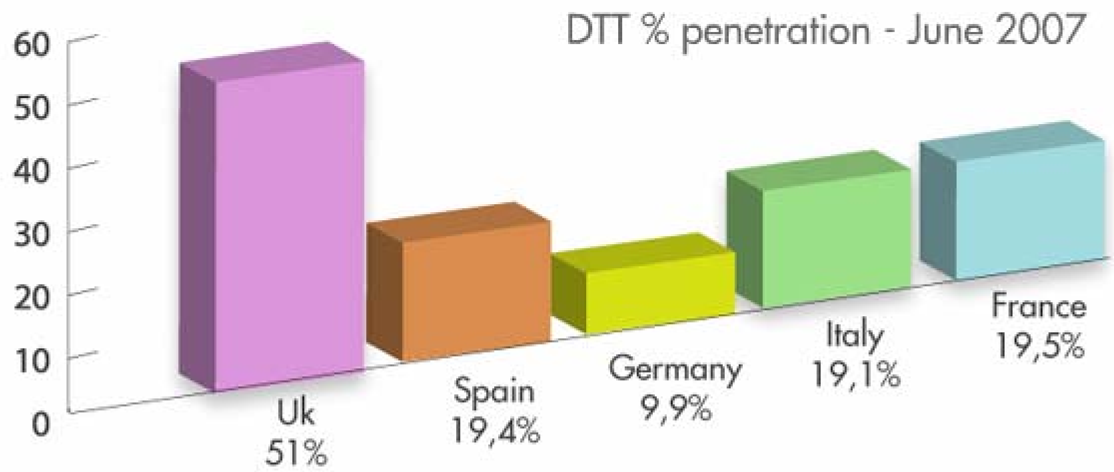
2007: for the first time the diffusion of the Digital TV in Europe reached the analogue TV





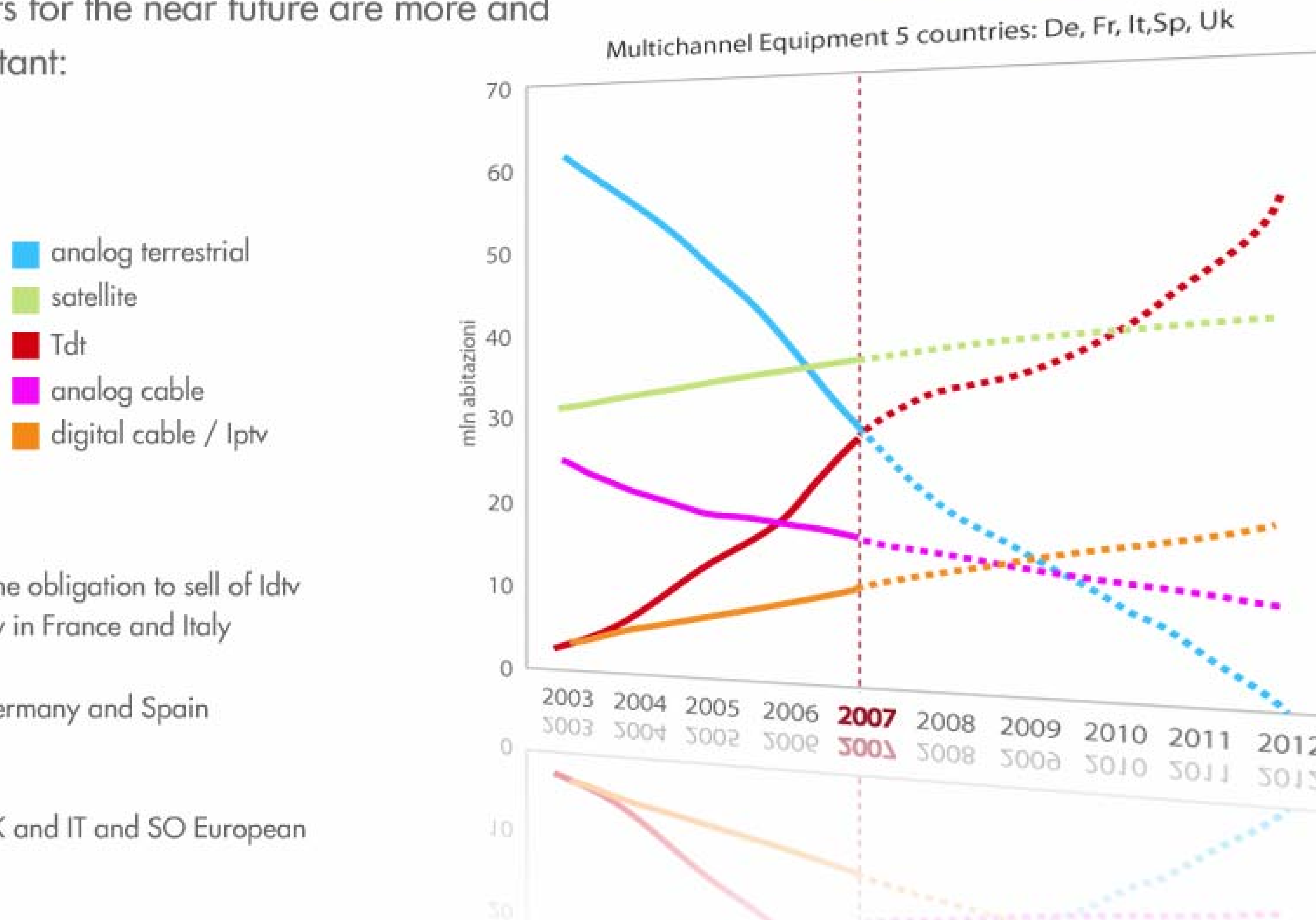
Only in 2005 the digital TV was in a third of the European houses and now a family on two accesses to TV only through the digital!

2007: for the first time the diffusion of the Digital TV in Europe reached the analogue TV



DTT is the first digital platform in UK, in France and almost in Italy in every countries have an annual growth between 20% and 30%

The forecasts for the near future are more and more important:



2009 Started the obligation to sell of Idtv and Hdtv in France and Italy

2010 SO in Germany and Spain

2012 SO in UK and IT and SO European

- at the end of this year the dtt will exceed the diffusion of analogue television;

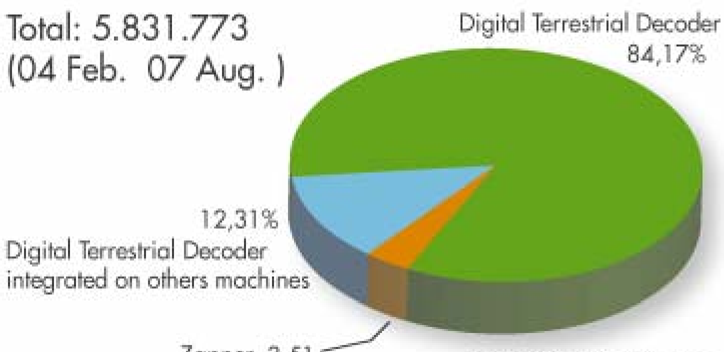
- within three years the dtt will be the television platform most diffuse in Europe outclassing also the satellite;

- within five years the dtt will be the European universal tv platform. This makes end of analogue tv.

The tv revolution has arrived by now and concerns everybody!

The Italian position

Leaving from the current dtt diffusion – about the 20% of population (one family on five) - and from the obligation to introduce tuner dtt in the television devices (ratify by the 2007 Financial law) **Italy can reach the English diffusion (50%) in the next two years.**



Reference: Report DGTVi August 07.

The Italian road to digital market is still described by **big strength points** and also **many weakness points.**

The strength points of the Italian way in dtt market

A strong impulse for all digital areas

Switch off:

Sardinia region (2008 March)

Valle d'Aosta region (2008 October)

Piedmont region (2009 March)

This event will involve about three million of Italians in the next eighteen months and they will receive the tv only in digital standard.

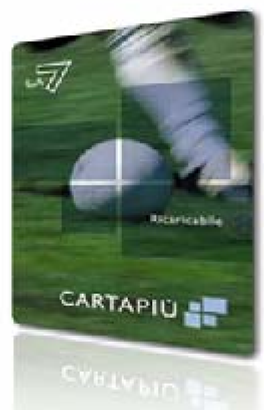
The strength points of the Italian way in dtt market

A great penetration (more than 96%) of digital receivers with Mhp standard and a very basic zapper diffusion.
The tv does not repeat the traditional programs but it can become a powerful tool for new services.

powered by: mhp

The strength points of the Italian way in dtt market

The offer of services in **pay for view** (regarding 1,5/2 million of users) opens **new perspectives of growth** for the operators and new chance for the users.



Pangea
Multi Operator Platform DTT

The weakness points of the Italian way in dtt market

An institutional situation with few certainties.
The continuous postponement of the switch-off date creates insecurities in the market (operators, investors and users)

The weakness points of the Italian way in dtt market

The offer of free channels it's not yet too strong.
The digital terrestrial audiences isn't yet much diffused (**3% of share**) and few are the advertising investments.

Following these strengths and weaknesses the Italian broadcasters participate to the third national **conference on DTT in Turin on the next November 30** and December 1 to ask to the Government and the operators a renewed engagement for the development of the dtt in Italy.

The challenges for the broadcasters

New offers: a multiplication of channels (from 8/10 to 30 channels only in Italy)

the traditional broadcasters will have to create new channels...

and to measure its with new publishers

Mobile Video Company

The challenges for the broadcasters

New digital services and technological innovations

The broadcasters should be able to create new services for the users

CONSORZIO**SARDEGNA**DIGITALE CONSORZIO**VALLED'AOSTA**DIGITALE

and do not miss the new technological chance.

DVB H HANDHELD HD

The changes for the users

The arrival of digital tv doesn’t mean only a better quality and more channels for consumers

it's also a not passive use within few channels

but it's a more aware choice for many contents

EPG

The changes for the users

A different use of the tv through the new potentialities of the digital standard for

Entertainment

The changes for the users

A different use of the tv through the new potentialities of the digital standard for

Information

The changes for the users

A different use of the tv through the new potentialities of the digital standard for

Purchases or reservations

The changes for the users

A different use of the tv through the new potentialities of the digital standard for

T-training

The changes for the users

This is the focal point:

We should be in a position to develop the interactive potentialities of the digital tv.

If the TV stays just a simple instrument to broad programs, we will get lost this not repeat occasion in order to introduce the extraordinary potentialities of the digital for million European families.

Conclusions

The role of the great tv social impact involves some reflections behind to this revolution

Two questions regarding the multiplication of the services and the channels.

1) Which role for the European public tv?
2) Does exists a new concept of universal television service?

Conclusions

Two certainties

1) The dtt it is the only instrument capable to not classify the Tv in series A (strong pay content) for rich people and series B (poor free content) for who cannot have other choices.

2) The dtt it is the only instrument in order to conserve - in the total revolution of Media - the decisive role of the tv in informing, in entertaining and in educating.

Conclusions

DTT it's a challenge and a revolution for all: broadcasters, governments and citizens. It's the most diffused media to enter in the digital age and it can support million of customers in the new context (also who does not have or who will never have Internet).

It's one challenge for all but also an obligation for all

to support

to accompany

to make growth this process.