



# CONVERGENCE

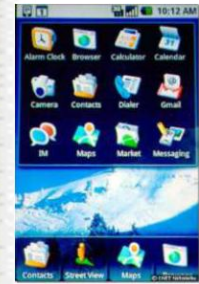
**DIGITAL CONTENT &**

**THE MEDIA OF THE FUTURE**

Global Forum – Shaping the Future

Bucharest October 19-20, 2009

# Convergence in TV / Video is a reality ...



# 3 business models



### Boadcasters

Distribution Management

5 K€ / 30''

### Telco IPTV

services management

IP

and ks

€ 30 / mth

### Web TV

Web Services

Middleware

IP

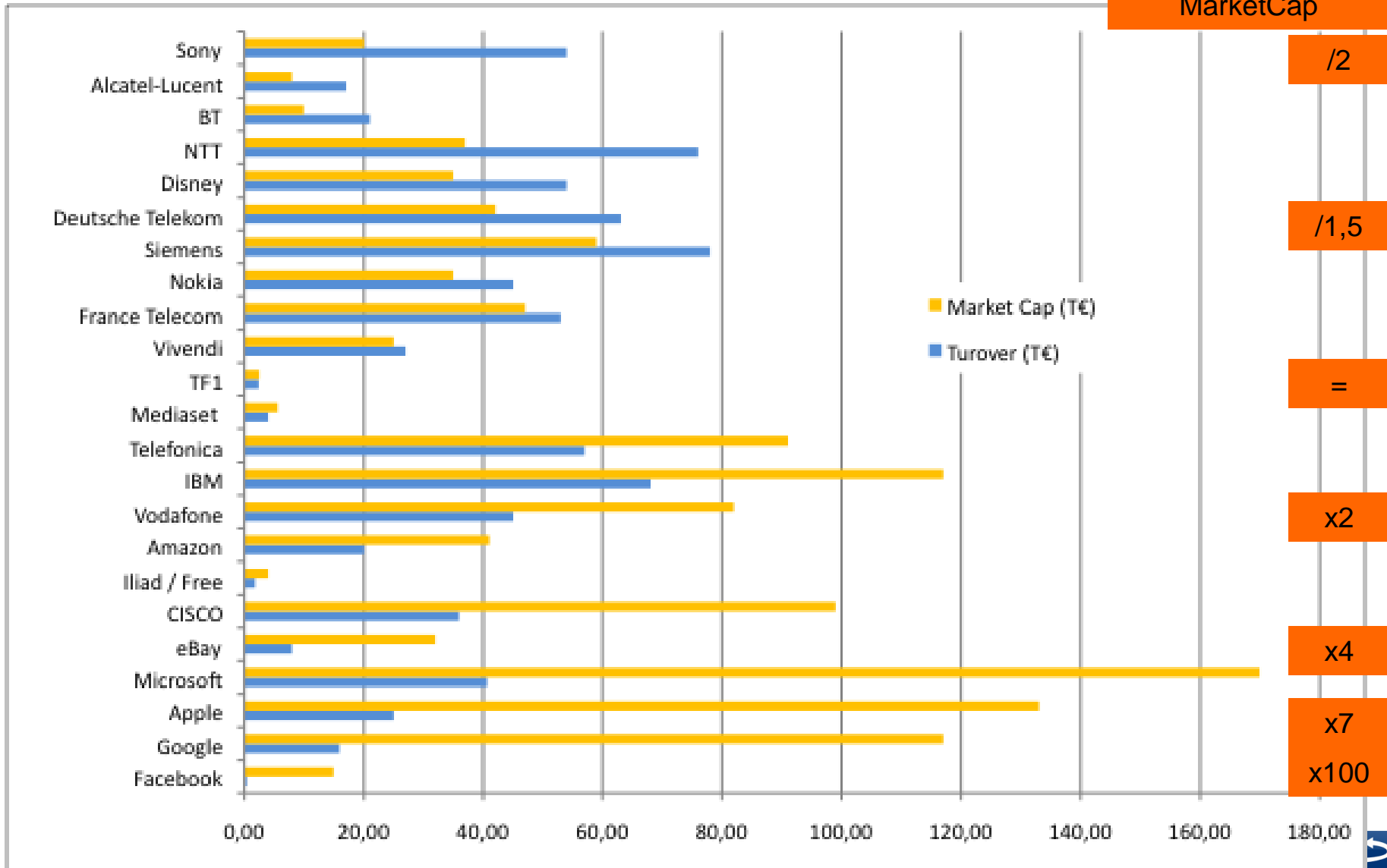
Broadband Networks

€ 0,2 / click  
€ 10 / m

(x100)

□ “Software mind” players lead the game

And the winner is ...



## Challenges for the next future

Revolution in advertising market

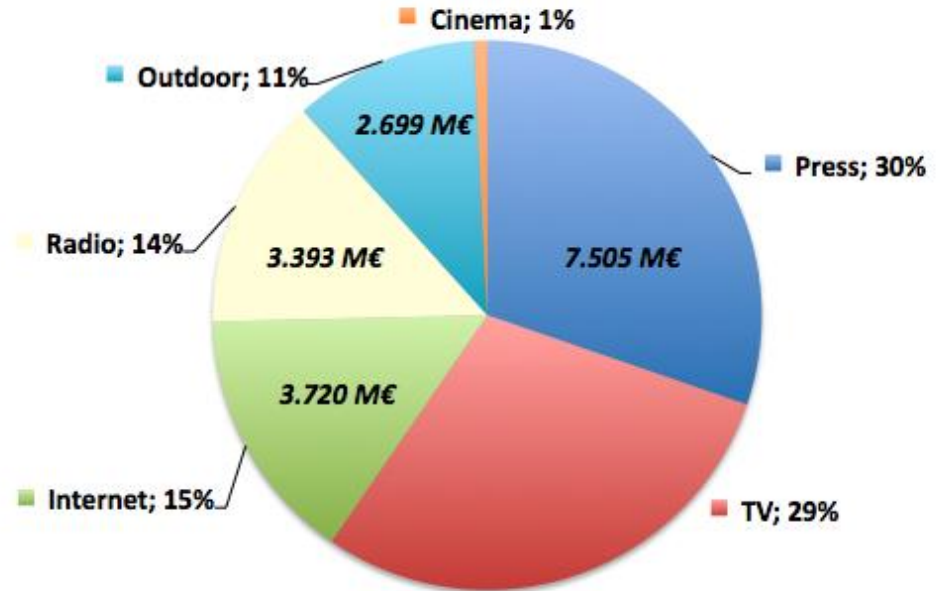


THIS IS THE NEW **300G** BY CHRYSLER

A car that beats its own blood. The 300G... the 2001 version of Chrysler's championship breed of exotica. A car that can take its well-proportioned belt and go record-breaking at Daytona Beach. The rare American that's turned out one at a time; a few thousand times a year. You'll find this tiger powered by the latest in Chrysler's brilliantly engineered race-injection V-8s. With a full 275 horsepower that you manage with incredible ease. Power brakes and steering help. But the real clue to the "G" branding comes in its superbly balanced suspension. Concessions are complete. Comfort is served in typical 300 style: four leather-lined, hand-padded bucket seats. This is a total machine. The one that can tour confidently with the best automobile the world has to offer. The 300G... a rare kind of car for a rare kind of man.

Found in Mom's Basement

## Advertising



French advertising market - 2008 - TNS Media Intelligence

- At the end of 2009
  - TV Revenues < Internet revenues
  - Google: #55% of the Internet Ad revenues market share

## Challenges for the next futures

Developing more service needs interoperability



- Interoperability
  - 3G: #7000 third applications devevelopped in 7 years works & works in 3GPP
  - Apple: 70.000 third applications in 1 year
  - Google: xxxx applications working with Google API
    - Google Maps
    - YouTube
  
- Broadcaster, Telco, Internet players, Device vendors:
  - Interested by interoperability
  - ... but want to control and CONTROL
  
- More SOFTWARE MIND need in standardization organizations
- MCD: Interesting initiative from ETSI

# Control the box to CONTROL THE USER ...

Who is going to control ?



**Consumer Electronic**



**Games Platforms**



**IT**

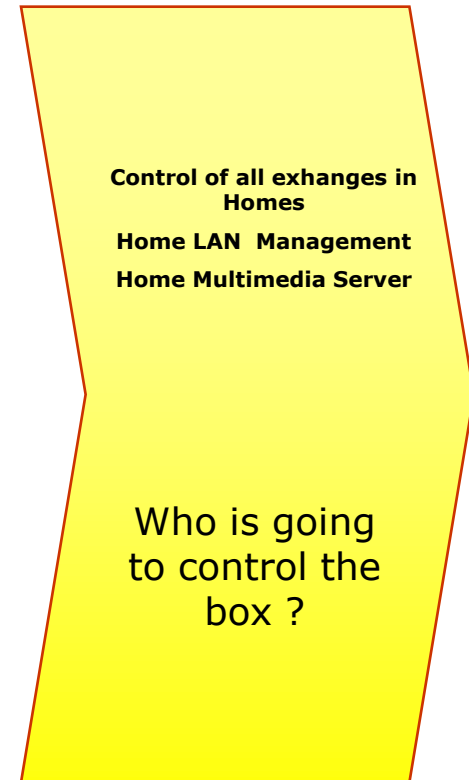
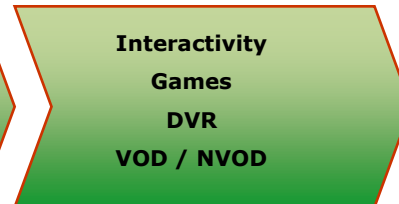
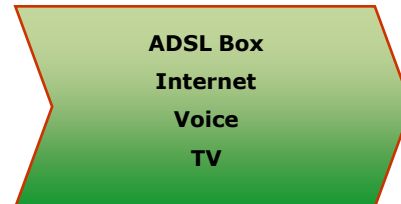


**Telcos**

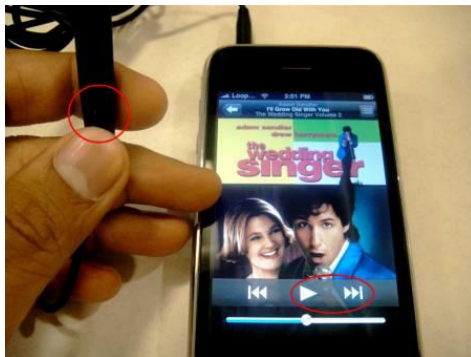
**Today**

**Next**


**Next**



... or  
control the service  
control the user







## Contents

The Gordian node

### □ Tomorrow : Who is going to pay?

#### – TV broadcaster?

- But ... face to decreasing incomes

#### – Mobile Operators?

- But ... interested by specific contents

#### – Fix operators?

- But ... face to tremendous investments in fibre optic infrastructures

#### – Internet players

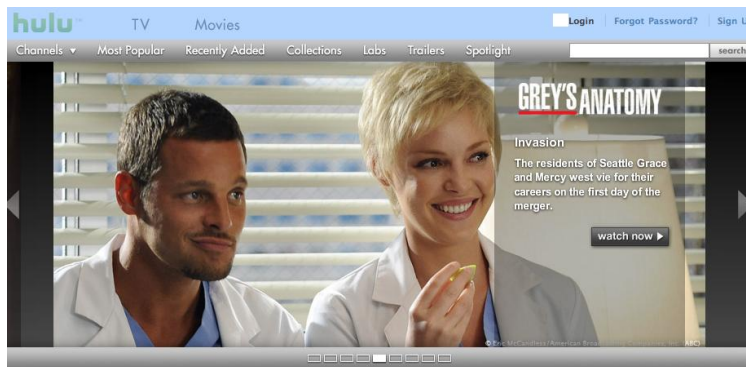
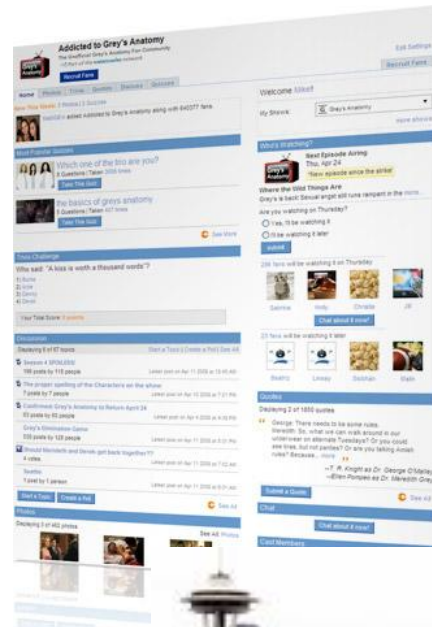
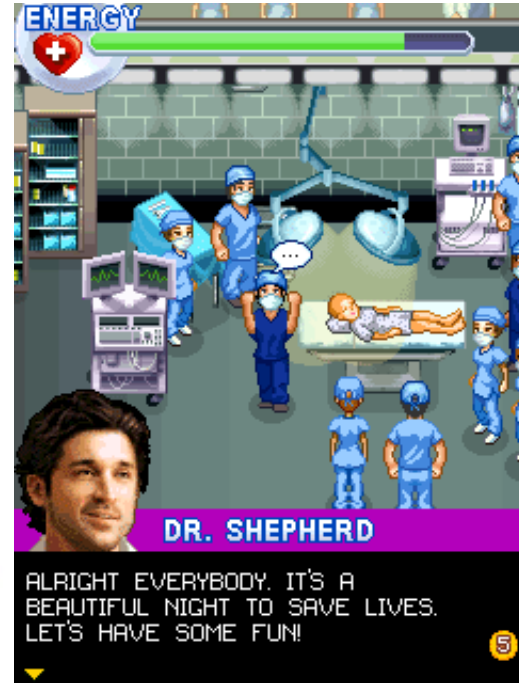
- But ... they play in a no-frontier playground

### □ Control Rights ?

#### – How to control them ?

# Towards Global Media Merchandising

- TV,
- WebTV,
- DVD
- Games
- Mobile
- Communities



## Contact

- FUTURE TV  
November 9-10  
PARIS  
[www.futuretv2009.com](http://www.futuretv2009.com)



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