



EXPECTED SPEAKERS

FUTURE TV

ORGANIZED BY

CAP DIGITAL - IMAGES & RESEAUX – NEM - FICAM

SPECIAL GUEST COUNTRY: JAPAN

NOVEMBER 9 & 10, 2009

PARIS, FRANCE

www.futuretv2009.eu (English)

www.futuretv2009.org (French)



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CONFERENCE SCOPE

Television at the crossroads

Digital Television has proved a real success in all countries. The old analogue signal is generally planned to be switched-off by 2012. In the US, the transition from analogue to digital will be completed in 2009. In France, digital switch-over is scheduled for 2011.

Audience share for the free French DTT newcomer channels almost doubled in 2008, while the traditional TV channels fell back. The audience share of traditional terrestrial TV channels decreased from 86% in 2006 to less than 74% at the end of 2008.

High Definition broadcasting is expanding steadily in all OECD countries. Leaders like Japan and Korea already switched to HD with 50% of the installed basis. In Europe, these changes are expected for 2010 (and 70% for 2012).

Internet TV shakes up traditional TV channels and their business models: Video sharing websites like YouTube and DailyMotion have experienced explosive growth in recent years. Everyday, 100 million users are watching videos on YouTube, which corresponds to 3 billion watched videos each month.

Telecom operators are rolling out more and more IPTV services. Up to now, cooperation between players was well-regulated. However, relationships between telcos and broadcasters are becoming more and more competitive – especially, when telecom operators are delivering Video-on-Demand services through their networks or when acquiring sports rights or other premium programs.

Mobile TV uptake in Europe is rather slow. The main reason is the need to finance a new network infrastructure without having the right business model for coming and unknown markets. The Japanese mobile TV market is currently the most active in the world due to the fact that no investment is required to launch the new services.

The *production chain* undergoes a considerable transformation especially with decreasing costs facilitating market entry for low cost and non professional products, as well as with user generated content.

The *protection of Intellectual Property Rights* through general and common control mechanisms is not yet functional nor legitimate.

Joining Forces: Future TV, a major event under the patronage of the French business clusters Cap Digital and Images & Réseaux

Future TV, an international event for players in the TV market, takes place on 9 & 10 November in the continuity of the Summer festival of the Digital City "Futur en Seine" in Paris. Future TV is jointly organized by the French business clusters Cap Digital and Images & Réseaux. The two clusters work in complementary fields:

The Cap Digital cluster, operating in the Greater Paris Region, focuses on developing the digital content industries. The Images & Réseaux cluster for in the Brittany and Pays-de-la-Loire regions is specializing in digital content and content distribution via fixed and mobile networks.

The conference, with Japan as a special guest country, aims at providing a forum for stakeholders along the entire value chain in order to discuss state-of-the-art developments, economic and technological challenges as well as opportunities emerging from the transforming television market.

The programme committee is chaired by Janine Langlois-Glandier, chairwoman of the Mobile TV Forum and an important personality of the French audiovisual scene. She has been president of the French TV Channel France 3 and the National Audiovisual Institute INA, and managed the film company Pathé and Pathé Interactive.

Convergence, new business models and new market players, multi-channel services, rich media contents, regulations... The two-day event full of debates, networking and business meetings intends to promote a high-quality debate among main players of the marketplace, and to encourage collaboration between players and business clusters.



PROGRAMME OVERVIEW

Conference Eve	Welcome Cocktail	
November 9 AM	- Opening Session -	
	- The effect of distribution channel diversification (broadcasting, telecom, mobile, Internet) on the same value chain -	
November 9 PM	- Regulation: between neutrality and market stimulation -	- Mobile TV: How to unlock the Gordian knot in Europe? -
	- The battle of service platforms -	- Standardization as strategy for an open TV model ... or a closed one -
November 10 AM	- Producers looking for new balances in the light of convergence effects - Keynotes -	
	- The major evolutions of the coming years (IPTV, HDTV, 3D, Widgets, Green TV, etc.) -	- The future of TV advertising -
November 10 PM	- New forms of content production -	- Radio & press going towards TV? -
	- Closing Session -	

PROGRAMME COMMITTEE

CHAired BY JANINE LANGLOIS-GLANDIER, PRESIDENT OF FORUM TV MOBILE

- MALIKA AÏT GHERBI, DIRECTOR, NORTH PARISIAN MULTIMEDIA CLUSTER, FRANCE
- GUILLAUME BLANCHOT, DIRECTEUR DU MULTIMEDIA ET DES INDUSTRIES TECHNIQUES, CENTRE NATIONAL DE CINEMATOGRAPHIE
- ALAIN CHAPTAL, DIRECTEUR, PLATE-FORME ARTS, SCIENCES ET TECHNOLOGIES
- DOMINIQUE DELPORT, CEO, HAVAS MEDIA
- RENAUD DI FRANCESCO, GENERAL MANAGER EUROPE TECHNOLOGY STANDARDS OFFICE, SONY
- MARGOT DOR, ETSI, MEDIA CONTENT DISTRIBUTION, VP STRATEGY
- VINCENT MARCATTE, IMAGES & RESEAUX, PRESIDENT
- STÉPHANE MARTIN, DIRECTEUR DÉLÉGUÉ, SNPTV
- JEAN-DOMINIQUE MEUNIER, EXECUTIVE DIRECTOR, NEM
- FREDERIQUE SITTERLE, FOUNDER & PRESIDENT OF SKREEN-HOUSE FACTORY, FRANCE
- MAKOTO YOKOZAWA, PROFESSOR, NOMURA RESEARCH INSTITUTE, KYOTO UNIVERSITY, JAPAN
- HENRI VERDIER, PRESIDENT, CAP DIGITAL

IN COOPERATION WITH

- KAN'ICHIRO ARITOMI, PRESIDENT, FOUNDATION FOR MULTIMEDIA COMMUNICATIONS, FMCC, JAPAN

PROGRAM COORDINATION: HADMUT HOLKEN, HOLKEN CONSULTANTS & PARTNERS

(* to be confirmed

Morning: 9.30 a.m. – 12.30 p.m.

- **Conference Presenter: Jean-Bernard Magescas**, French Connection/LCI, France

- **Conference Opening**
9.30 a.m. – 10.30 a.m.

Conference Opening

- **Henri Verdier**, President, Cap Digital
- **Jean-Louis Missika**, Deputy Mayor of Paris in charge of Innovation, Research & Higher Education
- **Janine Langlois-Glandier**, President, Forum TV Mobile, France

Keynote Speaker

- **Kan'ichiro Aritomi**, President, Foundation for MultiMedia Communications FMMC, Japan

- **Session 1 (Plenary): The effect of distribution channel diversification (broadcasting, cable, telecom, mobile, Internet) on the same value chain**
10.45 a.m. – 12.30 p.m.

- Economic and financial crisis as accelerator of change for the audiovisual value chain?
- Fragmentation and hyperchoice in the audiovisual offering
- Impact of technological changes on the players' strategic visions and positioning
- TV and video content : The evolution of interactions between content providers, distribution platforms and editors/broadcasters
- TV and Telecom Regulators under pressure
- Financing digital content: who is going to pay?

Chairman: Anicet Mbida, Journalist, NextradioTV Group, France

Keynote Speakers:

- **François Guilbeau**, General Manager, France2
- **Jay Kishigami**, VP Corporate & Head of IPTV Development NTT, Japan
- **Markus Fritz**, VP & General Manger, SES ASTRA, Luxembourg
- **Jean-Dominique Meunier**, Executive Director, NEM Networked Electronic Media
- **Michel Sharpe**, Vice President, Standardization Projects, ETSI
- **Bernard Pauchon**, Chairman of Task Force on Digital Dividend and Future of Digital TV Platform, DigiTAG, Switzerland & VP Global Media, TDF, France
- **Charles Juster**, Executive Communications Director, Médiamétrie, France

Parallel Sessions – Afternoon – Part I – 2.15 p.m. – 3.45 p.m.

- **Session 2A: Regulation: between neutrality and market stimulation**

- Regulating TV of the future: challenges between infrastructure issues and content policy
- TV and telecommunications regulators in Europe: merging or coexisting?
- The Digital Dividend agenda
- What to expect from the “TV without frontier” directive?
- The concept of net neutrality: Impact on regulating the television of the future

- **Session 2B: Mobile TV: How to unlock the Gordian knot in Europe?**

- Austria as the best example in Europe?
- Lessons learnt from advanced services in Japan and Korea
- The first global European initiative: What to expect from the launch of MSS (Mobile Satellite Services)?
- Telcos: Invest now or awaiting the evolution of mobile technologies
- Regulatory framework and business models: keys for developing the mobile TV market



Round table

Keynote Speaker: Emmanuel Gabla, Board Member, Chair of New Audiovisual Services, **CSA**, France

Chairman: Tom Togsverd, CEO, ITEK
Confederations of **Danish IT Industries**

Speakers:

- **Andreas Röver**, Administrator DG INFSO, Digital Broadcasting, **European Commission**
- **Makoto Yokozawa**, Professor, Normura Research Institute, **Kyoto University**, Japan
- **Pascal Rogard**, CEO, **SACD**, France
- **Rémy Fekete**, Lawyer, **Gide Loyrette Nouel**, France
- **Guillermo Jenefes**, National Senator of Argentina & President of the Committee of Communications and Freedom of Expression

Round table

Keynote Speaker:

Toru Sano, Development Director, NTV - **Nippon Television Network Corporation**, Japan

Chairman: Jamal Henni, Journalist, La Tribune

Speakers:

- **Claus Sattler**, Executive Director, Broadcast Mobile Convention, **BMCOForum**, Germany
- **Serge Ferré**, Vice President, Head EU Representative Office, **Nokia**, Belgium
- **Chem Assayag**, Head of Business Development, **MediaFLO Technologies**, **Qualcomm Europe**
- **Philippe de Cuetos**, Marketing Manager, **Expway**, France
- **Jean-Luc Jaquier**, VP Mobile TV, **Nagravision**, Switzerland
- **Gérard Faria**, CEO, **Teamcast**, France
- **Vincent Grivet**, Vice-President, Mobile TV, **TDF**, France

Parallel Sessions – Afternoon – Part II – 4.00 p.m. – 5.30 p.m.

■ Session 3A: The battle of service platforms

- Which strategy for the development of consumer services? Controlling the set-top box, the service, or both?
- Content delivery platform: the race to attract customers and to build customer loyalty
- Digital Rights Management: Lessons learnt from the music model
- The acTVila model in Japan: The new competition of TV equipment suppliers in the race for service delivery
- Participative content platforms looking for a delicate financial balance
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Round table

Keynote Speaker:

Gilles Fontaine, Deputy General Manager, **Idate**, France

Chairman: Philippe Bouquillion, Professor at Paris 8 University and associate director of **OMIC** (Observatory for changes in cultural industries)

Speakers:

- **Jim Beveridge**, Director Broadcast and Broadband Policy EMEA, **Microsoft TV**
- **Satoshi Miyaji**, Manager FMBC Network Planning Department, Technology Division, **KDDI Corporation**, Japan
- **Antoine Simkine**, Film Producer, **Les Films d'Antoine**, France
- **Tahar Cherif**, VP Corporate, **Sharp**, Japan

(*) to be confirmed

■ Session 3B: Standardization as strategy for an open TV model ... or a closed one

- TV industry players looking for global standards to save costs
- What after MHP, IMS: are the big standards dead?
- Internet culture as a vector of change
- Regional standards versus technology neutrality
- How to conciliate the interests of manufacturers and broadcasters with regard to the rightful owners?
- Standards: the Japanese example

Round table

- **Keynote Speaker: Franklin Selgert**, Innovation Manager, **KPN**, Netherlands

Chairman: David Cutts, Managing Director, **Strategy & Technology**, United Kingdom

Speakers:

- **Margot Dor**, Director strategic projects, **ETSI**, France
- **Klaus Illgner**, Managing Director, **IRT**, Germany
- **Régis Saint Girons**, President, **Open TV Europe**
- **Julien Maisonneuve**, Standardisation Manager, **Alcatel-Lucent**, France



- **Bernard Fontaine**, Innovation & Technology Director, **France Televisions**, France
- **Xavier Brachet**, Responsible for Dematerialization, **FICAM**, France

Evening: Social networking event - 8.00 p.m. – 11.00 p.m.

Theatre of the Espace Pierre Cardin

■ **Special Event with Jean-Pierre Mocky, French Cinema Director, Actor, Screenwriter and Producer**

Preview screening of three short films (all films subtitled in English):

- "Meurtre entre amis" with Victoria Abril and Dominique Lavanant
- "Martha" with Mathieu Demy and Virginie Ledoyen
- "De quoi mourir de rire" with Louise Monot and Philippe Chevalier

Jean-Pierre Mocky will be present and welcome main actresses and actors.

■ **Cocktail**

TUESDAY, NOVEMBER 10

Morning

■ **Session 4 (Plenary): Producers looking for new balances in the light of convergence effects**

09.00 a.m. – 10.30 a.m.

- The audiovisual sector as revival and booster of the overall economy?
- The impact of the multiplication of diffusion channels on production costs
- The position of telecom operators in the production financing chain
- Traditional media windows under pressure
- Videos and right-owners facing Internet piracy
- A comparison of the evolution of financing & investments in Europe, the United States and Japan

Opening :

- **Christine BALIAN**, Director Industrial Development Division, DRIRE Ile-de-France, **French Ministry of Industry**

Keynote Speakers:

- **Bernard Heger**, **Digitaleurope**, & General Delegate, **Simavelec**, France
- **Serge Foucher**, Executive Vice-President, **Sony Europe**
- **Matteo Maggiore**, Group Controller International Policy, **BBC**, UK
- **Jacques Peskine**, General Delegate, **USPA**, France
- **Simone Harari**, Producer & President of **Effervescence**, France

Chairman : Peter Garland, Publisher & CEO, **The Future.tv**, United Kingdom



Parallel Sessions – 10.45 a.m. – 12.15 p.m.

■ **Session 5A: The major evolutions of the coming years (IPTV, HDTV, 3D, Widgets, Green TV, DVB-T2, etc.)**

- Innovation as investment accelerator
- The trump card of satellite in HDTV and mobile TV
- IPTV at the core of the real take-off of interactive television
- Does 3D shift towards a mass market?
- Will Internet actors focus on the market of teenagers?
- Very high speed broadband looking for revenues from the content market to justify deployment investments
- Energy, materials ...: innovation in the service of sustainable television

Round table

Chairman: Pierre Alexandre, Founder & President, NYFP LLC, USA

Speakers:

- **Jean-Pierre Lacotte**, President, **HD Forum**, France
- **Sven Reuter**, Representative for Standards, **LG Technology Center Europe**, Germany
- **Keiya Motohashi**, Senior Strategist, Digital Services, Corporate Planning Bureau, **NHK**, Japan
- **Francisco Medeiros**, Principal Scientific Officer, Networked Media Systems Unit, Information Society and Media Directorate General, **European Commission**
- **Tun Van Rijswijck**, Chief Operation Officer, with **Sascha Quillet**, IT Engineer R&D, **Broadcasting Center Europe**, Luxembourg
- **Yohann Couvreur**, Research Programme Manager, Content Distribution, **Orange Labs**, France
- **Mathias Hautefort**, President & CEO, **Pace France**

■ **Session 5B: The Future of TV Advertising**

- Hyperchoice and multi-channel strategy: opportunity or nightmare for the consumer and for the advertiser?
- New priorities for one-to-one marketing and advertising
- Does the increase of Internet TV users reduce the “available human brain time”?
- Adapting advertising sales models to the different distribution channels
- Internet and its business models: which transfer towards the TV model?

Round table

Keynote Speaker: Sébastien Danet, President and CEO, Zenith Multimedia, Publicis Group

Chairman: Rodrigo Sepulveda Schulz, Journalist

Speakers:

- **Stéphane Martin**, Delegate Director, **SNPTV**, France
- **Etienne Gaillard**, Product Design Manager, **NDS**, France
- **Sylvain Delteil**, Responsible for the Media Sector & Development of videos, Web and Mobile Markets, **Adobe France**
- **Philippe Boutron**, Media Director, **Citroën**, France
- **Albert Asséraf**, Vice President Strategy Research Marketing, **JCDecaux**, France



Parallel Sessions – Afternoon – 2.00 p.m. – 3.30 p.m.

■ **Session 6A: New forms of content production**

- Cross media content: necessary new approach or extension of existing content and merchandising?
- Sustainable development within the production chain
- Traditional TV facing new TV channels and interactive communication services
- Who pays for Cultural Content compared to (interactive) entertainment or services?
- Co-petition between TV show games and videogames
- Advertisers and brands as future TV channels?

Round table

Keynote Speaker: Guillaume Blanchot,
Multimedia & New Media Director, CNC,
France

Chairman: Elizabeth Markevitch, Founder,
Ikono.tv, Germany

Keynote Speaker: tbd

Speakers:

- **Olivier René Veillon**, General Manager, **Ile-de-France Film Commission**, France
- **Martin Rogard**, Director France **DailyMotion**,
- **Rémy Bommelaer**, President, **VCF**, France
- **Rhiannon Hobbins Hillier**, TV Producer, **Zs2 Creative**, France
- **Gilles Babinet**, Chairman & Co-founder, **Eyeka**, France

■ **Session 6B: Radio, press & User Generated Content going towards TV?**

- Brain-teaser of frontiers between music, radio, mobile & TV
- Different European approaches: Digital radio case study of Norway, France, Germany, UK
- Business models for multi-standard digital receivers - DAB+/DMB/DRM
- How to succeed in digital environments without losing traditional markets?
- Which new contents through *video* and *interactivity* for music, radio & press?
- How to save costs and introduce new business models in changing markets?

Round table

Keynote Speaker: Benoît Raphaël, Editor-in-Chief, **lepost.fr**, **Le Monde interactif**

Chairman: Jean-Bernard Magescas, French Connection/LCI, France

Speakers :

- **Alain Weill**, President, **NextradioTV Group**, France
- **Dominique Delpont**, CEO, **Havas Media**, France
- **Andreas Schneider**, Radio activity, Europe Technology Standards Office, **Sony**, Germany
- **Frédéric Sitterle**, Founder & President, **Skreen-House Factory/ MySkreen**, France
- **Bruno Smadja**, Associate Director, **MobilEvent**, France

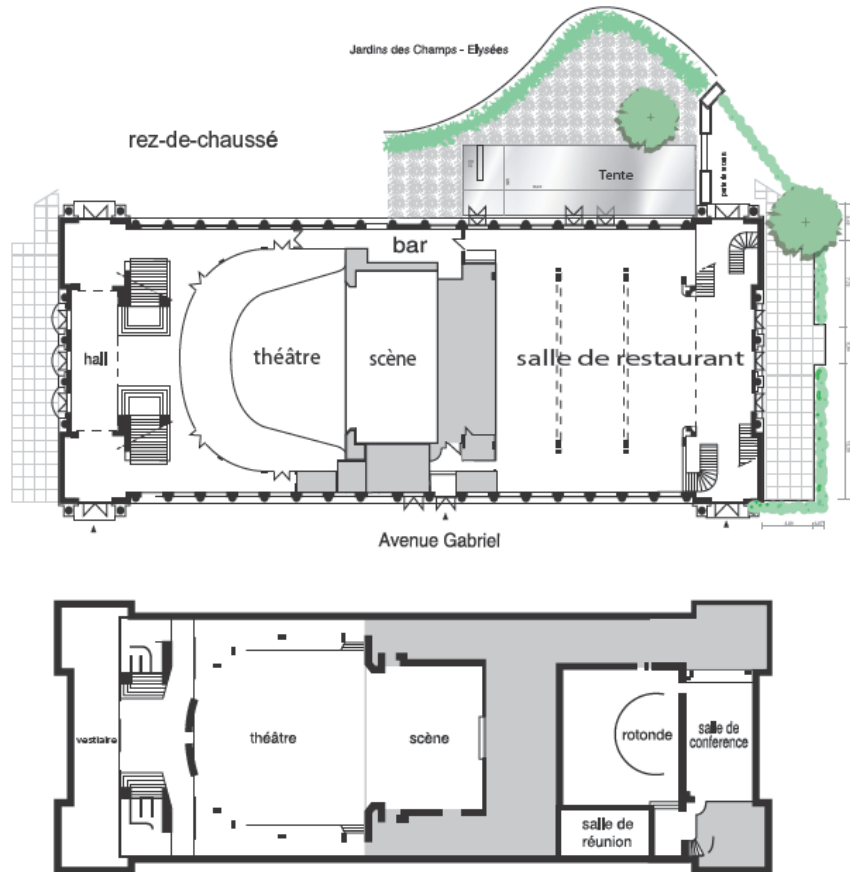
■ **Closing Session:**
3.30 p.m. – 4.00 p.m.

Closing Sessions: Next steps for Future TV

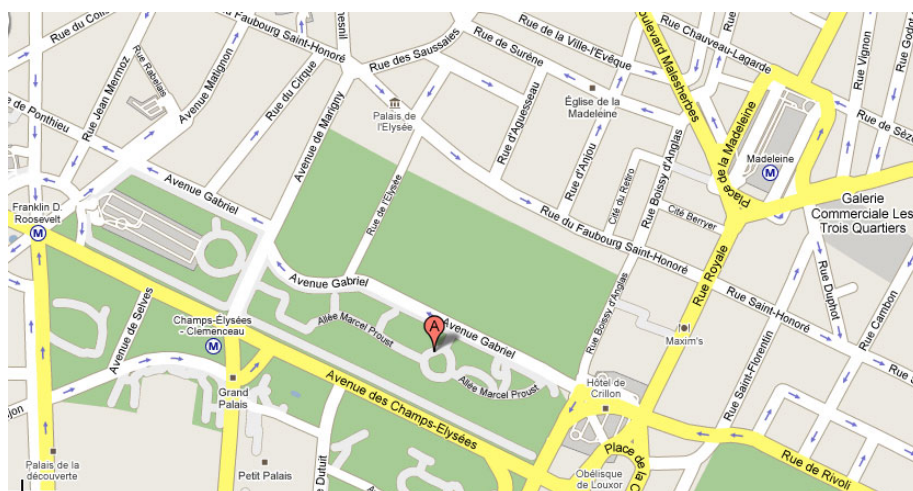
- **Jean-Baptiste Roger**, Advisor of the President of Ile-de-France Region
- **Etienne Kalalo**, Responsible for Industrial Development, **DRIRE**, French Ministry of Industry
- **Vincent Marcatté**, President, **Images & Réseaux Cluster**, Brittany / France

CONFERENCE VENUE

Future TV will be held at the prestigious **Espace Pierre Cardin**, Champs-Elysées gardens - adjacent to the famous Avenue des Champs-Elysées, near the Place de la Concorde and the Palais de l'Elysée.



Espace Pierre Cardin
1 Avenue Gabriel
75008 Paris





CONTACT & REGISTRATION

The conference is organized under the patronage of the
French Business Clusters
CAP DIGITAL and
IMAGES & RESEAUX
FICAM
and the European platform
NEM – Networked & Electronic Media

Conference Office

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Information and online registration:

www.futuretv2009.eu (English)

www.futuretv2009.org (French)

Participation to the conference is free of charge, registration is required.

Conference languages: English and French (with simultaneous translation)