

DTT : DECODER, SWITCH- OFF PROCESS, CNID

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Introduction

1.

Introduction

- This presentations covers the following aspects of the complex migration process to DTT:
 - **Receiving equipment**
 - **Switch-Off planning**
 - **CNID**

DTT Decoder (data are obtained from external sources (JFK)

2.

DTT Decoder

- **TYPE OF RECEIVING EQUIPMENT:**
 - **ZAPPER (standalone)**
 - **INTERACTIVE DECODER (standalone)**
 - **IDTV (Integrated Digital TV)**

DTT Decoder

- **ZAPPER FUNCTIONALITIES:**
 - DTT Tuner
 - Common Interface
 - Resident Navigator

DTT Decoder

- **INTERACTIVE DECODER
FUNCTIONALITIES:**

- DTT Tuner
- Common interface
- MHP for interactivity
- Return Channel
- CAS embedded
- Smart Card I/F

DTT Decoder

- **INTEGRATED DIGITAL TV**
 - Integrated in a digital TV set which includes at least a DTT tuner
 - Usually iDTV make part of top TV sets (e.g. wide screens) characterized by high prices

DTT Decoder

- PRICE RANGE OF RECEIVING EQUIPMENT:

- ZAPPER

- DECODER

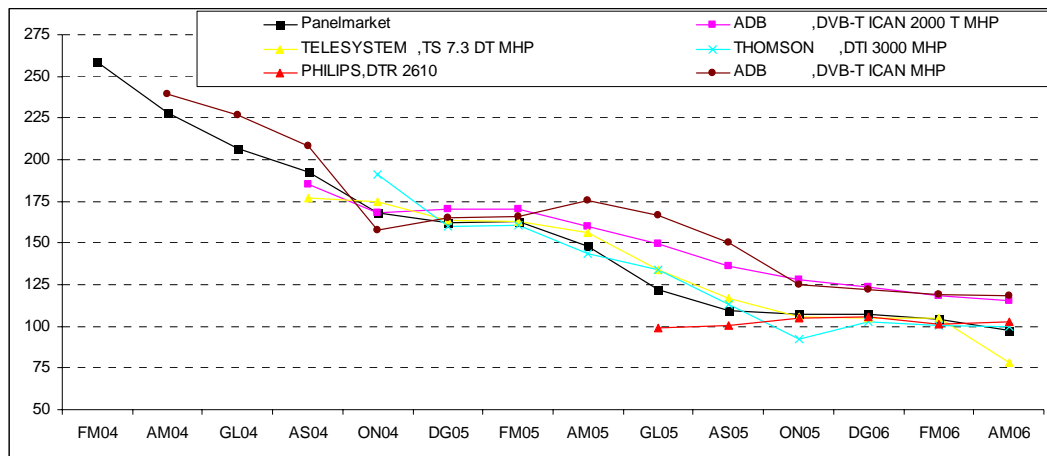
- IRD

DTT Decoder

GfK Marketing Services Italia

GfK Marketing Services Italia - Decoder Digitale Terrestre PREZZO MEDIO DEI 5 MODELLI PIU' VENDUTI DAL 2004 AD OGGI *

6



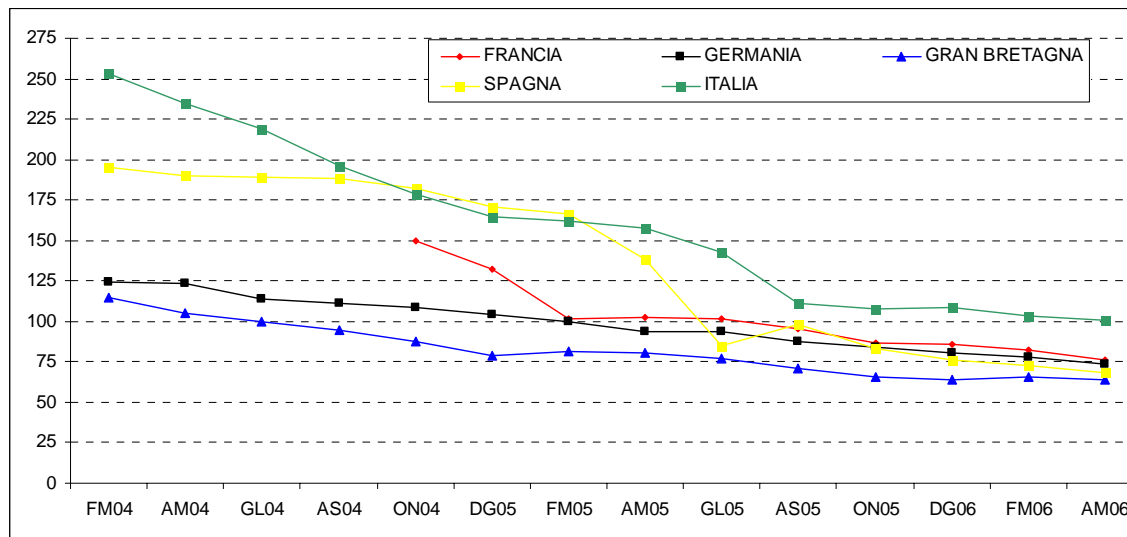
*= Il prezzo medio è il prezzo effettivo di vendita, al netto del contributo statale.

DTT Decoder

GfK Marketing Services Italia

GfK Marketing Services Italia - Decoder Digitale Terrestre PREZZO MEDIO DEI DECODER NEI PRINCIPALI PAESI EUROPEI *

8



* = Il prezzo medio è il prezzo effettivo di vendita, al netto dei contributi statali.

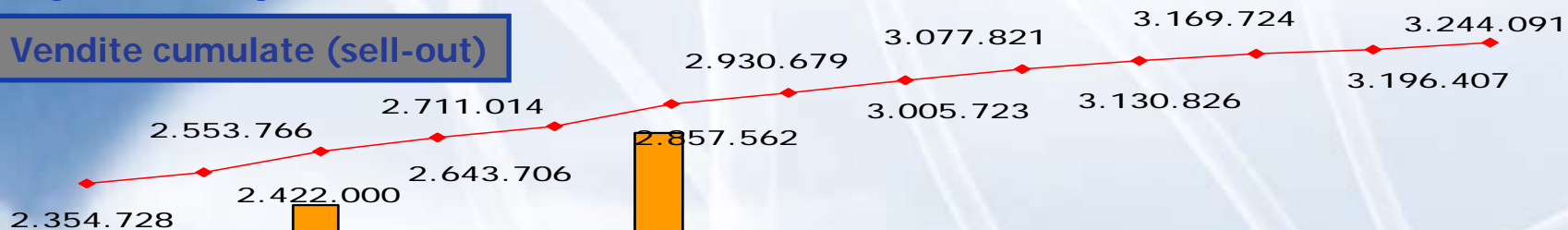


GfK Marketing Services Italia per DGTVi

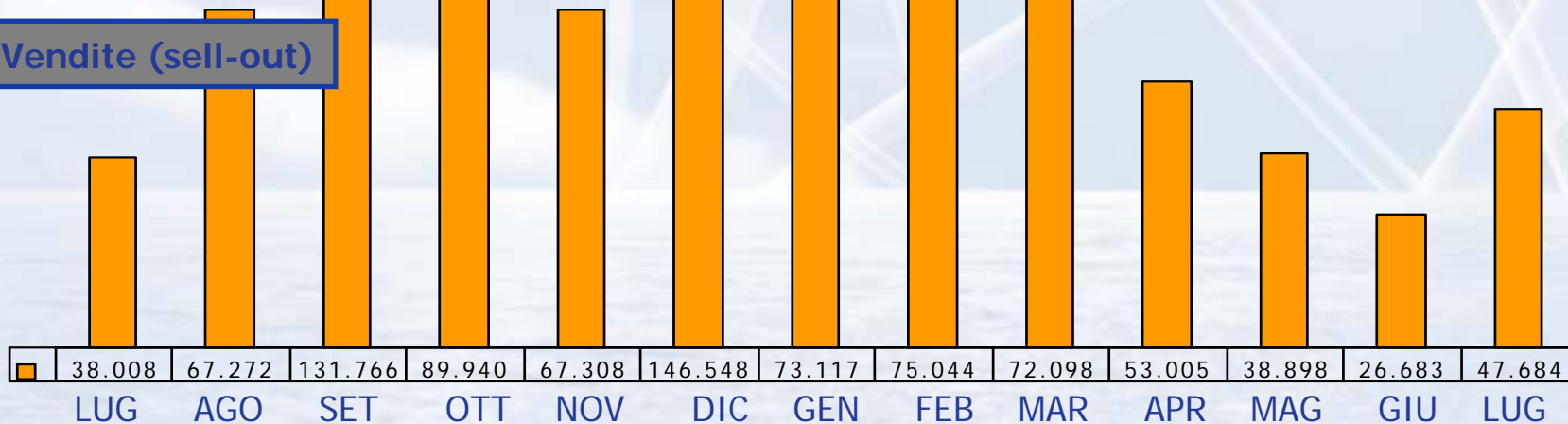
Decoder Digitale Terrestre - GfK Panelmarket

Luglio 06 – Luglio 2007

Vendite cumulate (sell-out)



Vendite (sell-out)



FONTE: Panel GfK Marketing Services Italia.

Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi

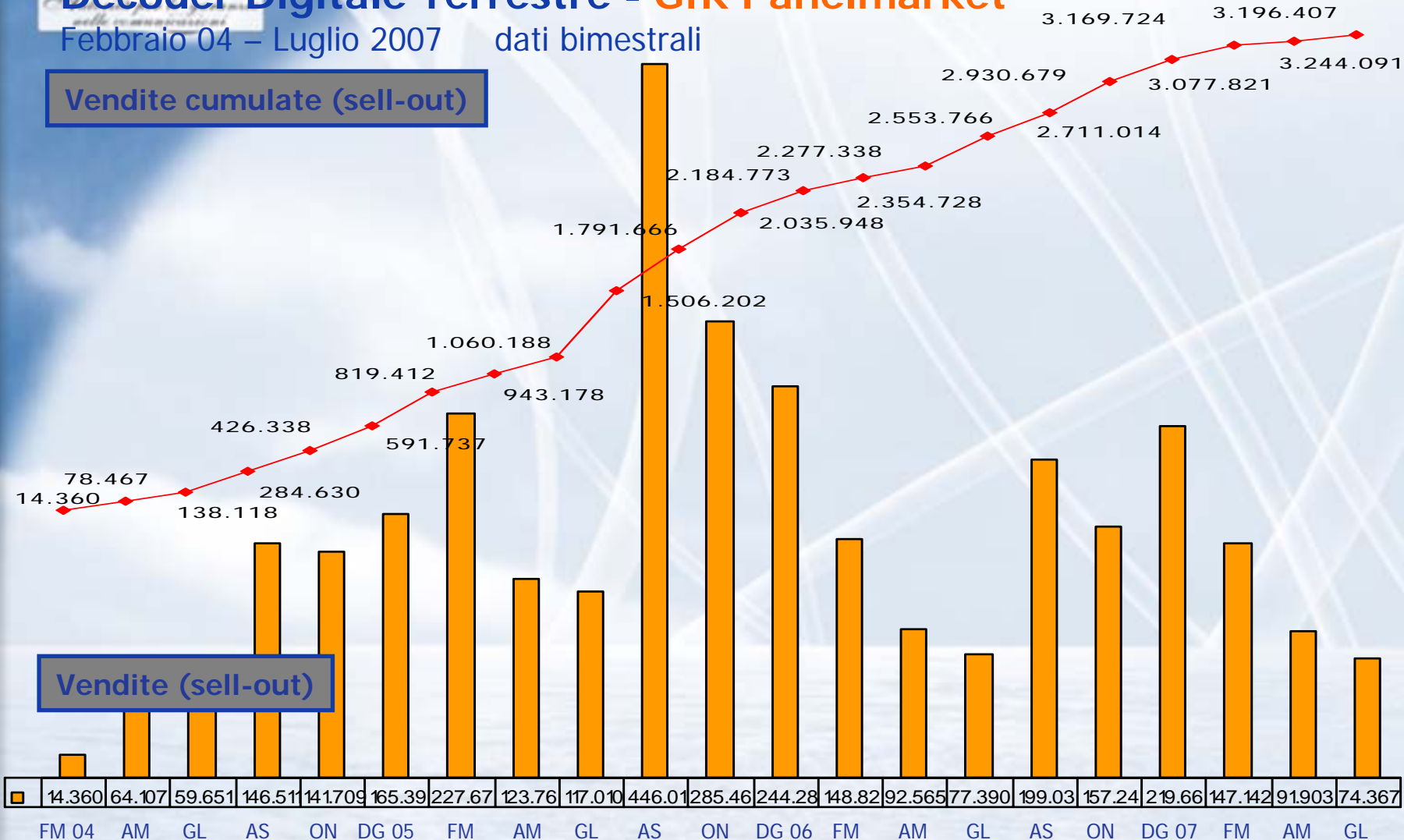


GfK Marketing Services Italia per DGTVi

Decoder Digitale Terrestre - GfK Panelmarket

Febbraio 04 – Luglio 2007 dati bimestrali

Vendite cumulate (sell-out)



Vendite (sell-out)

FONTE: Panel GfK Marketing Services Italia.
Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi



GfK Marketing Services Italia per DGTVi

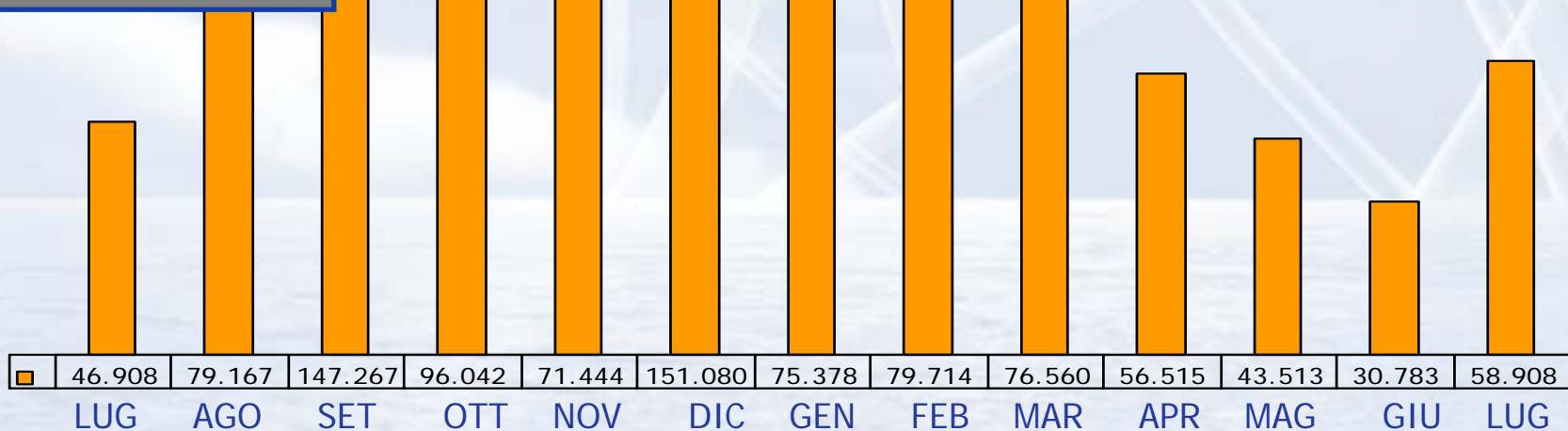
Decoder Digitale Terrestre – MERCATO TOTALE

Luglio 06 – Luglio 2007

Vendite cumulate (sell-out)



Vendite (sell-out)



FONTE: Panel GfK Marketing Services Italia.

Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi



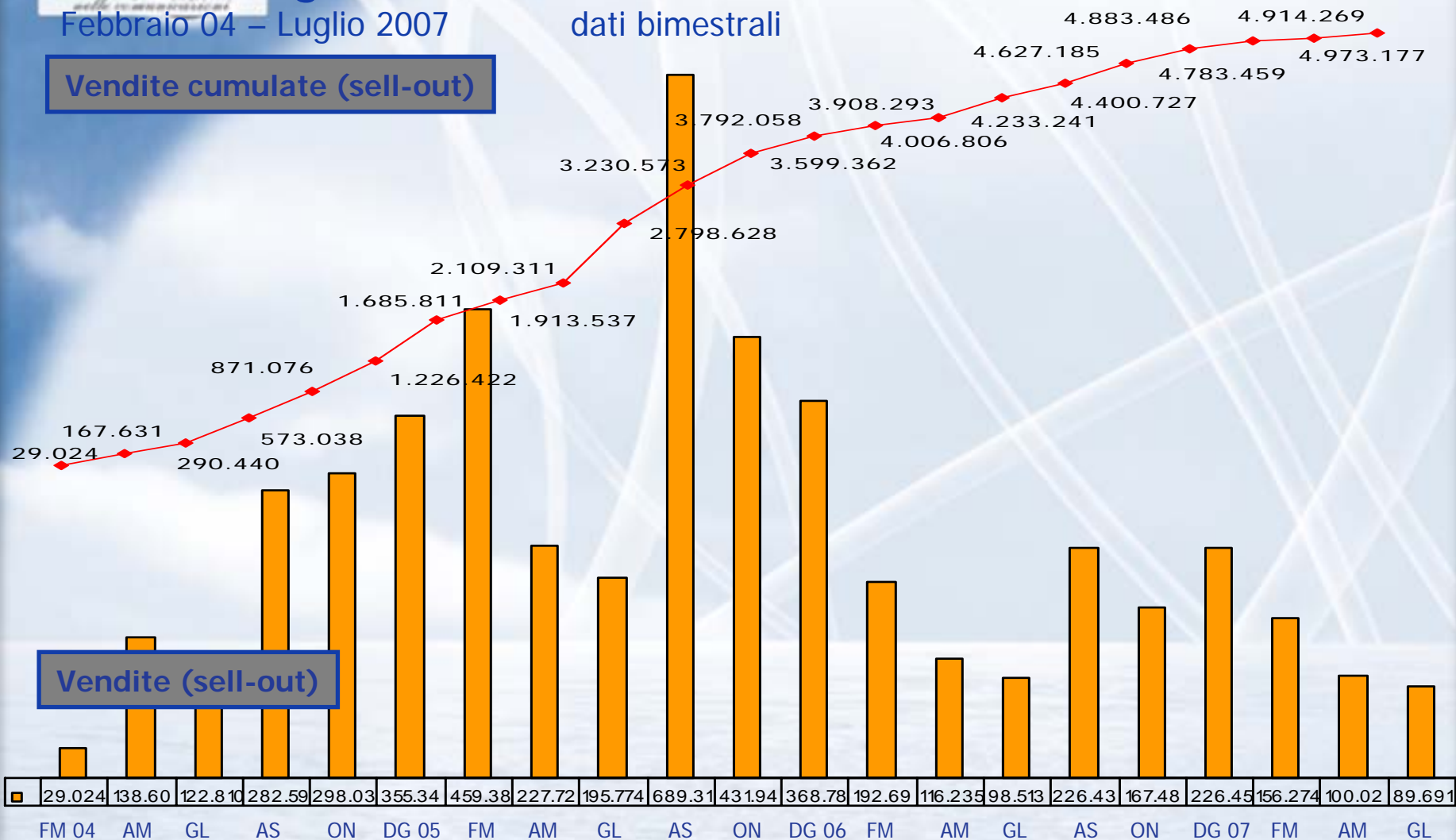
GfK Marketing Services Italia per DGTVi

Decoder Digitale Terrestre – MERCATO TOTALE

Febbraio 04 – Luglio 2007

dati bimestrali

Vendite cumulate (sell-out)



Vendite (sell-out)

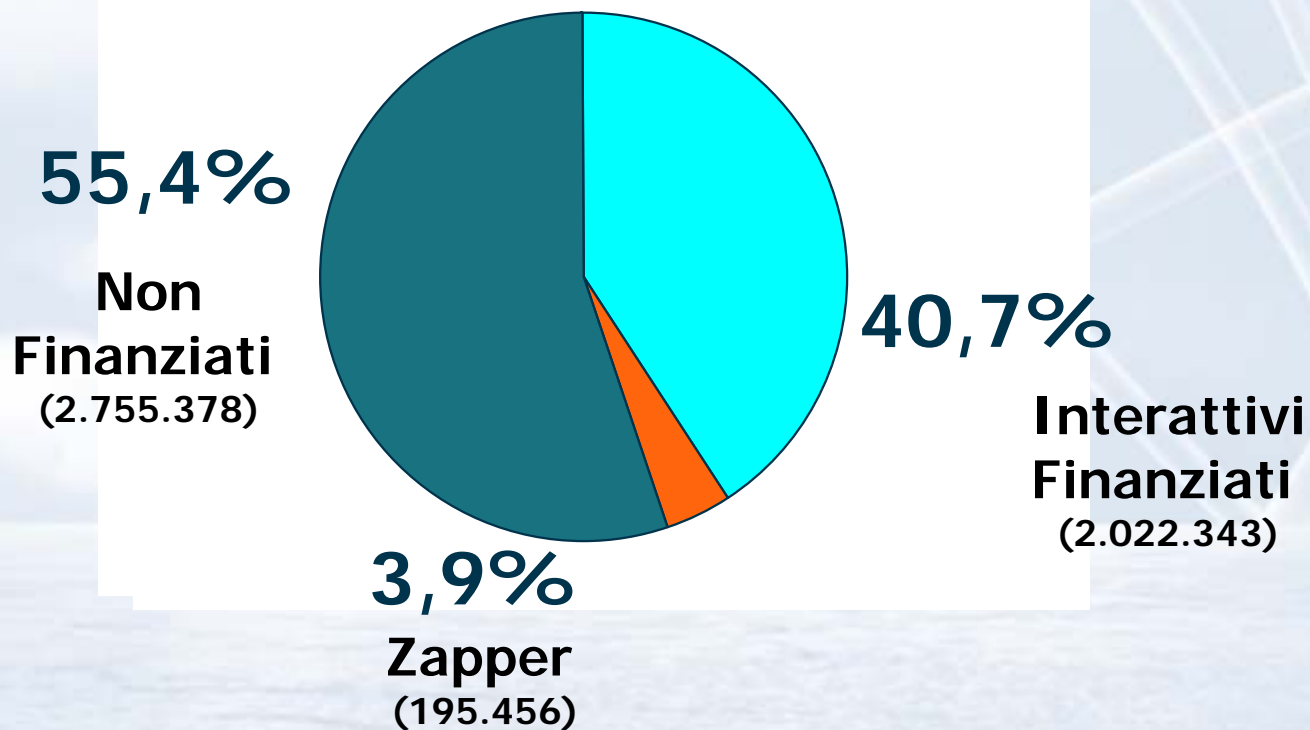
FONTE: Panel GfK Marketing Services Italia.

Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi



GfK Marketing Services Italia per DGTVi Decoder Digitale Terrestre **STIMA MERCATO TOTALE** a fine Luglio 2007

TOTALE : 4.973.177 (Feb04-Lug07)



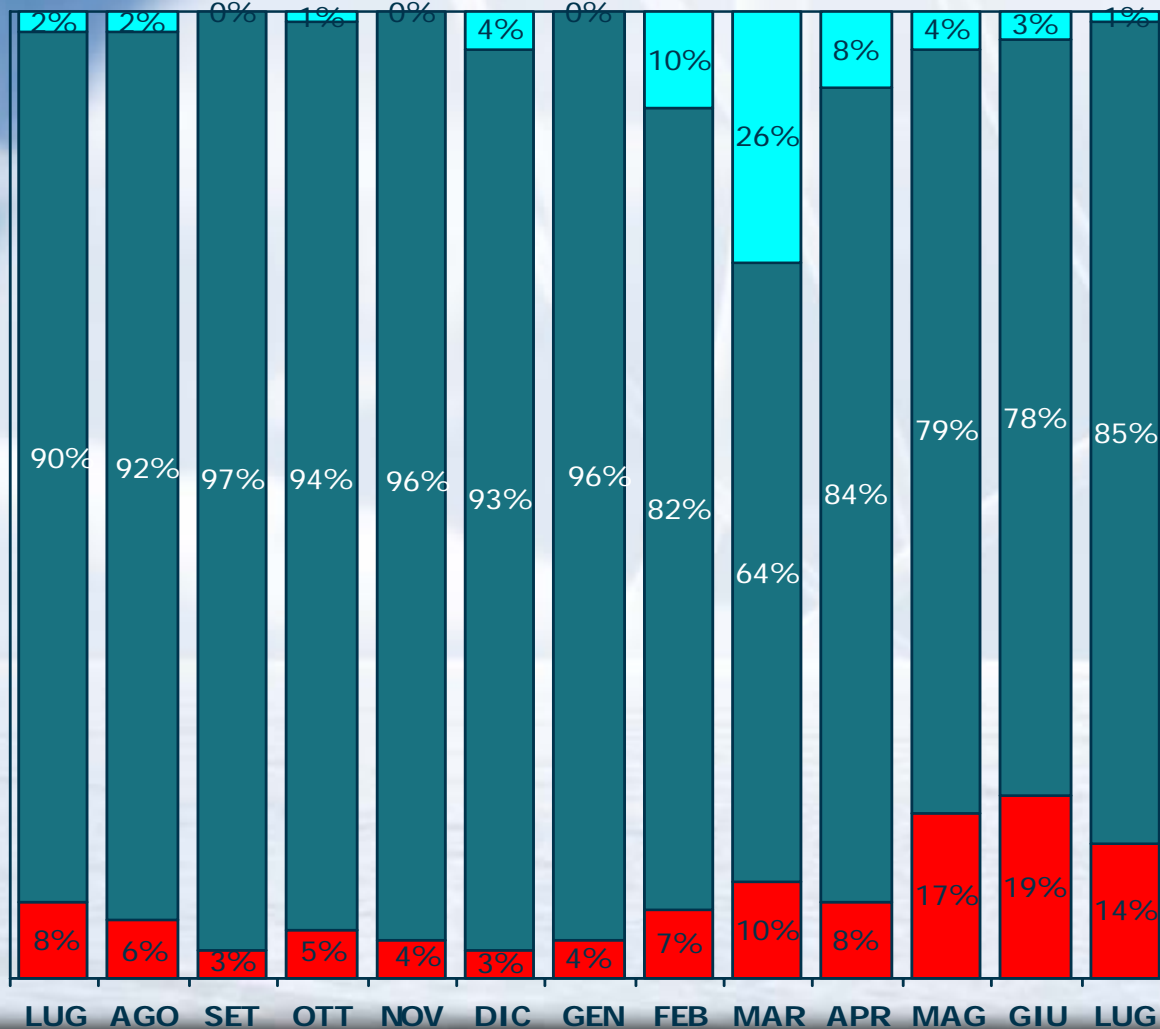
**FONTE: STIMA su Panel GfK Marketing Services Italia e dati Ministero
Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi**



GfK Marketing Services Italia per DGTVi

Decoder Digitale Terrestre - **MERCATO TOTALE** a Luglio 2007

Decoder Interattivi finanziati vs. non finanziati vs. Zapper
Vendite a quantità



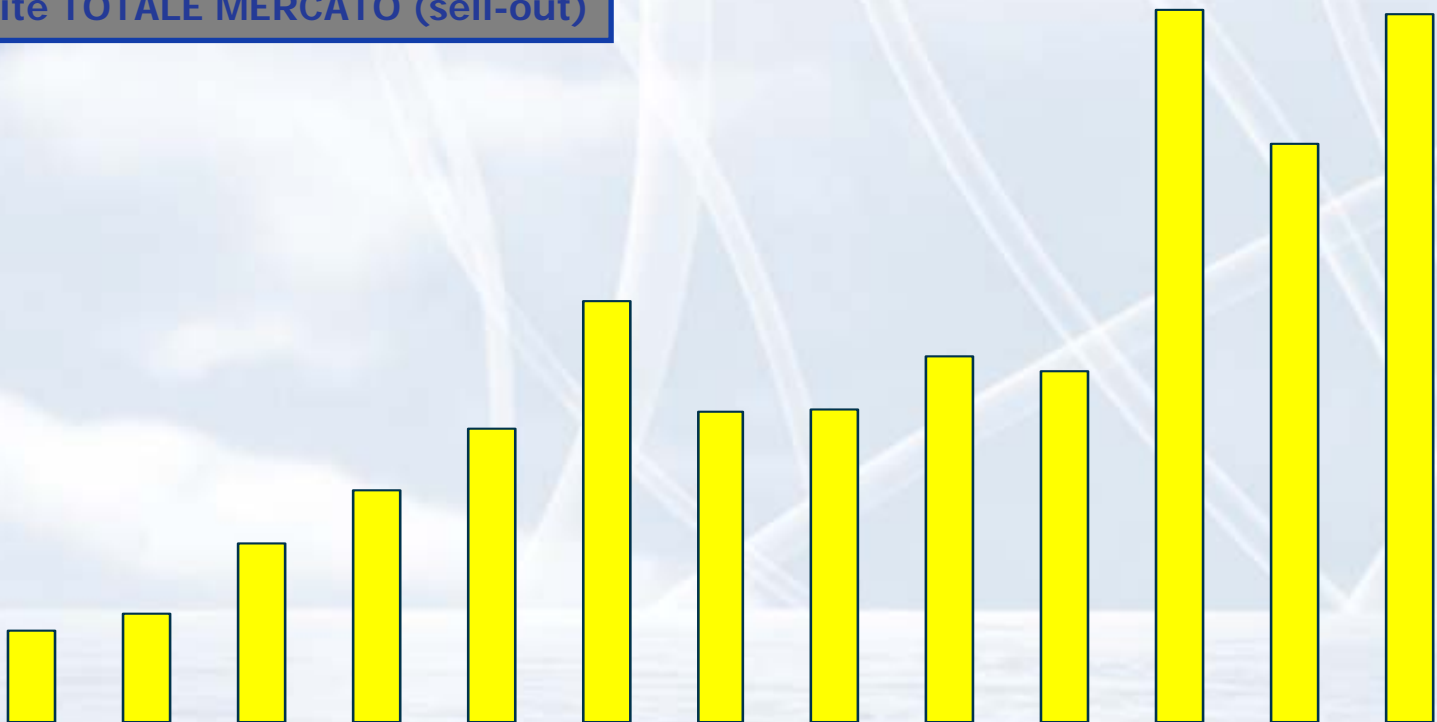


GfK Marketing Services Italia per DGTVi

Decoder Digitale Terrestre – **TOTALE MERCATO Integrati**

Luglio 06 – Luglio 2007

Vendite TOTALE MERCATO (sell-out)



| | lug-06 | ago-06 | set-06 | ott-06 | nov-06 | dic-06 | gen-07 | feb-07 | mar-07 | apr-07 | mag-07 | giu-07 | lug-07 |
|-----------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| Integrati | 10941 | 12968 | 21283 | 27732 | 35058 | 50337 | 37064 | 37397 | 43777 | 41871 | 85076 | 69144 | 84548 |

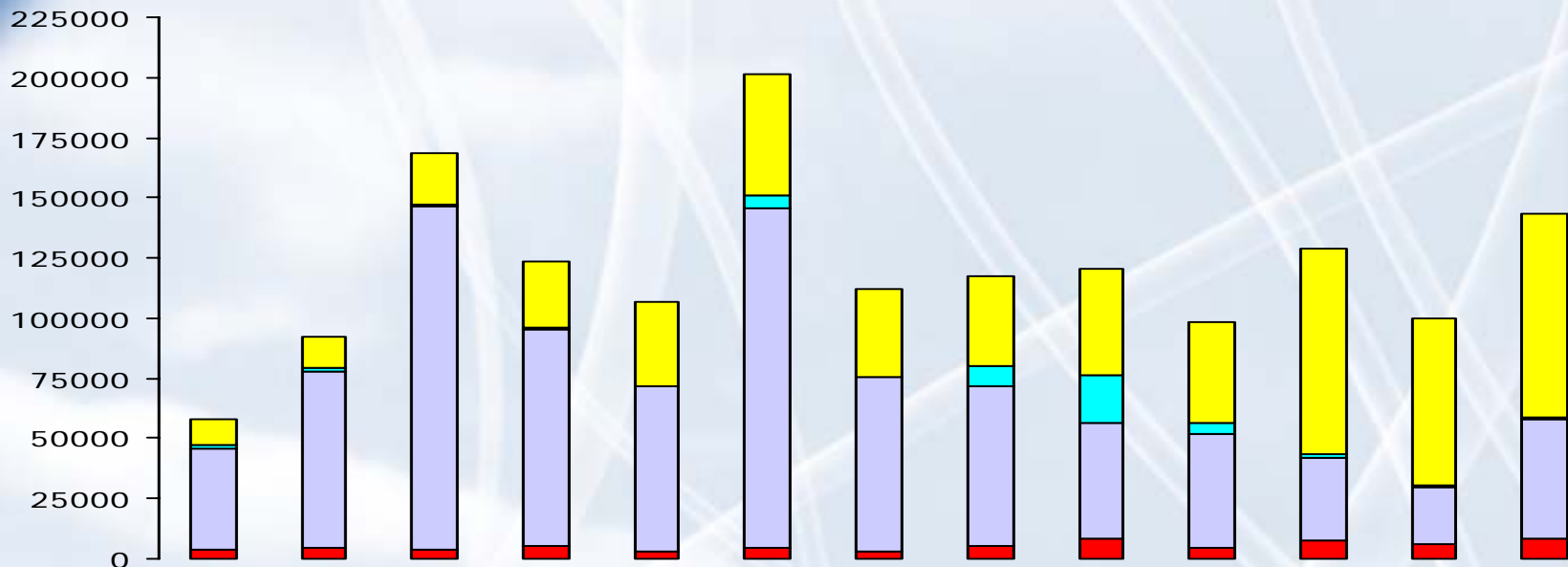
**FONTE: Panel GfK Marketing Services Italia.
Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi**

GfK Marketing Services Italia per DGTVi

Decoder Digitale Terrestre – Tipologie Stand Alone Vs Integrati

TOTALE MERCATO Luglio 06 – Luglio 07

Vendite TOTALE MERCATO (sell-out)



| | lug-06 | ago-06 | set-06 | ott-06 | nov-06 | dic-06 | gen-07 | feb-07 | mar-07 | apr-07 | mag-07 | giu-07 | lug-07 |
|-----------------------|-----------|-----------|------------|------------|------------|------------|------------|------------|------------|-----------|------------|-----------|------------|
| ■ INTEGRATI | 10941 | 12968 | 21283 | 27732 | 35058 | 50337 | 37064 | 37397 | 43777 | 41871 | 85076 | 69144 | 84548 |
| ■ MHP FINANZIATI | 1034 | 1211 | 688 | 628 | 26 | 5606 | 0 | 8366 | 19884 | 4565 | 1643 | 782 | 639 |
| ■ MHP NON FINANZIATI | 42015 | 73029 | 142889 | 90282 | 68403 | 140553 | 72211 | 65641 | 48660 | 47231 | 34401 | 24136 | 49908 |
| ■ ZAPPER | 5759 | 9227 | 1680 | 1232 | 1065 | 2042 | 1112 | 4176 | 1206 | 9813 | 1469 | 989 | 143 |
| Vendite totali | 49 | 35 | 551 | 774 | 502 | 417 | 443 | 110 | 337 | 86 | 588 | 27 | 456 |

FONTE: Panel GfK Marketing Services Italia.

Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi

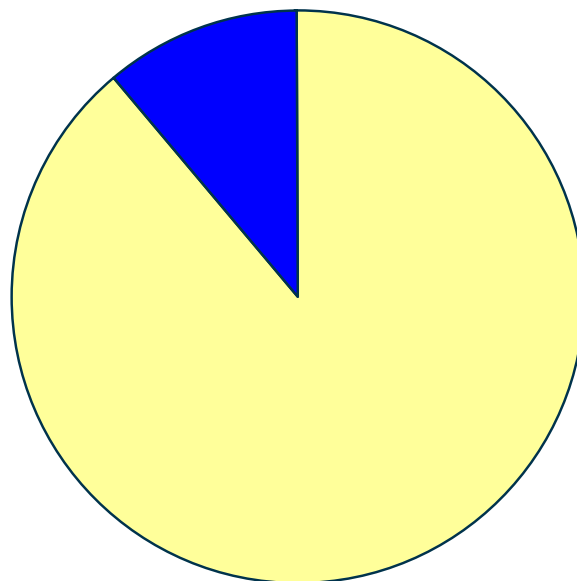


GfK Marketing Services Italia per DGTVi Decoder Digitale Terrestre & Decoder Terrestre Integrato **STIMA MERCATO TOTALE** a fine Luglio 2007

TOTALE : 5.598.450 (Feb04-Lug07)

**Decoder Digitali
Terrestri integrati
in altri apparecchi**
(625.273)

11,2%



88,8%

**Decoder Digitali
Terrestri**
(4.973.177)

**FONTE: STIMA su Panel GfK Marketing Services Italia.
Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi**

SWITCH-OFF PROCESS

3.

S/O Process

- **Analogue TV Switch-Off /S/O)**
- First Final date for National S/O: **end 2006** (set in Law n. 66, 2001)
- Second Final date for National S/O: **end 2008** (Decreto Legge n. 273, 22/12/2005)
- S/O date could be postponed (2012 ?)

S/O Process

- **S/O Transition Process:**
 - Based on a gradual process
 - Based on “all digital” areas
 - Based on dates fixed and well defined with respect to “all digital” areas

S/O Process

First “all digital” area: Cagliari and Provincia:

- S/O date: 1 march 2007
- Partial S/O: only 3 digital transmitted programmms
- RETE 4, RAI 2, QOOB

S/O Process

Second “all digital” area: Aosta and other 16 Valle d’Aosta villages:

- S/O date: 16 april 2007
- Partial S/O: only 3 TV programs (RAI 2, RETE 4, QOOB)

S/O Process

- **S/O Calendar planning:**
 - CNID has decided to extend to entire Sardinia S/O of 3 analogue programmes (November/10/2007)
 - CNID has started a program for S/O enlargement with the possibility to include other 2 Italian regions (Trentino Alto Adige and Piemonte)

S/O Process

- **S/O Calendar planning:**
 - Full S/O (all analogue TV programs) set in Sardinia for March 1 2008
 - Full S/O (all analogue TV programs) set in Valle D'Aosta for October 1 2008

CNID

4.

CNID

- The Italian Ministry of Communications has set (Decreto Ministeriale, 4 august 2006) the **Comitato Nazionale Italia Digitale (CNID)** with the following objectives:
 - To define all activities necessary to S/O
 - To coordinate all activities necessary to S/O
 - To identify “all digital” areas
 - To propose the “all digital” areas planning

CNID

- **CNID structure:**

- **Coordination Group** (Chaired by Ministry Gentiloni and composed by AGCOM, DGTVi, Rai and RTI members)
- **Technical Group** (Chaired by AGCOM and DGTVi, and with participation of AGCOM, Ministry, broadcasters, DGTVi, local TV association))
- **9 Technical area groups**

CNID

- **CNID area groups:**
 - Communications area
 - Data and research area
 - Customer Care area
 - Networks development monitoring area
 - STB monitoring area
 - Regulatory area
 - Digital planning area
 - DTT contents area
 - Platform coordination area

CNID

- **Partecipazione to CNID areas:**
 - National Broadcasters
 - Local Broadcasters
 - Ministry of Communications
 - AGCOM
 - Manufacturers
 - Regions
 - Consumer associations
 - Other TV platforms (satellite, IPTV)
 - TV associations, equipment associations, etc.

Comitato Nazionale "ITALIA DIGITALE"

"Comitato Nazionale Italia Digitale" (Decreto Ministeriale, 4 Agosto 2006)

Chair: Ministro delle Comunicazioni

Partecipanti: DGTVi, AGCOM, Conferenza Unificata Stato-Regioni, Broadcasters Nazionali, Associazioni emittenti locali, Operatori cavo e satellite, Associazioni consumatori, Regioni 'All Digital' (Sardegna e Valle D'Aosta).

Report mensile

Piano delle Attività

Gruppo Tecnico

Co-Chair: AGCOM e DGTVi

Partecipanti: Ministero delle Comunicazioni, Broadcasters nazionali digitali, operatori cavo e satellite.

Uditori: Consumatori, Regioni "All Digital", imprese (manifatturieri, distributori, installatori).

9 gruppi di lavoro

Comunicazione

Dati e Ricerche

Assistenza Clienti

Reti

Set Top Box

Regolamen-
tazione

Normativa

Contenuti

Coordinamento
Piattaforme

CNID

- **Example of 24-07-2007CNID meeting themes:**
 - Definition of next S/O dates
 - Extension to whole Sardinia the S/O of Rete4, Rai Due and QOOB
 - Possibility (under study) of next S/O in Piemonte and Trentino
- Hypothesis to impose on the market TV sets with DTT tuner integrated
- Digital Dividend
- Information/Communications campaign to promote DTT (planned for November 2007)

CNID

- **COMMUNICATIONS AREA:**
 - **Main objectives: Definition and realization of communications events, monitoring of such initiatives, suggestions for financing**
 - **Partecipazione: Broadcasters, Consumers, Local TV association, MinCom**

CNID

- **DATA AND RESEARCH AREA:**
 - **Definition and setting of data gathering on STB penetration, and other themes, defines relations with specialized data research companies, financing suggestions**
 - **Partecipazione: Broadcasters, AGCOM, MinCom, Associations**

CNID

- **CUSTOMER CARE AREA:**
 - **Defines adequate custom support , suggests measures to support “weak” population areas, suggests financing forms**
 - **Partecipazione: Broadcasters, AGCOM, MinCom, DGTVi, Associations (Installers, Consumers, etc.)**

CNID

- **TV NETWORKS DEVELOPMENT AND MONITORING AREA**
 - **Gathering of information relative to DTT network coverages, monitoring of broadcaster networks, promotion of studies related to coverages**
 - **Partecipazione: Broadcasters, MinCom, AGCOM, DGTVi, local TV Association**

CNID

- **SET TOP BOX AND RECEIVING EQUIPMENT AREA:**
 - **Monitoring of the STB market (price, tech. Char.), decoder and IDTV evolution. Decoder interoperability. Transparency to clients, DTT Numbering.**
 - **Partecipazione: Broadcasters, MinCom, AGCOM; Manufacturers, Distributors; Local TV Associations**

CNID

- **REGULATORY AREA:**
 - **Defines the regulatory interventions and measures for a correct migration to DTT**
 - **Partecipazione: Broadcasters, DGTVi, AGCOM, MinCom, Local TV Association**

CNID

- **DIGITAL PLANNING AREA:**
 - **Suggests the modifications necessary to respect the “all digital” area transition as planned, proposes the final national S/O date, financing problems**
 - **Partecipazione: Broadcasters, MinCom, AGCOM, DGTVi, Regions, Local TV Associations**

CNID

- **DTT CONTENTS AREA:**
 - **Monitor the DTT program offer on the DTT Mux, monitor problems related to content rights on the various platforms**
 - **Partecipazione: Broadcasters, AGCOM, MinCom, Associations**

CNID

- **PLATFORM COORDINATION AREA:**
 - **Identify single spots on the Italian territory where DTT coverage is not possible, identify Multiplatform potential usage**
 - **Partecipazione: Broadcasters, MinCom, AGCOM, Local TV Associations**