

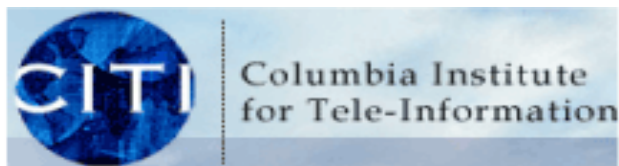


The role of the media content supplier in the digital TV revolution

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ROUSAMEDIA

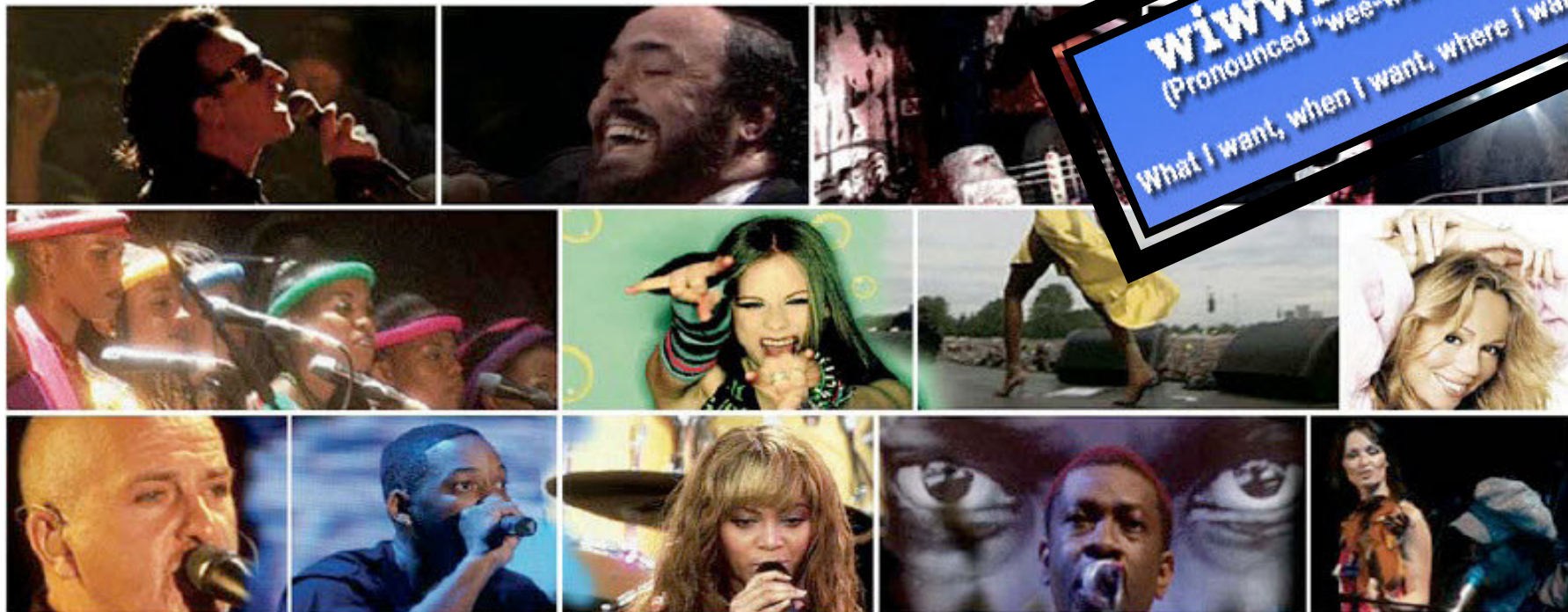


Agenda

- The message
- Content expectations
- Media dimensions
- Media Press role in Greece
- Greece in the digital map
- Platforms
- EU content regulation
- Role of the media content supplier
- Licensing advisory services
- Conclusions

The role of the media
content supplier in the
digital TV

The message



Blogging, photographs, videos, file-sharing, podcasts etc.

4-Screens

WiiWiiWiiW
 (Pronounced "wee-wee-wee")
 What I want, when I want, where I want



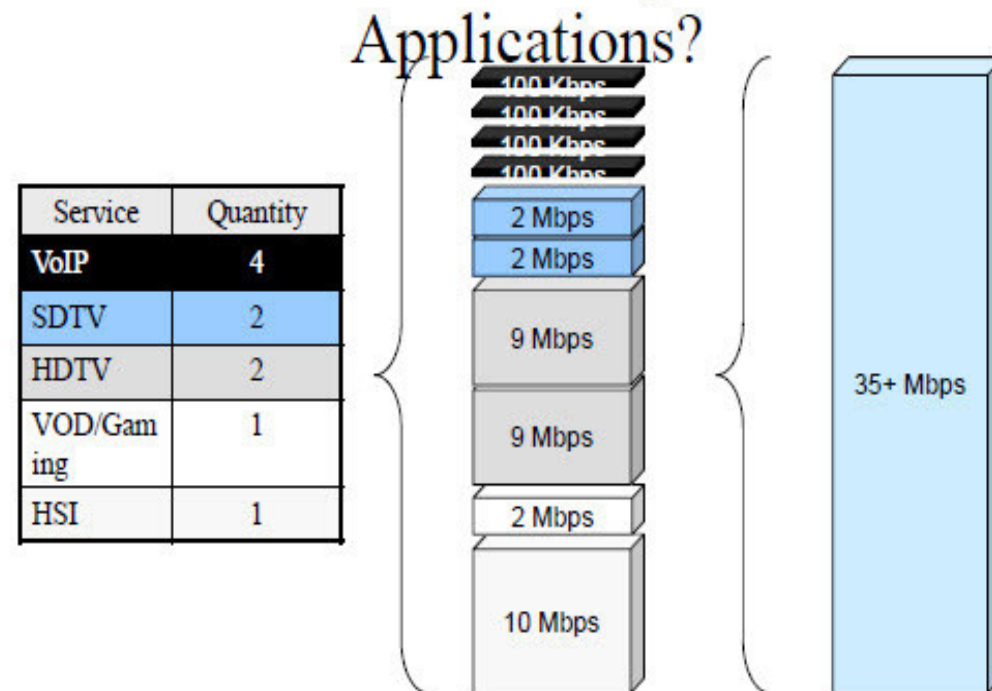
Expectations for Content ?

- More specialized programs
- More individualized content
- Anytime, anywhere video entertainment
- More user-generated content
- More independent and foreign TV
- **But, this would be invariably wrong**

Media Dimensions

- Widening
- Deepening

How much Capacity per Household is
needed for Existing Content

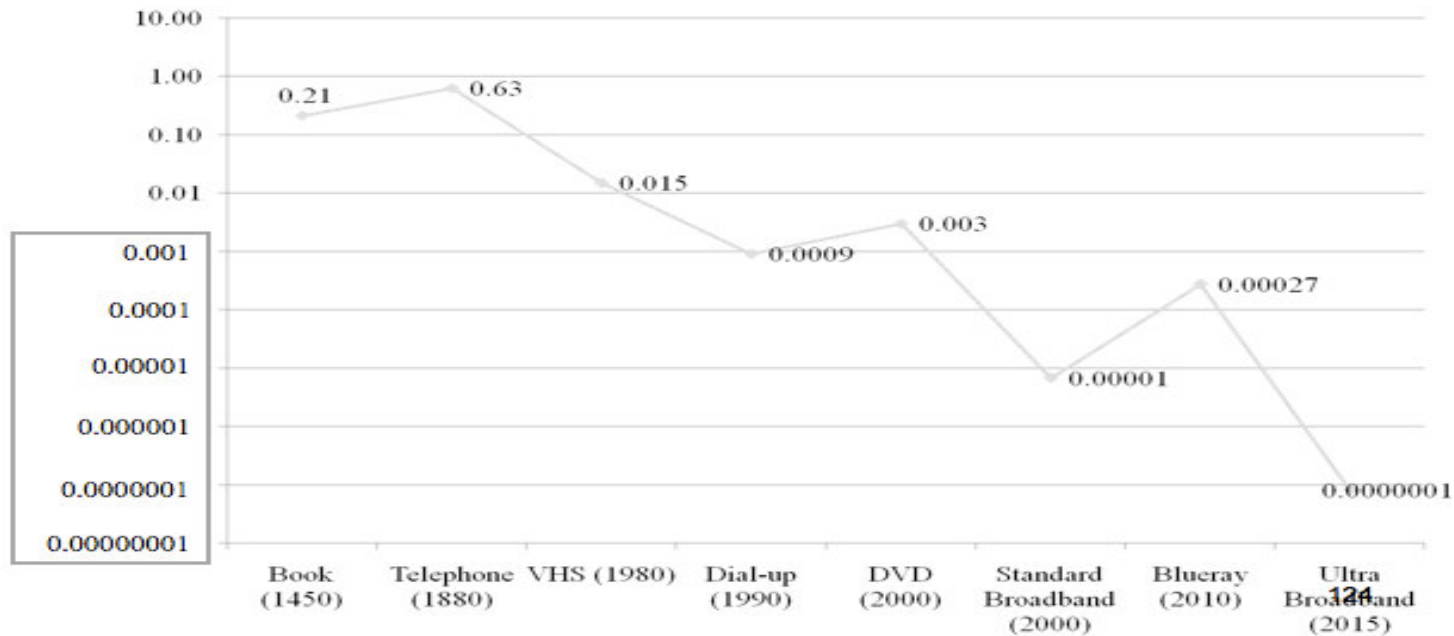


Motorola. "The Next Generation Network: Ultra-Broadband IPTV". April 2006, last 14
accessed on 21 March 2008 at www.ihollywoodforum.com/old/documents/IPTV/10.ppt

The role of the media
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Richness

**Distribution cost per Mbit/cap in \$cent –
Individualized Channels**

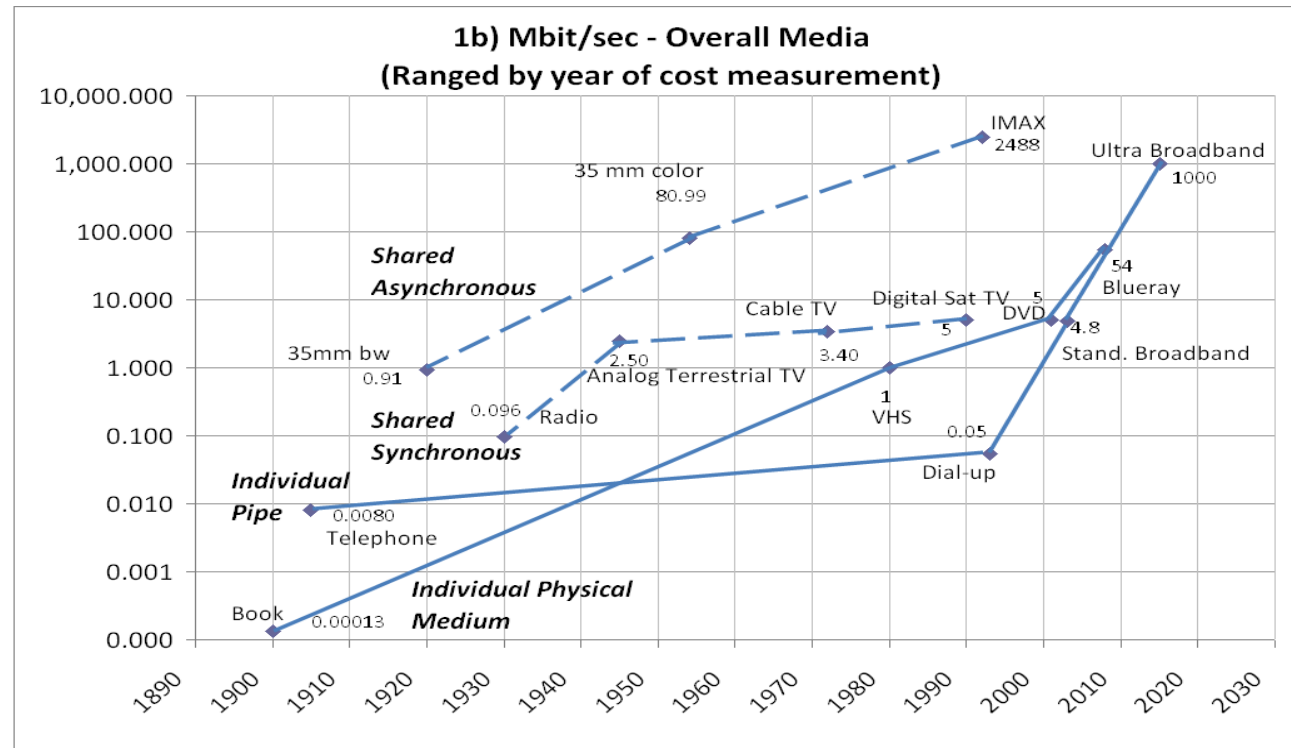


↓ 9.8% since 1880

If Fiber is the Medium, What is the Message? Eli M. Noam, Communications and Strategies, November 2008

The role of the media
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Richness cont.



↑ 8% richness

If Fiber is the Medium, What is the Message? Eli M. Noam, Communications and Strategies, November 2008

Γενική Γραμματεία Επικοινωνίας και Γενική Γραμματεία Ενημέρωσης



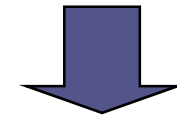
<http://www.minpress.gr/>

Is Greece digital ready?

www.zealsol.com

| e-readiness rank (of 69) | 2006 rank | Country | 2007 e-readiness score (of 10) | 2006 score |
|--------------------------|-----------|-------------|--------------------------------|------------|
| 1 | 1 | Denmark | 8.88 | 9.00 |
| 2(tie) | 2 | US | 8.85 | 8.88 |
| 2(tie) | 4 | Sweden | 8.85 | 8.74 |
| 4 | 10 | Hong Kong | 8.72 | 8.36 |
| 5 | 3 | Switzerland | 8.61 | 8.81 |
| 6 | 13 | Singapore | 8.60 | 8.24 |
| 7 | 5 | UK | 8.59 | 8.64 |

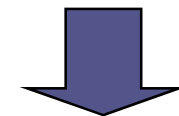
**E-Government
Readiness**



Greece #44

GDP/capita, #39

| | | | | |
|----|----|--------------|------|------|
| 31 | 32 | Czech Rep. | 6.32 | 6.14 |
| 32 | 29 | Greece | 6.31 | 6.42 |
| 33 | 30 | UAE | 6.22 | 6.32 |
| 34 | 32 | Hungary | 6.16 | 6.14 |
| 35 | 35 | South Africa | 6.10 | 5.74 |



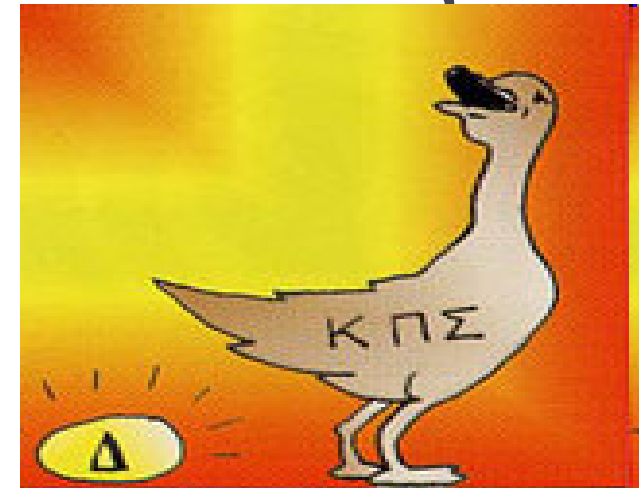
\$30,600

Source: The Economist Intelligence Unit 2007 and UN 2008

Γενική Γραμματεία Ενημέρωσης και Γενική Γραμματεία Επικοινωνίας

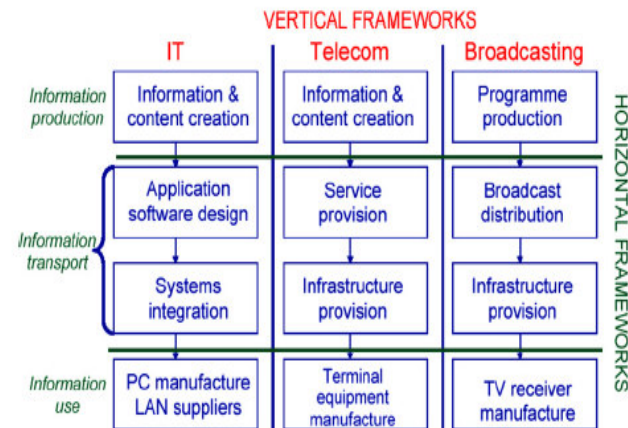
Services

- Digital content production
- Digital libraries
- WebTV
- Digital docs and files
- Digital signature
- Content regulator



EU Content Regulation

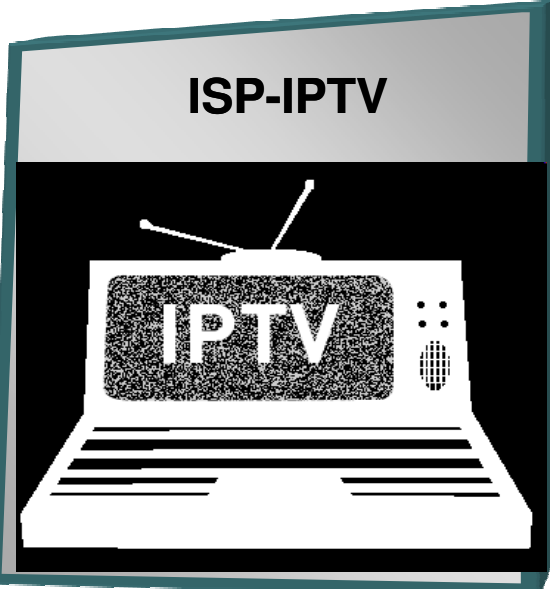
- **Audiovisual Media Services Directive**
 - ISPs and telcos will be equally subject to content requirements
 - “Horizontal approach”
 - “Technology neutrality”
 - “co and self-regulation”
- **eContent Plus**
 - More accessible
 - Educational, cultural and scientific
 - **“...Content not only needs to speak Italian but think in Italian”**



Based on: Squire, Sanders & Dempsey, Adapting the EU Telecommunications Regulatory Framework to the developing multimedia environment, 1998

EU-25 content usage patterns

- Popular applis
 - Email
 - Gaming
 - Gambling
 - Adult entertainment
 - Online news
 - Travel
 - Information searches



For Broadband providers

Artists

1. Internationally known and local artists
2. VOD
3. Fixed channels
4. Major record companies

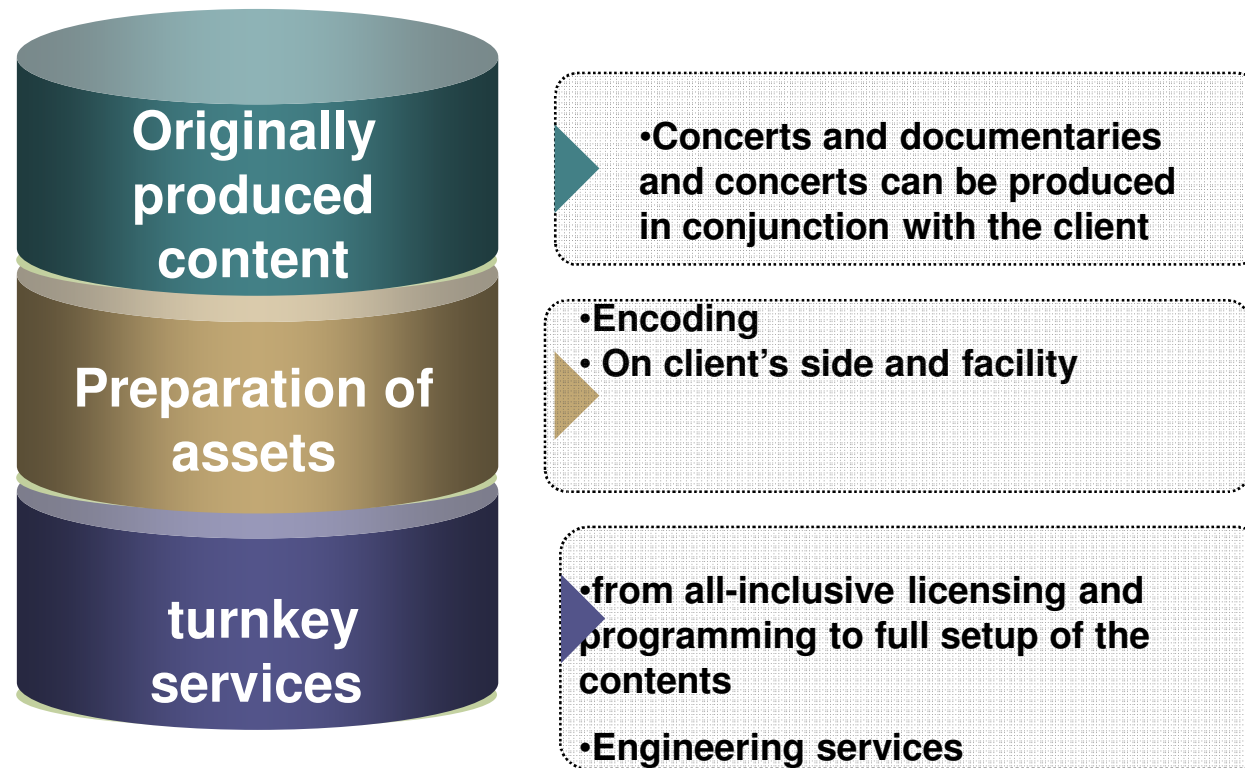
Licensed content

1. Entertainment
2. Sports
3. Lifestyle

Considerations

1. Local restrictions and laws
2. Culture
3. Social

Mobile



Licensing advisory services

- license music and lifestyle content from the latest music video featuring the biggest stars to locally known musicians singing in the local language. Live concerts, film clips produced by our team or yours
- assist to determine the format you desire and to acquire the rights for your specific use.



Licensing Example



- With Free.fr:
 - Develop their digital platform through
 - Technical preparation and execution
 - Encoding to their specific format
 - Suggest, Chose and license specific content
 - Report and make payments to both public performance owners and content owners
 - Maintain a direct relationship with all content owners

The logo for Rousseau Media, featuring the words "ROUSSEAU MEDIA" in a stylized, black, hand-drawn font.

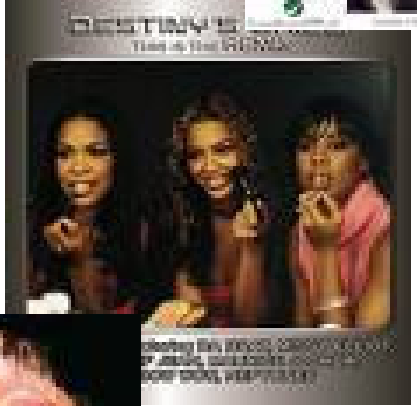
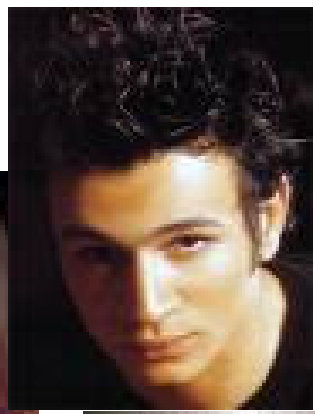
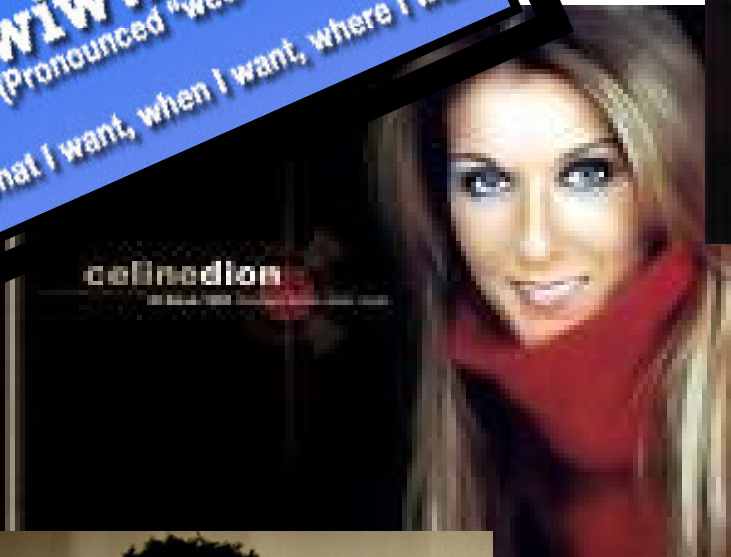
The logo for ExelixisNET, featuring a blue globe icon above the text "ExelixisNET" in a blue, sans-serif font.

Media content's supplier scope

- Programming independence- custom content to the specification of the client
- Outsourced acquisitions, licensing and production with no in-house need for staff
- Unique programming giving client a competitive edge

The role of the media content supplier in the digital TV

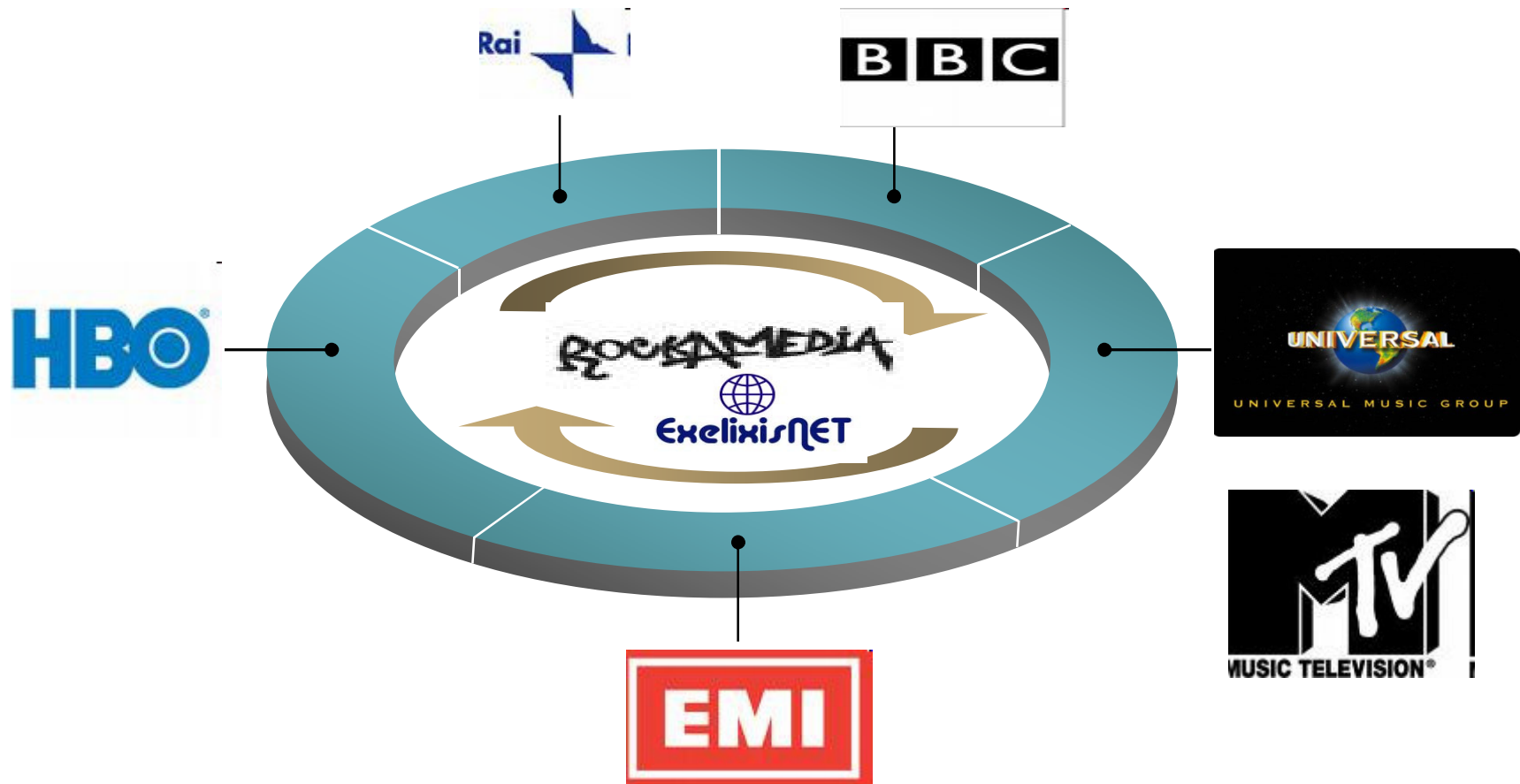
wiwwiwwiw
(Pronounced "wee-wee-wee")
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Conclusions

- Need for expert advisors
- The nature of a medium affects its content
- Television Without Frontiers Directive?
- Keep an eye on EU regulation
- If people will spend more of their lives inside media, they will consume more, and media companies will get more of their time, attention, and money.
- Globalization really helps
- **US firms will be especially successful in digital content for IPTV early entrants**
 - Entertainment content production
 - Language
 - Immigration of tech and content talent
 - Diverse culture

Collaborations



Questions



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