

# The Changing CE World

convergence,  
connectivity and  
competition

10-11 November 2008  
Barcelona

# BLU - RAY SERVICES



**BRICKBOX DIGITAL MEDIA** provides the complete solution for Blu-ray production cycle. No longer do you need to talk to several service providers. All Blu-ray production services are now available through a single company from digital material operation, to asset management, sound services, localization, creative design, optical media production, replication, printing management, distribution, repackaging and recycling.

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- Creative 2D/3D motion design for menu's
- Creative POP UP menu and more complex interactivity features including (profile 1.1 and future Live profile)
- Professional QC check and verification masters
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## Replication services:

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- Implementation of AACs into BD titles
- Various Blu-ray disc packaging
- Booklet and Inlay printing
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## Audio:

Our sound studio is able to process wide range of audio services and conversion to final audio formats including:  
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## Copy protection:

We use AACs and optionally BD+, including administration with AACs LA, content modification and functionality testing using AACs.

## Compatibility:

We have our own Blu-ray testing lab and we test all Blu-ray discs in all mainstream BD players and all software players to ensure quality and compatibility!

## Special features:

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- interactive components
- 3D graphics ideas
- advanced interactivity based on usage of player local memory
- BD-Java
- BD-Live



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# Welcome

Welcome to The Changing CE World, where we focus on consumer electronics devices and in particular the impact of convergence and connectivity. Following on from two years of the highly successful “High Definition in Europe” conference series, this inaugural event focuses on the latest developments and business opportunities within the European CE sector, bringing together international players from across the industry and around the globe.

## Meet the Futuresource Directors



Tony Bicknell



Jim Bottoms



Sarah Carroll



Andrew Snoad

Over the course of the conference we will explore the developments within consumer electronics from the perspectives of digital TV broadcasting, device connectivity, networking and storage, mobile convergence and 3DTV. Market performance across the segments will be examined, and the levels and types of business activity we can expect to see over the next five years will be debated.

This conference is guaranteed to provide you with the knowledge you need at this time of change within the industry. So take in the presentations, discuss potential business ventures, network and share information, and chat with experienced Futuresource analysts and consultants who will be on hand to answer your questions.

## Your Marketplace, Our Focus

Futuresource Consulting is a leading research and knowledge-based consulting company providing expertise in Consumer Electronics, Digital Imaging, Entertainment Media, Broadcast, Optical Manufacturing, Storage Media and IT & Professional sectors.

Combining strong methodologies and unsurpassed data refinement expertise with in-depth market knowledge and experienced forecasting, Futuresource ensures market leading companies have access to the information and insight that helps them to deliver the best possible results.

### Services Provided

- Knowledge-based analysis and forecasts
- Confidential strategy studies
- In-depth market appraisal
- Market intelligence and data management
- Continuous monitoring and tracking
- Business to business surveys
- Consumer research
- Channel/distributor feedback
- Customised research and consulting programmes

### Sectors Covered



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[Blu-rayDisc.com](http://Blu-rayDisc.com)

Available or coming soon to Blu-ray Disc. "Superman Returns" TM & © DC Comics. © & TM Warner Bros. Entertainment Inc. © Disney. © 2007 FOX. © Lionsgate.



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# Conference Agenda

## Day 1: Monday 10 November

### 13:00 Opening Remarks

### 13:10 The Changing CE Landscape

The conference kicks off with a look at how the consumer electronics industry is having to adapt to encompass the increasing influence of the IT world, and the internet in particular.

**Sarah Carroll**, Director of Continuous Services, Futuresource Consulting

### 13:30 SESSION STRAND 1: DIGITAL TV BROADCASTING

#### Session Moderator

**Graeme Packman**, Principal Consultant, Futuresource Consulting

### 13:30 Keynote

The UK has a highly competitive digital TV broadcasting market, with digital terrestrial broadcasting now leading satellite in terms of households served. Cable is some way behind, but still accounts for a healthy percentage of overall penetration. This keynote will highlight the challenges that are still to be faced in the transition from analogue to digital terrestrial broadcasting in the UK, something that will not be completed until 2012, and is further complicated by the likely introduction of terrestrial HD services within the next two years.

**Richard Lindsay-Davies**, Director General, Digital TV Group

### 14:00 Broadcast Platforms Panel

To ensure they achieve maximum coverage in today's highly competitive multi-channel environment, broadcasters are increasingly delivering their content on multiple platforms - including the internet for both simulcasts and 'catch-up services'.

**Jose Luis Garate**, Business Development Manager, SES Astra Iberica

**Andrew Kearney**, VP TV Products, UPC Broadband

**Andrés Armas Portela**, Managing Director, Impulsa TDT

### 15:15 Coffee Break

### 15:45 Broadcast Devices Panel

Europe's multi-platform environment creates a complex situation for TV and set top box manufacturers and their suppliers, who are faced with either creating expensive multi-format pan-European devices or the complex logistical issues, and costs, of servicing different countries' technical requirements. New services such as 'walled garden' internet-delivered programming are also requiring a change to the traditional design architectures.

**Simon Heape**, Senior Marketing Manager TV Pan-Europe, Toshiba

**Laurent Remont**, System Architect Advanced Platform & Strategy Group, ST Microelectronics

**Jean-Claude Sachot**, Director Set Top Box Product Management Group, Thomson

# The Changing CE World

Day 2: Tuesday 11 November

## 16:45 Displays for the B2B Market: a Parallel Universe

While display manufacturers continually seek to reduce the variations in their consumer ranges in order to drive down cost, customisation is the name of the game for the B2B market. This presentation examines how the key vendors in this sector and their partners are tackling a wide range of customisation issues whilst at the same time maintaining their competitive edge.

**Mike Fisher**, Head of Professional and IT Division, Futuresource Consulting

## 17:05 Counterfeiting, Trademark and Design

The fast moving world of consumer electronics faces huge annual losses through counterfeit goods, trademark violations and design infringements. This presentation provides an insight into the challenges faced by companies operating in the CE industry and outlines some of the steps that can be taken.

**Katharine Stephens**, Joint Head of Intellectual Property Department, Bird & Bird

## 17:30 Close of Day 1

## 18:00 Cocktail Reception

## 09:00 Welcome Back

## 09:15 SESSION STRAND 2: CONNECTIVITY, NETWORKING AND STORAGE

### Session Moderator

**John Bird**, Principal Consultant,  
Futuresource Consulting

## 09:15 Keynote

Panasonic's business has for many years embraced consumer electronics, IT and storage, so the company should be well-equipped for this era of increasing convergence. One of Panasonic's key visionaries - who has been closely involved with the launch of the Blu-ray Disc, amongst other achievements - provides some insights into the future for the consumer electronics industry.

**Eisuke Tsuyuzaki**, Vice President, Corporate Development & General Manager, Panasonic

# Conference Agenda

## Day 2: Tuesday 11 November

### 09:45 Online Services Panel

A growing number of TVs, set top boxes and other CE devices are being fitted with a network connection that enables them to access the internet directly, bypassing the PC. This is providing exciting new opportunities for content owners, service providers and those who provide the enabling technologies.

**Richard Bullwinkle**, Corporate Strategy, Macrovision

**David Whittaker**, Director of Business Development and Advanced Technologies, NDS

### 10:30 Coffee Break

### 11:00 Connected Devices Panel

Digital home networks seamlessly integrated with the internet have been discussed for years, but they are a complex proposition to implement, and not only for consumers. Numerous incompatible standards in all aspects of networking - from connectivity to file formats to digital rights management - make the creation of a 'plug and play' home network a significant challenge for all sides of the industry.

**Johan Craeybeckx**, CTO, Testronic Labs

**Gabriele Mayer**, Retail Storage Market Analyst and Product Marketing Manager, Seagate

**Adrian Northover-Smith**, Digital Development Manager, Sony UK

**Frank Simonis**, Chair of the Europe Promotions Group, Blu-ray Disc Association

### 12:00 Futuresource presentation

As a preface to the 'Mobile Convergence' session, Futuresource draws on its extensive research and analysis to assess the potential for the growing range of handheld devices vying to become the main mobile platform in the future.

**John Bird**, Principal Consultant, Futuresource Consulting

### 12:30 Lunch

### 14:00 SESSION STRAND 3: MOBILE CONVERGENCE

#### Session Moderator

**Simon Bryant**, Principal Consultant Consumer Electronics, Futuresource Consulting

### 14:00 Keynote

A leading mobile operator's perspective of the changing needs for handsets and other wireless hardware that is being driven by new multimedia offerings such as music, video and mobile television, as well as location-based services.

**Juan Latasa**, Head of Strategic Projects, Vodafone

# The Changing CE World

## 14:30 Content on the Move

Portable Media Player (PMP) functionality is now being added to a whole range of devices, including mobile phones, games consoles and the new generation of Ultra-Mobile PCs. Can these devices compete with dedicated PMPs, or even ultimately replace them?

## 14:50 The User Interface

As technical complexity increases it becomes ever more critical to ensure that user interfaces are simple and intuitive. A leading European cross platform design agency provides some insights into how this can be achieved.

**Chris Liu**, Managing Director, Fjord

## 15:10 Panel Discussion: Engaging the Consumer

A group of speakers from the preceding sessions will discuss the challenges of getting the convergence message across to mainstream consumers.

## 15:40 Coffee Break

## 16:10 SESSION STRAND 4: 3D

### Session Moderator

**Bill Foster**, Senior Technology Consultant, Futuresource Consulting

## 16:10 Panel: Adding a New Dimension to TV and Video

3D has become a major driver for Digital Cinema and there is no question that, with more than two-thirds of its revenues derived from post-box office sales, Hollywood will be looking for an early uptake of 3D in broadcasting and home video. However, a handful of movies each year will not drive the market on its own and additional content will need to come from other sources.

**Ami Dror**, EVP of Business Development, XpanD

**Manuel R. Gutierrez Novelo**, President and CEO, TDVision

**Colin Smith**, Technical Producer, ITV Future Technologies

## 17:20 Closing Remarks

## 17:30 Conference Close



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## Dolby Technologies for Converging Entertainment

The world of consumer entertainment is changing. For instance, a phone is no longer just a calling device, but also an MP3 player, a camera, a storage device, an internet browser.

Consumers are increasingly demanding entertainment and information to suit their needs and lifestyle - whether it's watching TV on a portable media player, listening to music on their mobile phone or gaming on a PC via the internet - with the abundance of products and services available, they can afford to be choosy. They want value for money but do not want to compromise on quality.

For years, Dolby Laboratories has defined the surround sound experience and set the bar for audio excellence in cinema, broadcast and entertainment in the home. Today, no matter what device the viewer chooses, or which transmission path is used to receive the content, Dolby provides clear solutions for evolving entertainment. The company offers a complete path that conveys the original intent of the content creator, providing a choice of technologies to deliver great entertainment to multiple platforms.

Dolby's suite of audio technologies deliver compelling audio optimized for a range of devices and applications, including high-definition televisions and set-top boxes, broadcast services with highly constrained bandwidth, online content services/portals and package high-definition media. Dolby's technologies ensure that they bring high quality, spacious, realistic surround sound irrespective of the device or delivery method used.

As a provider of products and technologies to enable an end-to-end solution, Dolby's goal has always been to provide a seamless transmission path throughout the entertainment delivery chain, from content creation to delivery to playback.

So today, no matter what device the viewer chooses or which transmission path is used to receive the content, Dolby provides a clear solution to deliver the enhanced entertainment experience that consumers demand from digital content.



# Driving Digital Content

4 - 5 June 2009  
London UK

Now in its third year, 'Driving Digital Content' has established itself as a key event in the industry calendar.

- Focusing on the business opportunities presented by the continued rise of digital content delivery
- Developing and sustaining the consumer proposition
- The cross platform content opportunities
- Turning media push into commercial reality
- The changing shape of content/hardware relationships
- Who controls the living room?

For more on this event, visit:

[www.futuresource-consulting.com/events](http://www.futuresource-consulting.com/events)



## New Industry Report: Home Entertainment sales on track for growth despite downturn



Sarah Carroll  
Director,  
Continuous Services,  
Futuresource

Across much of the globe, financial reporting has shown a fall in lending, heavy deceleration within construction, utilities and manufacturing, and repercussions across the breadth of the economy. However, in times of economic hardship we've seen consumer electronics and in-home entertainment weather the storm.

Much of it hinges around the 'staycation' attitude. Rather than going on vacation or dining out, consumers see the purchase of hot new 'must have' electronics items like Blu-ray players, flat panel TVs or smart phones as a far better value-for-money option. The tangible benefits of these products can be enjoyed for a long time to come and are seen by many as essential items once the retreat into the living room begins.

Futuresource research from the economic slump of 2001 reveals digital cameras and DVD players continued to grow sharply when the economy stagnated, giving a clear indication that home entertainment can ride the storm. Stretching the timeline backwards further, during the economic downturn of the early 1980s, sales of VCRs in the UK rocketed, growing by 440% between 1980 and 1983.

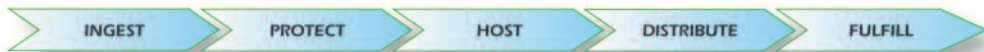
Our market analysis shows markets for flat panel HDTVs and Blu-ray disc players will continue to expand in Europe and the USA. In Western Europe the TV market is holding up well, with overall volume growth of 6% predicted for this year. Significant price reductions of up to 25% in the larger screen (42"+) categories are fuelling interest amongst first time buyers, and many European consumers are looking to upgrade their bedroom or kitchen CRT sets to an LCD display.

The growth pattern is similar for the Blu-ray disc player market, with our projections showing player shipments to Europe's top five markets more than tripling between 2008 and 2009, to reach in excess of 1.8 million standalone players shipped in 2009.

A new industry report from Futuresource looks at the impact of recession on the consumer electronics industry. For more information or to purchase the full report contact Futuresource Consulting at E: [info@futuresource-hq.com](mailto:info@futuresource-hq.com) T: +44 (0)1582 500 100.



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