



HDTV-across-Europe Conference

International HDTV Summit

Berlin, 14th & 15th October 2008



HDTV-across-Europe Conference

International HDTV Summit

■ **To be held on**

14th & 15th October 2008

■ **Venue**

The Deutsche Telekom
Conference Centre,
Französische Straße 33 a-c,
10117 Berlin

■ **Congress Language**

English

■ **Sponsorship**

Bitkom & Intellect are most grateful for the financial assistance provided by Deutsche Telekom, Sony, SES ASTRA and Humax-Digital, without whose help this event could not have been mounted for the overall benefit of the European HDTV industry.



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➤ amiando.de/hdtv

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Message of greeting



from the Federal Minister of Economics and Technology
Michael Glos MdB
on the occasion of the 2008 HDTV Summit

ICT – these three letters stand for one of the driving forces of our economy. The information, communication and entertainment industries, together with the consumer electronics industry, are among the fastest-growing industrial sectors in most European countries today.

In this connection, high-definition television (HDTV) is of special significance. Current market analyses show that HDTV accounts for over 25 billion euros of the overall annual market for information and communications technology, with over 30 million HD-ready television sets sold annually in the 27 European Union member states. These figures reflect the high level of consumer interest in high-definition television.

The transition to high-definition television is a technological milestone that is comparable in significance to the introduction of colour television in 1969. In Germany as well, the introduction of high-definition television represents the logical completion of a process leading from the digitisation of broadcasting systems to higher image quality that will ultimately benefit every television viewer. The Federal Ministry of Economics and Technology supports this process through a broad range of coordinating functions that incorporate all stakeholders, with the aim of completing this transition both rapidly and thoroughly.

I therefore strongly welcome the joint initiative between BITKOM and other European partner organisations, and I wish this Summit the best of success.

Sincerely,

Michael Glos
Federal Minister of Economics and Technology

Congress Description

The German Association for Information Technology, Telecommunications and New Media – BITKOM – and its UK based sister trade association **Intellect** devote a 2-day international summit forum to the topic of **HDTV-across-Europe**. The overall objective is to paint a pan european picture of the High-Definition TV market situation and the status of technology.

The following key aspects will be considered

- Market volumes and turnover potential
- Roll-out plans of different European countries
- Technological aspects and DRM
- HD-content delivery platforms
- Traditional forms: terrestrial, cable, satellite
- New forms: IP-TV, HD-Downloads, Video-on-Demand
- HDTV and its integration into Smart-Homes and Intelligent Business Environments
- Visions of future entertainment for the next 10 years

The High-Definition TV markets will be explored and assessed from different points of view: from the industry as well as broadcasters, manufacturers, customers and retail. Another focus will be on marketing aspects and the communication to the end user.

BITKOM and Intellect prepared the congress using their extensive network of contacts including those available from both organisations' membership of EICTA, the European Information and Communications Technology Industry Association and together with 30 Top-speakers from different countries.

The HDTV summit forum will therefore be of interest, for example, to

- Consumer Electronics and IT Companies
- Broadcasters, Service and Content Providers
- Smart Home Developers and Installers
- Consultants and Marketing Agencies
- Retailers and Distributors, and to
- Executives whose responsibilities relate in some way to any of the multiple plans for HDTV roll-out across Europe.

❖ **Book your tickets here**

 amiando.de/hdtv

Agenda

day 1

a.m.

The overall market opportunity & progress with roll-out

Chairmen: **Prof. Dr. Dres.h.c. Arnold Picot**, Institute for Information, Organization and Management, Munich School of Management, Ludwig-Maximilians-Universität München, **Dr. Mario Tobias**, Member of the BITKOM Executive Board

BITKOM / Intellect
HDTV-across-Europe

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10:00

Opening

Gerold Reichle, Director-General of Department Technology Policy at the Federal Ministry of Economics and Technology, Germany

10:15

BITKOM Welcome – Short Introduction

Jeffry van Ede, Member of the BITKOM Presiding Committee, Managing Director Sony Deutschland GmbH

10:35

HDTV Market Projections for Europe

Ben Keen, Chief Analyst Screen Digest

10:55

Supply-Demand Challenges in the Euro High Definition Markets

- HD at different points in the TV supply chain
- Developments in the set top box market
- Demand for HD content via IPTV
- The trends in demand for TV technology and screen size

Andrew Murray, Senior Director, Display Systems, iSuppli Corporation UK

11:15

Questions and Answers

11:25

Coffee Break

11:45

HDTV – State of the Art and Perspectives for European Public Broadcasters

- HDTV technology strategies of European public broadcasters
- Options for production, distribution and consumer technology
- Standards work
- Future aspects

Dr. Hans Hoffmann, Senior Engineer EBU TECHNICAL

...day 1

p.m.

- 12:10 **The Digital Switchover in Europe – a European Commission perspective**
- The deadline of 2012 for switch-off of analogue terrestrial TV in the EU
 - State of play in Member States
 - The re-use of analogue spectrum
 - The introduction of new broadcast services such as HDTV and mobile TV
- Dr. Andreas Röver, Administrator, European Commission, Digital Broadcasting
- 12:30 **HDTV and beyond – Technologies for tomorrow's entertainment**
- Current and future video formats
 - Compression technologies for HDTV and future formats
 - 3D and immersive video
- Dr. Ralf Schäfer, Head of the Image Processing Department, Fraunhofer Institute for Telecommunications
- 12:50 **Questions and Answers**
- 12:55 **3D-HD: A short demonstration**
- Axel Holst, MikroM GmbH
- 13:00 **Lunch**
- 14:00 **Closing the gap between HDTV and the customer**
- Prof. Dr. Dres. h.c. Arnold Picot, Institute for Information, Organization and Management, Munich School of Management, Ludwig-Maximilians-Universität München
- 14:15 **HD Scenario in Europe and Outlook 2010**
- Key countries
 - Drivers for a successful HD-Story
 - Lessons learned
- Wolfgang Elsässer, Managing Director of ASTRA Germany GmbH, the German subsidiary of satellite operator SES ASTRA

...day 1

p.m.

14:40

The international availability of HD-Content – a market survey

- High quality content is produced in HD since the beginning of the decade
- Content owners – producers and broadcasters – all have a significant HD archive
- HDTV in the USA comes with the digitization of broadcast
- The UK shows, that HD crosses the borders towards Free TV
- In Germany HD will take up after 2010

Klaus Böhm,
Director, Head of the Media Practice of Deloitte Consulting

15:00

The Set-Top-Box as a key product for HDTV

- It is technology rather than content which is driving HDTV in Germany
- Set-Top-Box as key device for Digital Television today, HDTV a logical next step
- Set-Top-Box combining content, operator and customer within a PayTV market

Franz Simais, CEO Humax Digital GmbH

15:20

Questions and Answers

15:35

Coffee Break

16:00

First experiences with widescale HDTV broadcasting in Austria and the customer experience

- Technical Demands
- The availability of Content
- Response of the retailers and customers

DI Norbert Grill, Managing Director, Austrian Broadcasting Services

16:25

Prospects for free-to-air HDTV in Europe

- Launch of Terrestrial HDTV
- Launch of Satellite-TV
- Barriers to entry (Regulatory, Costs, Standards, Programme Rights)

Dermot Nolan,
Director of Telecommunications & Broadcast Services (TBS)

...day 1

p.m.

■ 16:50

Panel Discussion 'HDTV as a Market Opportunity' and Summing Up

Herbert Tillmann,
Technical Director of Bayerischer Rundfunk

DI Norbert Grill,
Managing Director, Austrian Broadcasting Services

Dr. Hans Hoffmann,
Senior Engineer EBU TECHNICAL

Dermot Nolan,
Director of Telecommunications & Broadcast Services (TBS)

Wolfgang Elsässer,
Managing Director of ASTRA Germany GmbH,
the German subsidiary of satellite operator SES ASTRA

Oliver Kaltner,
Chief Marketing and Sales Officer, Premiere AG, Munich

Jeffrey van Ede,
Member of the BITKOM Presiding Committee,
Managing Director Sony Deutschland GmbH

■ 18:00

Get Together

day 2

HDTV deployment scenarios & future directions

Chairman: **Laurence Harrison**, Director Consumer Electronics, Intellect

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a.m.

09:00

Does the user accept HD content?

- HD programming on IPTV
- Usage data & lessons learned
- Where is the content?
- HD roadmap on T-Home Entertain

Michael Ortlepp, Executive Producer IPTV / Videoload,
IPTV Products & Innovation Deutsche Telekom AG

09:25

Global Momentum Building for Connected TV

- The connected TV Landscape worldwide
- The most appealing business opportunities

Hilke Panzner Fredheim, Customer Marketing Manager, EMEA for
Microsoft Corporation's Connected TV Division

09:50

VoD, IPTV and HDTV – Market development in Germany and Europe

- HD: Key driver of digitization?
- After the format war: Full speed ahead for HD media?
- Video on demand: Success story or niche market?
- IPTV market overview – IPTV=Premium, TV=HDTV?

Prof. Dr. Klaus Goldhammer, Managing Director of Goldmedia
Sales & Services GmbH and of Goldmedia Custom Research GmbH

10:15

Questions and Answers

10:30

Coffee Break

...day 2

a.m.

- **11:00** **Satellite and DSL: Combining the Best of Both Worlds**
- Why satellite HDTV will deliver the best consumer experience
 - Customized value-added services come via DSL: catch-up TV, EPG and web content
 - Hybrid set-top-boxes: a win-win scenario for consumers, broadcasters and manufacturers
 - Presentation of technology candidates: why standardization will be a key success factor
- Thomas Wrede,**
Vice President, Product Management Media at SES ASTRA

- **11:25** **Digital Rights Management for Premium Video Content**
- What can we learn from the music business?
 - Open standards vs. proprietary systems
 - What's in it for the consumer? Some Trends in DRM
- Dr. Wilms Buhse, Executive Director Coremedia AG**

- **11:50** **Business Transformation with HD Videoconferencing**
- HD Video communication and collaboration in the enterprise
 - Business value of HD Videoconferencing
- Drew Burns, Director, Cisco Internet Business Solutions Group (IBSG)**

- **12:15** **Questions and Answers**

- **12:20** **Lunch**

- **13:20** **Beyond HD – The next steps in HD technology**
- Progressive formats and 1080p 50/60 as a common production standard
 - 4k Workflow: 4 times HD – Where are we right now
 - Beyond 4k Ultra High Definition – A perspective look into the future
- Goran Hantschel, Head of the Sony Professional Business in German**

- **14:00** **Breaking the low margin dead-lock on HDTV**
- Avoiding the commodity sale
 - Value add through connected products
- Carl Gressum, Principal Advisor, Premonvision**

...day 2

p.m.

■ 14:30

The next 520 weeks: future aspects of High-Definition Entertainment

- How IP-TV will look like in ten years from now
- Advertising 2.0 – how proximity and intelligence will change the look and feel of advertising
- Technological outlook: Hardware, Software and Services in 2018

Lars Thomsen, CEO of Future Matters

■ 15:00

Panel Discussion

Summing up for the Congress, the current 'health' of HDTV & possible 'next steps' options for Bitkom/Intellect

Dr. Andreas Berezcky,
Executive Vice President of Production and Engineering at
Germany's largest TV Broadcaster, ZDF German Television

Lars Thomsen,
CEO of Future Matters

Prof. Dr. Klaus Goldhammer,
Managing Director of Goldmedia Sales & Services GmbH and
of Goldmedia Custom Research GmbH

Hilke Panzner Fredheim,
Customer Marketing Manager, EMEA for Microsoft Corporations
Connected TV Division

Carl Gressum,
Principal Advisor Premonvision

Dr. Willms Buhse,
Executive Director Coremedia AG

Goran Hantschel,
Head of the Sony Professional Business in Germany

■ 16:00

End

Speakers

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Dr. Andreas Berezcky

Executive Vice President of Production and Engineering at Germany's largest TV Broadcaster, ZDF German Television



Dr. Berezcky was born in 1953 in Budapest, Hungary. After qualifying as a motor electrician and aircraft engineer,

Dr. Berezcky emigrated to Germany in 1974. In 1982 he earned a Masters Degree in Aircraft Engineering from the Technical University of Aachen (RWTH). This was followed in 1985 by a PhD from the Research Institute of Juelich.

From 1985 to 1989 he was Chief of Consulting Services with Bull Computers in Cologne. He then joined debis IT Services, a division of the DaimlerChrysler Group, where he held numerous management positions; becoming Managing Director of debis Systemhaus GEI in 2000. Following the merger of debis Systemhaus and T-Systems in 2001, Dr. Berezcky took over as one of the four Managing Directors of T-Systems Service Line Systems Integration with a turnover of 2 Billion € per annum.

Since 1st of January 2004, Dr. Berezcky holds the position of Executive Vice President of Production and Engineering at Germany's largest TV Broadcaster, ZDF German Television. His experiences in industry

are being put to good use in dealing with the conflicting priorities of quality and economical orientation in programme-making; as well as in the necessary reorientation of ZDF's Production and Technology Department in a changing and extremely competitive market.

Dr. Berezcky is a member of the Supervisory Boards of the companies Software AG and Alfabet AG. He is also a member of the Research Circle *Münchner Kreis*. In 2005 he was awarded the National Leadership Award in IT Services and Multimedia from the German Economic Forum. Since June 2006 Dr. Berezcky holds the position of Deputy President and Chief Executive Officer of the *Deutsche TV Plattform*. This is a consortium of companies and bodies which concerns itself with the introduction of digital broadcasting.

Dr. Berezcky lives with his wife and daughter in Eschweiler, Germany.

Klaus Böhm

Director, Head of the Media Practice of Deloitte Consulting



Klaus Böhm, Director, leads the Media Practice of Deloitte Consulting. Deloitte is one of Germany's leading

audit and consulting firms offering a full range of services combining audit, tax, consulting and

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corporate finance. 4,000 people in 18 offices have been serving companies and institutions of all kind – for 100 years. Deloitte is represented by the Deloitte Touche Tohmatsu network in nearly 140 countries worldwide with 150,000 people. Klaus is a highly experienced manager in the media industry. He has worked for over twelve years with different blue chip companies like RTL Group, Bertelsmann, QVC and NBC Europe. Klaus gained his expertise in the areas of program, technology, strategy and operations. Before joining Deloitte Consulting, Klaus managed a company of RTL. He prepared and implemented the broadcaster's presence on new digital platforms like mobile entertainment, broadband, satellite and cable.

Curriculum Vitae

Born 18th January 1967 in Nürnberg

- **Since Apr 2006**
Media Expert,
Deloitte Consulting, Düsseldorf
- **Since Jul 2008**
Director
- **Jan 2004 – Mar 2006**
Senior Vice President Broadcasting Center Europe, RTL Group, Luxembourg
- **Nov 2001 – Dec 2003**
Vice President Business Development, RTL Group, Luxembourg
- **Mar 2000 – Nov 2001**
Project Manager Corporate Business Affaires, RTL Group, Luxembourg
- **Oct 1998 – Feb 2000**

Commercial / Finance Manager,
NBC Europe, London / Düsseldorf

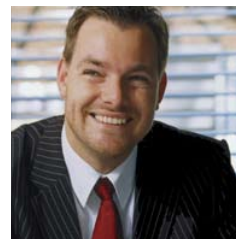
- **May 1997 – Sep 1998**
Head of Station Management,
Deutsche Fernseh Nachrichten
Agentur, Düsseldorf
- **May 1995 – Nov 1996**
Producer, Hamburg 1, Hamburg
- **1991 – 1994**
Journalist

Education

- **1988 – 1993**
University of Tübingen, Master in
Economics and Econometrics
- **1994 – 1997**
University of Hamburg, post-
graduate studies Finance and
Economics

Dr. Willms Buhse

Executive Director Coremedia AG



Since 2002, Dr. Willms Buhse is responsible for Core Media's marketing and communications. He is strongly

involved in CoreMedia's change process to an Enterprise 2.0. Previously, Dr. Willms Buhse was working over five years for Bertelsmann in the field of technology strategy and is co-founder of Digital World Services in New York.

Dr. Buhse is an author and editor of several books. Just recently, he co-published the book *Enterprise 2.0 – The art of letting go* with articles by renowned international authors

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and case studies from Nokia, SAP, Vodafone and many more.

Drew Burns

Director, Cisco Internet Business Solutions Group (IBSG)



Drew Burns is Director with Cisco's Internet Business Solutions Group and the leader of the Innovation

team's Communication and Collaboration practice. In this role, Drew consults with clients on utilizing Internet-enabled technology to optimize communications and workforce productivity. Specific areas of focus include unified communications, collaboration, TelePresence, and executive communications.

Drew has over 15 years of U.S. and international experience in the Human Resources and Communication field, both as a practitioner and a consultant. Before joining the IBSG team, Drew was a member of Cisco's EMEA HR group in London, England. In this role, Drew supported a number of Cisco's European businesses, including the Mobile and Service Provider groups.

Prior to Cisco, Drew was VP, HR for Dun & Bradstreet's businesses in Asia Pacific and Latin America. During this time, Drew developed new employee communication programs, while also assisting in the

acquisition and divestiture of several international businesses.

Before Dun & Bradstreet, Drew worked as a consultant at Hewitt Associates, focusing on employee communication, executive compensation, and international mergers and acquisitions.

Drew began his career in finance with General Electric and GE Capital, based in Europe and the U.S.

Drew holds a B.A. in economics from the University of Notre Dame and an MBA in finance from Columbia University.

Jeffry van Ede

Member of the BITKOM Presiding Committee, Managing Director Sony Deutschland GmbH



Jeffry van Ede started working for Sony in 1991. With a strong background in the areas of electronic en-

gineering, retail entrepreneurship, finance, economics and marketing, his career in Sony Netherlands progressed through disciplines such as Service, Sales and Marketing. In 1996, Jeffry van Ede took on a European role as Marketing Manager for Home Audio products at Sony Europe. Over the seven years that followed, he held various positions before he was appointed Director

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of Sony Europe's Home Audio and Home Video businesses. In 2003, Jeffry van Ede returned to local country management as Operations Head at Sony Benelux concurrent to the position of Statutory Director. Being in charge of all operations including Service, Logistics, Sales Office and IS, and later on of Finance & Control as CFO, van Ede led Sony Benelux through a significant restructuring phase. After successful completion, Jeffry van Ede was appointed Vice President of Audio Marketing Europe in April 2006, where he was one of the leading drivers to revitalise this segment by strategizing the launch of key hardware and software products for the European market. Since January 2008, Jeffry van Ede is responsible for Sony's electronics business in Germany as Managing Director Sony Germany, based in Berlin.

Wolfgang Elsässer

Managing Director of ASTRA Germany GmbH, the German subsidiary of satellite operator SES ASTRA



As managing director of ASTRA Germany GmbH, the German subsidiary of satellite operator SES ASTRA based

in Luxembourg, Wolfgang Elsässer amongst others answers for market partner liaisons and support as well as marketing in Germany, Austria and Switzerland. He holds an MBA

and has gained lots of practical experience in the areas of sales and marketing. As Head of Sales at Premiere he was responsible for the new alignment of the company concerning cost reduction and customer acquisition / care in the Pay TV segment. Beforehand – after his studies focusing on international marketing and international sales – he worked at Grundig AG for several years, in a final step as Marketing Director, Head of Sales and Authorized Officer, afterwards moving to Betaresearch as Head of Marketing and Sales. Since April 1, 2005 he also takes the responsibility for commercial sales and marketing of platform services and solutions such as playout, multiplex, uplink, encoding as well as interactive applications to broadcasters, platform and cable operators as part of the management board at APS ASTRA Platform Services GmbH in Unterföhring near Munich – former DPC digital Playout Center GmbH.

Hilke Panzner Fredheim

Customer Marketing Manager, EMEA for Microsoft Corporation's Connected TV Division



Hilke Panzer Fredheim brings almost 10 years of telecommunication and media industry experience to

her role as Customer Marketing Manager, EMEA for Microsoft Cor-

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porations connected TV Division. Ms. Panzner Fredheim is responsible for developing and implementing all customer marketing programs for the Microsoft Mediaroom products. Additionally, Ms. Panzner Fredheim works closely with Deutsche Telekom – Germany, a Deutsche Telekom’s subsidiary Swisscom, and a number of other customers in the EMEA region. In this role, she is primarily focused with the development, support, and execution of joint co-marketing programs as well as providing support to Microsoft’s customers in the best way to accelerate subscriber growth as well as managing their respective market development funds. Prior to assuming her current role, Ms. Panzner Fredheim was the Business Development Manager for Microsoft’s customer relationship with T-Online and T-Mobile (now Deutsche Telekom), responsible for negotiating commercial contracts with these Microsoft customer in 2006.

Prior to joining Microsoft in 2004, Hilke Panzner Fredheim was a consultant at Sapient, responsible for overseeing IT implementation, front-end design, and strategic consultancy. Earlier in her career, Ms. Panzner Fredheim worked as a consultant at AT Kearney.

Hilke Panzner Fredheim holds a bachelor’s degree in business administration and engineering from University of Stuttgart. Ms. Panzner Fredheim was one of the founding members – together with 25 col-

leagues from AT Kearney, Boston Consulting and McKinsey – of the Launchgroup, a consultancy focusing on E-Business, Media, and Telecommunication.

Prof. Dr. Klaus Goldhammer

Managing Director of Goldmedia Sales & Services GmbH and of Goldmedia Custom Research GMBH



Klaus Goldhammer, born in 1967, founded Goldmedia GmbH Media Consulting & Research in 1998. Goldmedia

offers to its clients a broad range of consulting services in the fields of media, entertainment and telecommunications. Goldmedia offers in-depth analyses of markets and competitors as well as strategic advice and hands on business development. Additionally, in 2004 Klaus founded Goldmedia Sales & Services and in 2007 Goldmedia Custom Research.

From 1996 to 1999 Klaus worked as an independent business and media consultant with a special interest in radio, digital TV and interactive entertainment. He also worked as managing editor of the European Communication Council (ECC), responsible for several reports on media trends and Internet economics. Before that he was PR Consultant for Kohtes & Klewes Public Relations GmbH and for several years

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he worked as a media journalist for several newspapers and magazines.

Klaus Goldhammer regularly lectures on topics concerning broadcasting and new media at universities. From 2004 to 2007 he was a professor for media economics and mass communication at Freie Universität Berlin, from 2003 to 2004 at Rheinische Fachhochschule in Cologne and from 2004–2005 at University of Basel.

His academical career started in Berlin and London where he earned his degree in journalism and management.

Carl Gressum

Principal Advisor, Premonvision



Carl Gressum is Premonvision's Principal Advisor, focusing on the market place of Internet services, and service

delivery platforms. He works extensively with Internet access providers across the world on their residential market strategies, and with consumer electronics and IT vendors on their approaches to an Internet enabled market place.

As a lead industry figure he is often quoted in technology as well as main stream press, as well as serving as expert advisor for leading broadcasters, and is a sought after

presenter for conferences and industry panels.

Prior to his work at Premonvision Carl Gressum established Ovum's ConnectedHome advisory service, and built up Ovum's name in the consumer electronics space. He also has a background from Canalsys, which he joined to start up their Digital Home Analysis service. He has also worked in the online consumer electronics retail channel in France as a Norwegian Country Manager. He holds a Master of Business Economics from the Norwegian School of Management BI in Oslo, Norway, where parts of his Master was taken at the MBA of Carlsson School of Management, Minneapolis, USA.

DI Norbert Grill

Managing Director,
Austrian Broadcasting Services



Norbert Grill became Managing Director of Österreichische Rundfunksender GmbH & Co KG (Austrian Broad-

casting Services) in January 2008 after having led the division *dvb systems* since January 2005.

He graduated in control engineering and automation from the Vienna University of Technology (Austria). He worked in the project department for Andritz-Sprout-Bauer (now Andritz AG) for more than three

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years before he became the project leader of the division *digital systems* at the Austrian Broadcasting Corporation (ORF) in February 1999.

Norbert Grill has longtime experience in the area of telecommunications and electronic systems. He took part in several professional trainings with focus on technical developments, business administration and general management.

Goran Hantschel

Head of the Sony Professional Business in Germany



Goran Hantschel is head of the Sony Professional Business in Germany. He manages the division responsible

for products and solutions in the areas of broadcast, medical, A/V technologies, digital cinema, photo-finiting and video monitoring. Before his current role, he was responsible for the Sony Professional Business in Austria for several years and had previous management roles within IBM and T-Systems.

Laurence Harrison

Director, Consumer Electronics, Intellect



Laurence is responsible for developing and promoting Intellect's programme of activities for our

consumer electronics manufacturer members. This includes running Intellect's work related to Digital TV Switchover, the growth of DAB Digital Radio, the impact of digital convergence and the energy efficiency of devices.

Laurence sits on the board of Digital UK, chairs the Digital TV Supply Chain Group, is a member of the Digital Radio Working Group and helps run Intellect's series of Convergence Conversation events. He also has overall responsibility for Intellect's work in the areas of energy and environment, wireless spectrum, satellite, next generation broadband, intellectual property, trade policy, and electronics components and manufacturing.

Laurence has extensive experience of working within trade associations and providing services and representation for member companies. Prior to joining Intellect Laurence worked for the CBI where he had responsibility for representing SME and trade association members.

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Dr. Hans Hoffmann

Senior Engineer, EBU TECHNICAL



Hans Hoffmann was born in 1964 in Munich. He holds a PhD from the Brunel University West London. He has

worked in the Insitut fuer Rundfunktechnik from 1993 until 2000 in research and development for new Television production technologies. In 2000 he moved as Senior Engineer to the Technical Department of the European Broadcasting Union in Geneva. He has chaired the EBU project groups P / BRRTV and P / PITV which both were involved in standardization activities like SDTI and File Formats and actively participated in the SMPTE engineering meetings; chaired the SMPTE technology committee on Networks and File Management and was appointed as Engineering Director Television in the SMPTE. He has been the leading figure in the EBU activities on High Definition in the Television Production and Emission side. Currently he is a co-chair of the joint EBU / SMPTE Task Force on Time and Sync; he is a fellow of the SMPTE, member of the IEEE and FKT and SID.

Oliver Kaltner

Chief Marketing and Sales Officer, Premiere AG, Munich

**Personal Information**

■ **Date of Birth**
Born Nov 28, 1968 in Wiesbaden, Germany

Professional Steps

- **Since 07/08**
Premiere AG, Munich, Germany, Chief Marketing and Sales Officer
- **03/05 – 06/08**
Sony Deutschland GmbH, Berlin, Germany, Marketing Director Consumer Electronics and IT / Procurator, Member of the Sony Germany Management Board
- **11/04 – 02/05**
Sony BMG Music Entertainment, London / Berlin, Vice President Business Development Germany and Continental Europe
- **05/03 – 10/04**
Sony Music Entertainment GmbH, Berlin, Germany, Managing Director Sony Music Media Germany, Switzerland, Austria
- **05/99 – 05/03**
Electronic Arts GmbH, Cologne, Germany, Marketing Director Central Region
- **10/98 – 03/99**
Steilmann GmbH & CO. KG, Bochum, Germany, Trade Marketing Director

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- 05/99 – 05/03
Nike International Germany,
Mörfelden, Germany,
Trade Development Manager
- 06/97 – 03/98
Nike World Headquarter, Beaver-
ton, United States of America,
Global Visual Marketing
Manager
- 01/97 – 06/97
Nike Central Europe, Mörfelden,
Germany,
Retail Marketing Manager for
Germany, Austria, Switzerland
- 04/96 – 12/96
Nike International Germany, Mör-
felden, Germany,
Retail Marketing Manager
- 03/94 – 03/96
Nike International Germany, Mör-
felden, Germany,
Retail Marketing Manager
- 03/93 – 09/93
HMS Media-Consulting, Wiesba-
den, Germany,
Media Planning Assistant

Further Activities

- 04/04 – 06/08
Head of Sony Marketing Task
Force (SMTF)
Key target: Union of the 7 Ger-
man Sony sister companies and
their performance features
- 03/07 – 12/07
Participant in *Sony Europe Senior
Leadership Development Pro-
gramme*
- 11/07 – 06/08
Head of steering committee
*Competence area Consumer Elec-
tronic & Digital Home* of BITKOM
(German Association for Informa-

tion Technology,
Telecommunications and New
Media e. V.)

- 09/07 – 06/08
Head of working group
Digital Home of BITKOM
- 02/06 – 11/07
Deputy chairman of the board
of Noshokaty, Döring & Thun
GmbH, Berlin, Germany

University

- 1989 – 1993
Business administration at the
University of Applied Science
Rheinland-Pfalz, Title: *Diplom
Betriebswirt*, Dissertation subject:
*Changes of the media landscape
due to the admission of private TV
channels*

Ben Keen

Chief Analyst Screen Digest



Ben Keen is Chief Analyst respon-
sible for leading
Screen Digest's
research and
consulting activi-
ties. With more

than 20 years experience in media
industry research, he is a leading
authority on all aspects of screen-
based media, particularly digital
and interactive media. Additionally,
since 1988 Ben has been retained as
advisor to the government-industry
liaison organisation, the British
Screen Advisory Council (BSAC).

Ben has led the Screen Digest teams

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that have undertaken consultancy projects for more than 70 different international clients. Consulting assignments have included projects for the British government, pay TV broadcasters, major Hollywood studios, top video games publishers, several leading private equity groups, a digital cinema consortium, a leading chip-set designer, and a top-three computer manufacturer. Ben has contributed to over 25 different books and periodicals and has spoken at more than 200 international conferences and seminars. He holds a 1st class BSc degree, followed by PhD research at Imperial College, London.

Jim Munro

Senior Radio Programme Manager,
Intellect



R. J. (Jim) Munro graduated B.Sc. (Hons.) in Electrical Engineering from Aberdeen University, Scotland. His 40+ years career in industry has progressed from graduate apprentice with Plessey Telecommunications, Liverpool to a senior management role with Intellect, the UK Trade Association. On the way it has encompassed extensive senior level telecommunications experience with such firms as GE Information Services (USA) and Nortel (Canada). Jim also held Head of Systems roles

with Hertz and HFC Trust, also Product & Project Management positions with Arbat (UK). He has worked in many world locations, from Sydney to Hong Kong to New York, also in Germany.

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Andrew Murray

Senior Director, Display Systems,
iSuppli Corporation UK



At iSuppli, Andrew is responsible for global Display Systems research and all areas of electronic display market research in Europe, in support of project teams based in San Jose. The scope of his work includes all types of display technologies, primarily focusing on shipments of display systems into distribution channels at the national level, and also covering display component and system research, development, and production across Europe.

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Dermot Nolan

Director of Telecommunications & Broadcast Services (TBS)



Dermot Nolan is a Director of Telecommunications & Broadcast Services (TBS), based in London UK. Prior

to that he was Director General of the UK Digital Television Group, the UK trade association for digital television, and also held a non-executive directorship of a new US innovative wireless semiconductor business. Previously he worked for a number of major consultancy companies including CDG, PWC, Deloitte Haskins & Sells, and Logica. He has over twenty five years strategic consultancy and management experience with the international broadcasting, consumer electronics, media, mobile, subscription television, satellite and telecommunications industries operating at very senior level. An acknowledged communicator, he has spoken at many international conferences on media, television and telecommunications, and on television and radio. He has published reports on several areas of digital television, most recently on mobile television in 2005 in conjunction with Screen Digest Ltd. Dermot has been actively involved in HDTV for around 18 years spanning standards, services, economics and public policy.

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Michael Ortlepp

Executive Producer IPTV / Videoload, IPTV Products & Innovation Deutsche Telekom AG



Michael Ortlepp is Executive Producer for the IPTV product of Deutsche Telekom. In this function he is

responsible for the content side of the product, the relationship to the broadcaster that partner with Deutsche Telekom and the Video on Demand offering called Videoload.

Before joining Deutsche Telekom in early 2002 Michael was responsible for the content part of RTL Television based in Cologne. Here he lead the production group for the websites of all stations such as RTL.DE, RTL2.DE and other leading german content sites. From 1995 to 98 Michael Ortlepp worked as Senior producer for the Microsoft Network in Munich, being responsible for local content and the adaption of international content. From 1988 to 95 Michael worked as a computer book and Multimedia CD-ROM author

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for SYBEX publishing in Düsseldorf. During this time Michael published 65 titles in 9 languages.

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Michael Ortlepp
Executive Producer IPTV / Videoload
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Prof. Dr. Dres. h. c. Arnold Picot

Institute for Information, Organization and Management, Munich School of Management, Ludwig-Maximilians-Universität München



Prof. Dr. Dres. h. c. Arnold Picot holds the chair of the Institute for Information, Organization and Management

at the Munich School of Management at the Ludwig-Maximilians-Universität München, Germany. With more than 400 publications and over 30 years of scientific experience in research and teaching, his expertise includes organization,

information and communication as well as related markets and technologic developments. In addition he serves as board member in various public, private and social functions.

Gerold Reichle

Director-General of Department Technology Policy at the Federal Ministry of Economics and Technology, Germany



Born in Wangen/Allgäu on 5 December 1957, Married, 3 children

Following the Abitur (university-entrance qualification) at the Rupert-Ness-Gymnasium in Wangen/Allgäu, study of electrical engineering at Munich Technical University Graduated in 1984 as *Diplom-Ingenieur*

- 1985
Practical training at Deutsche Bundespost in Munich; concluded with Final State Examination
- 1987
Various tasks at Deutsche Bundespost (Cologne district); e.g. project group director for the introduction of new services
- 1991
Move to Federal Ministry for Posts and Telecommunications: deputy head of division responsible for European telecommunications policy

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- 1993
Deputy head of division in minister's office
- 1995
Head of office and personal assistant to the Federal Minister for Posts and Telecommunications
- 1998
Head of division responsible for German and European postal policy in the Federal Ministry of Economics
- 2003
Deputy director-general for telecommunications and posts (law, frequencies, standardisation, telecoms security)
- 2004
Director-General responsible for communications and postal policy in the Federal Ministry of Economics and Technology
- 2008
Director-General responsible for technology policy in the Federal Ministry of Economics and Technology
- 1996–1997
Online-designer, Internet content-provider
- 1997–2001
Deputy head of section BNetzA (German Telco Regulator)
- 2002–2003
Administrator, European Commission, Access and Interoperability
- Since 2003
Administrator, European Commission, Digital Broadcasting

Dr. Ralf Schäfer

Head of the Image Processing Department, Fraunhofer Institute for Telecommunications



Ralf Schäfer received his Dipl.-Ing. and Dr.-Ing. degrees both in electrical engineering from the Technical

University of Berlin in 1977 and 1984 respectively. In October 1977 he joined the Heinrich-Hertz-Institut (HHI) in Berlin. Since 1989 he is head of the Image Processing Department. In the department he is responsible for about 50 researchers and technicians, about 30 students and currently 25 R&D projects.

He coordinated several national research initiatives (e.g. HDTV, MINT) and was member of the Technical Module of the European DVB-project (TM-DVB), where he was chairing the Task Force on Digital Terrestrial Television-System Aspects,

Dr. Andreas Röver

Administrator, European Commission, Digital Broadcasting



■ 1990–1995
Assistant professor, Technical University Munich

■ 1996
Thesis on Network Externalities, Doctor of Economics, Technical University Munich

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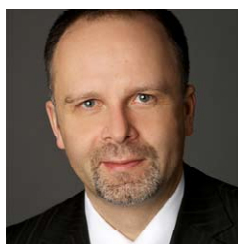
which specified the DVB-T standard. Currently he is coordinating the Core Technology Cluster of the THESEUS project, which is a German initiative on semantic technologies.

Ralf Schäfer is member of the German *Society for Information Technology* (ITG), where he is chairman of the experts group *Digital Coding* (FG 3.2). Furthermore he is member of the German *Society for Television and Motion Picture Technology* (FKTG), where he belongs to the URTEL Award Committee.

In 1986 he received the paper award of the ITG and in 2000 the Richard Theile Medal of the FKTG.

Michael Schidlack

Head of Department for Consumer Electronics & Digital Home, BITKOM e. V.



After graduating in Economics, Michael Schidlack, born in 1960, was Managing Director of a company in the

CE and Information and Communication Technology business from 1985 until 2002.

He held positions on the Board of Directors at the Bundesverband für Technik (Cologne) and the Deutsche Videoinstitut (Berlin / Hamburg). He was also a member of the Assembly of Delegates at the Chamber of Commerce and Industry in Bielefeld

and acted as advisory body for the computer cooperation Comteam (Lilienthal) and T-Mobile. In addition to this he was nominated for the European Advisory Board by Nokia and by Expert Cooperative committees.

From 2002 until 2006 he was employed as Senior Consultant / Project Leader at BBE Retail-Experts GmbH in Cologne/Hamburg und consulted market leading companies from Trade and Industry, primarily in advising IT and CE specialists. Furthermore he took on projects for Ministries and Associations and in this advisory capacity numerous surveys and articles of his were published about the CE Market. Since 01.01.2007 he is employed as Head of Department for Consumer Electronics and Digital Home at BITKOM.

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Michael Schidlack

Head of Department Consumer Electronics & Digital Home, BITKOM – Bundesverband Informationswirtschaft, Telekommunikation und neue Medien e. V.

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Franz Simais

CEO Humax Digital GmbH



Since being appointed CEO of HUMAX-Digital GmbH in 2001, Franz Simais (54) has shaped the development

of HUMAX in Central Europe towards one of the most successful CE brands, especially in the fields of Digital Television, HDTV and Home Cinema. Within his eight years HUMAX has achieved remarkable technological milestones, wide market penetration and a highly respected reputation within the consumer market, the media and CE industry. After graduating from trade school, specializing in wholesale and external trade, Franz Simais started his career at Zenith Data Systems as Director Sales and Marketing in 1985. In the years 1987 until 1989 he was responsible for Sales within the PC Division at Olivetti Germany, before changing over to Amstrad GmbH. With a two year interruption at Minerva GmbH, Grundig Management in 1995, Franz Simais worked as CEO and Sales Director before leaving Amstrad and starting at HUMAX-Digital GmbH with more than fifteen years of experience.

Herbert Tillmann

Technical Director of Bayerischer Rundfunk



■ Joined the Bayerischer Rundfunk, a German public broadcaster on March 1973

- Technical Director of the Bayerischer Rundfunk since January 1, 1995
- Chairman of the Production and Technical Commission (PTKO) at the ARD public broadcasting company since January 2005
- Initiated the Free TV Project, is a co-founder of the Free Universe Network (FUN) and represents ARD in the DVB
- Member of Strategy-group of ARD Broadcasting Company
- Supervisory board chairman of Bavarian Digital Radio (BDR) and representative of the Bavarian Broadcasting Corporation in the company general meeting of the Bavarian Media Technics GmbH (BMT).
- Initiator and organization of Bavaria Digital Radio (BDR) for DAB.
- Member of the Technical Committee and of Technical Assembly in the EBU
- Member of management of *Münchner Kreis*
- Herbert Tillmann was awarded the Cross of Order of Merit of the Federal Republic of Germany on 21 July 2003

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Dr. Mario Tobias

Member of the Executive Board, German Association for Information Technology, Telecommunications and New Media (BITKOM)



Mario Tobias, born 1971, started working for BITKOM in 2000. After three years in the public sector, he joined

the German ICT-association as head of department environmental policy & sustainability. In 2005 he was appointed as member of the Executive Board. Since then he is responsible for the business unit *Technologies & Services*, consisting of eight departments, among them Consumer Electronics, IT-Services, Software, Infrastructure and IT-Security.

He is member in various committees and boards of ministries, trade associations and science.

Tobias holds two diploma in Biology and economics and business sciences as well as two doctorates (PhDs) from the Technical University of Braunschweig (Dr. rer. nat. in 2000) and the Freie Universität Berlin (Dr. rer. pol. in 2007).

He published in several German and international journals and is visiting lecturer with Freie Universität Berlin and the Institute for Logistics at the University of St. Gallen (Switzerland).

Lars Thomsen

CEO of Future Matters



Lars Thomsen (40) is one of the most respected Futurists in Europe. With his Munich and Zurich based

company *future matters* he consults some of the most important European companies and institutions in strategic future issues.

In times of highly paced change in technology, communication and management, Lars Thomsen helps top business leaders develop individual corporate strategies, methods and tools such as think tanks, innovation labs or trend radar systems.

Thomsen regularly writes for national and international publications on future issues and is an eloquent and charismatic speaker at conferences all over the world.

He lectures at Bavarian Academy for Marketing and Advertising (BAW) and is a member of the *World Future Society* in Washington, D.C.

W

Thomas Wrede

Vice President, Product Management Media at SES ASTRA



Thomas Wrede is the Vice President, Product Management Media at SES ASTRA in Betzdorf / Luxembourg, where he and his team

are responsible for defining and managing the satellite operator's products and services portfolio for customers from the media industry.

Thomas Wrede joined SES ASTRA in 1992 as a Senior Systems Engineer. He has been deeply involved in the development of digital satellite television, in-home signal distribution concepts, digital satellite radio, satellite return channel technology, Internet via satellite, High Definition Television and most recently Mobile TV via satellite.

Prior to working for SES ASTRA Thomas was leading an engineering team at the cable amplifier and satellite reception equipment manufacturer FTE in Germany. He started his professional career as an RF Design Engineer at the German antenna manufacturer Zehnder in 1985.

Attendance Prices



Standard Rate 695 € *

Standard Rate *colleague* 395 € *
For any additional person employed by the same company

Members 395 € *
For members of the BITKOM e.V. or Intellect only

Members *colleague* 195 € *
For any additional person employed by the same member-company

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* all prices exclude 19% VAT.
Included in the event price are the three coffee breaks,
two lunches, also the dinner on the evening of the first day.

Hotel Arrangements

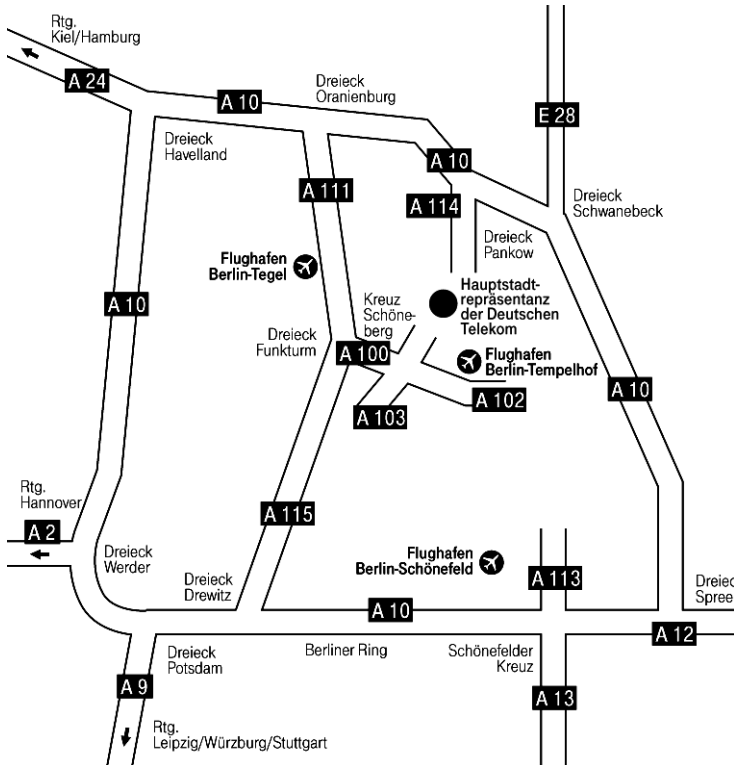
We have made special arrangements for 14.10.2008 with the following hotels which may be booked at special rates when mentioning BITKOM.

Please take into consideration that due to many other events taking place in Berlin it will be advisable to make a booking as soon as possible.

		RESERVATIONS		
		rooms	until	
Winter's Hotel Berlin Mitte**** SGL 109,00 € / DBL 129,00 € Hedemannstraße 11 / 12 10969 Berlin Tel.: +49.30.3198618-0		20	16.09.	
		visit website		
Westin Grand Berlin**** SGL 160,00 € / DBL 190,00 € Friedrichstraße 158–164, 10117 Berlin Tel.: +49.30.2027.3474		10	07.09.	
		visit website		
NH Hotel Berlin-Mitte**** SGL 198,00 € / DBL 217,00 € Leipziger Straße 106–111 10117 Berlin Tel.: +49.30.20376-0		20 20	19.08 16.09.	
		visit website		
Hotel De Rome***** SGL 290,00 € Behrenstraße 37 10117 Berlin Tel.: +49.30.460609-0		10	31.08.	
		visit website		

Directions

to Deutsche Telekom's Berlin Representative Office



■ Arrival by car

There are only pay car parks near the Berlin Representative office.

■ Arrival by subway

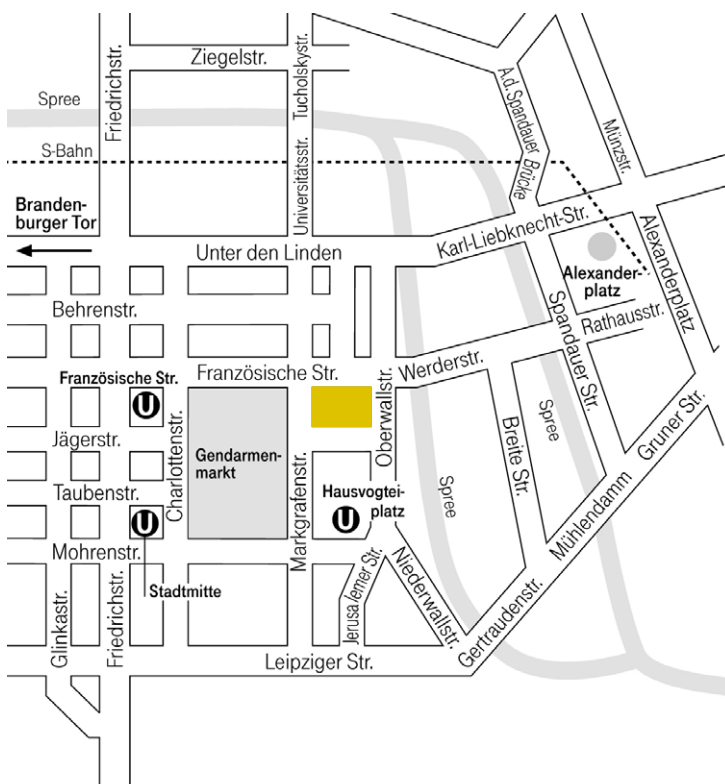
Travelling on subway line no. 2, get off at Hausvogteiplatz. Walk up the Oberwallstraße in the direction of Unter den Linden.

The Berlin Representative Office is on the second corner on the left.

Or, travelling on subway line no. 6, get off at Französische Straße. Walk up the Französische Straße in the direction of Alexanderplatz. Our Berlin Representative office is about 300 m away on this street.

■ Arrival by Plane

From Berlin Tegel airport take the TXL bus as far as the Staatsoper (Unter den Linden) stop. From there, Französische Straße is only five minutes away by foot.



**Berlin Representative Office
of Deutsche Telekom AG**
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Mediapartner

