XX Festival Internazionale di Cinema e Televisione
Rome,Italy, 20 – 23 October 2006

Atelier II – Nuove modalitá di distribuzione nell'era digitale

Mapping the Digital Future

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The views expressed in this presentation are those of the authors and do not necessarily reflect the opinions of the ITU or its Membership.

Building the Information Society

A Global Challenge in the New Millennium

ITU-T

Telecommunication and standardization – network and service aspect

ITU-D

Assisting implementation and operation of telecommunications in developing countries

ITU-R

*Radiocommunication and standardization – global spectrum management*

ITU as a leading agency of WSIS

The World Summit on Information Society talked about a society in which "…everyone can create, access, utilize and share information and knowledge…"

Evolving scenario...
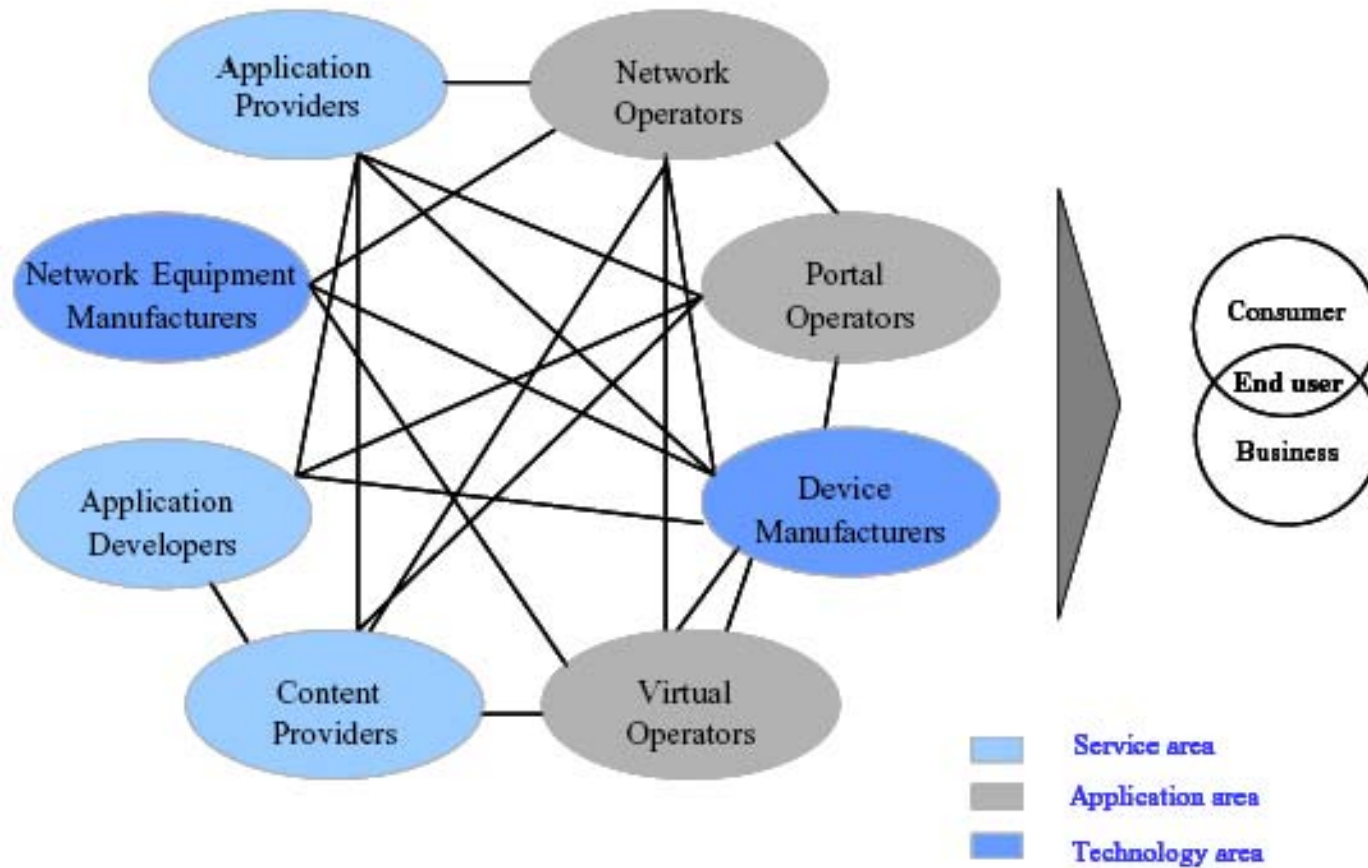
I.   from static to dynamic

II.   from divergence to convergence

III. from big to small

IV.   from local to global

V.   from vertical to horizontal

VI.   from sometimes-on to always-on

VII. from fixed to mobile

VIII. from wired to wireless
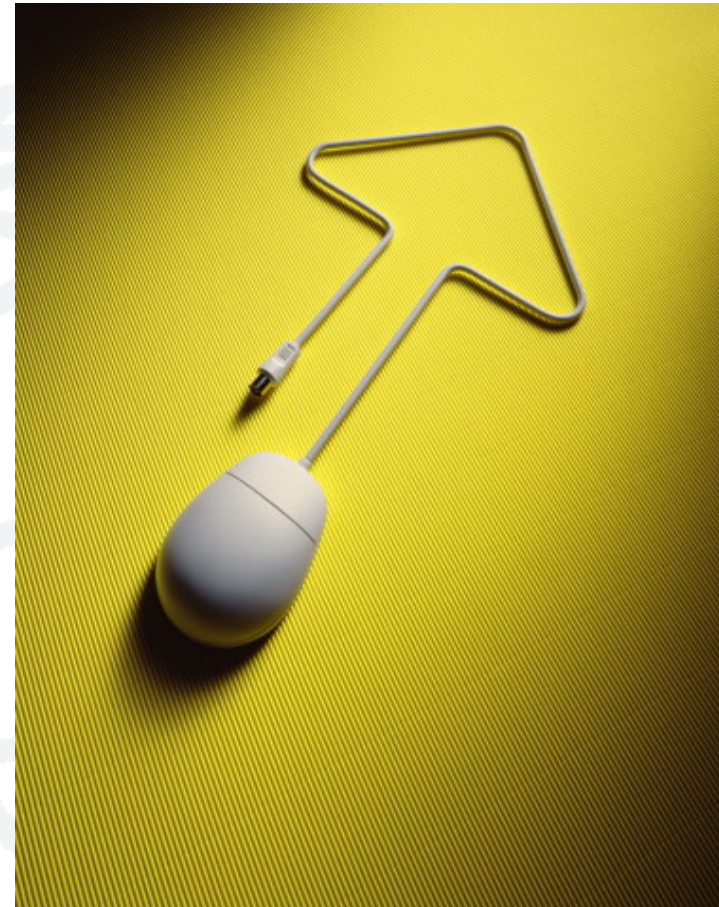
Moving ahead...

New players- new roles, old players-new roles

Source: EITO

What drives multi-stakeholders?

I.   User requirements
   - ✓   *on-the-go access to information*
   - ✓   *communication & file sharing*
   - ✓   *thirst for multimedia*

II.   Market trends
   - ✓   the mobile revolution
   - ✓   rapid take-up of internet and broadband
   - ✓   increased use of portable and palmtop computers, and multimedia devices
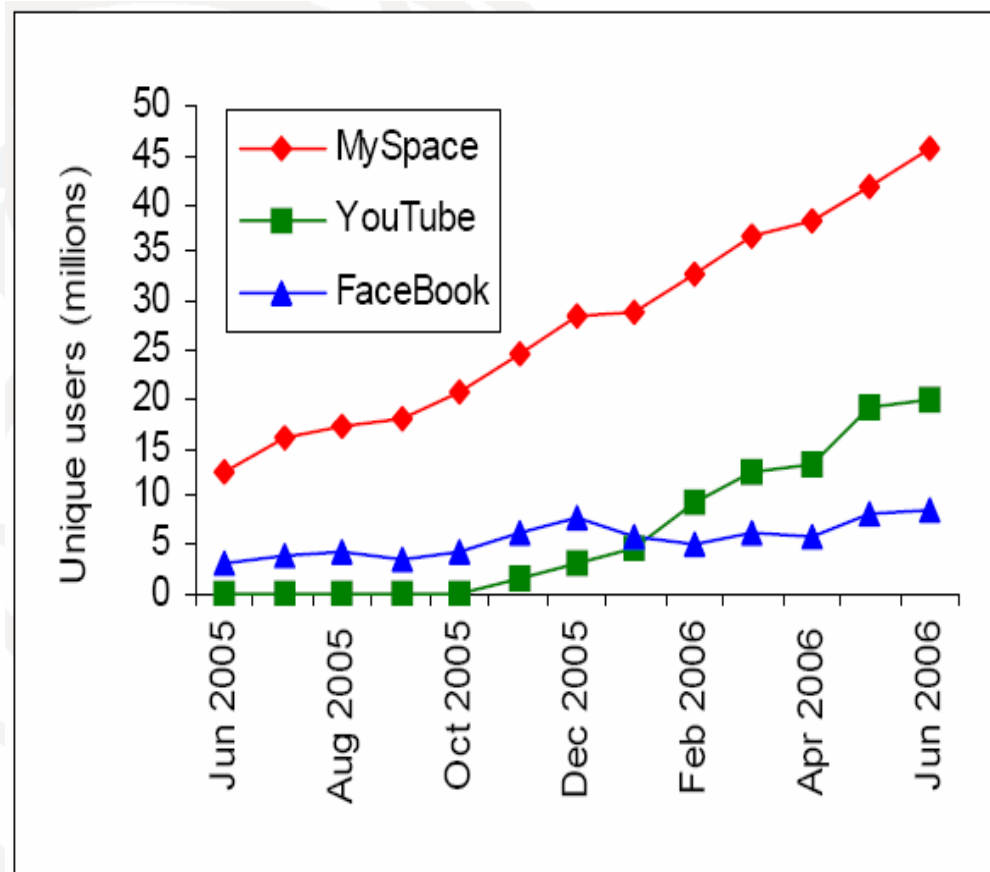
III.   Technological Innovation
   - ✓   high speed, cost effective mobile systems
   - ✓   integrated competitive platforms
   - ✓   small, powerful, application-rich user devices
      - ▪   *May mean a re-visiting of content …*
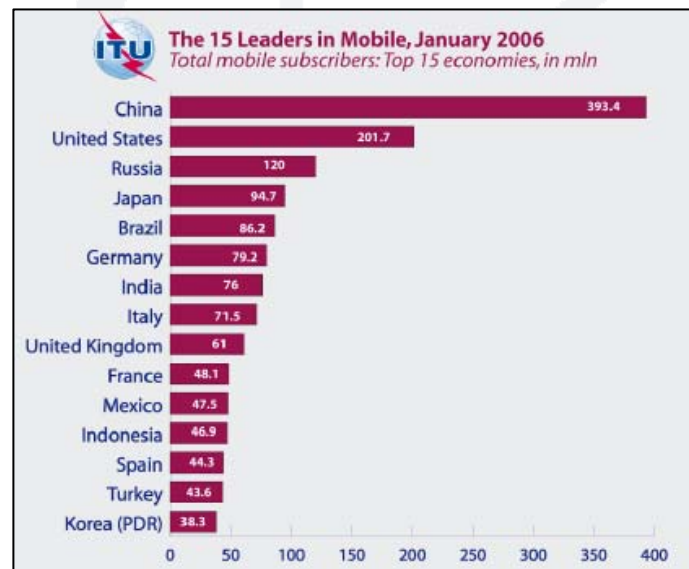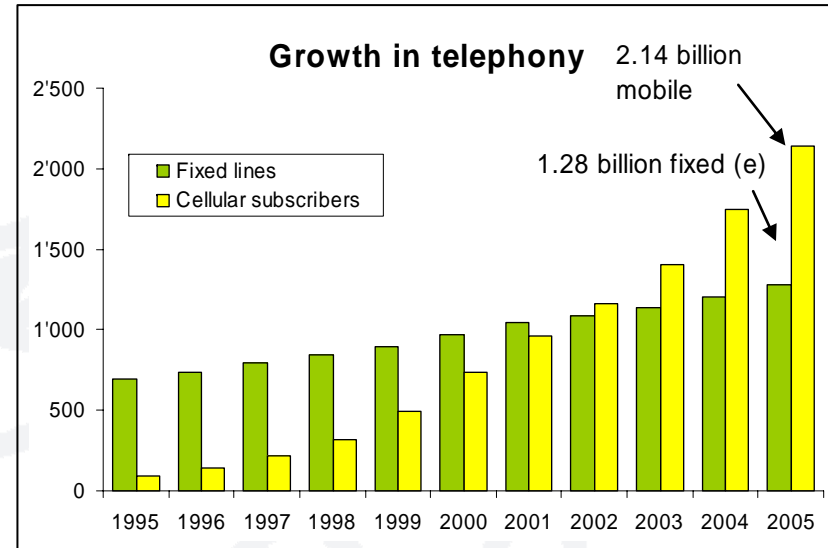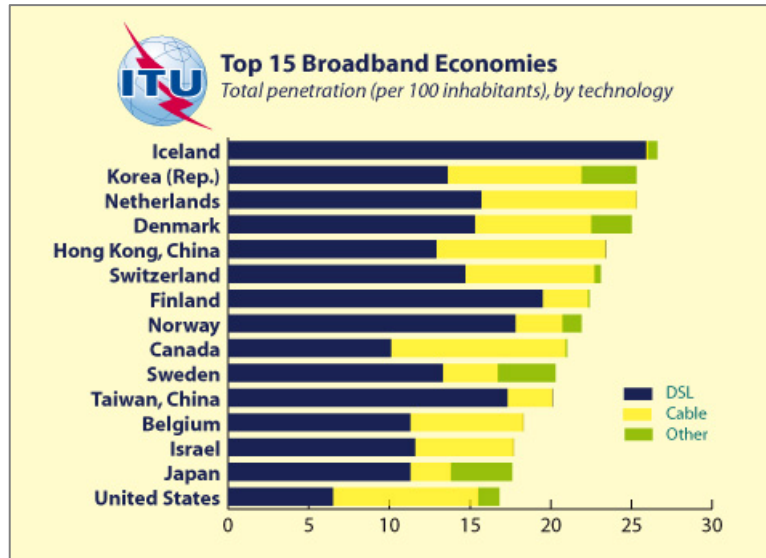
Catering for changing user...

Today's user is evolving!

I.   from user to developer

II.   from observer to creator

III.   from follower to leader

IV.   from consumer to producer

V.   from audience to player

VI.   from reader to storyteller

VII.   from passive listener to active speaker

VIII.   from subject to participant

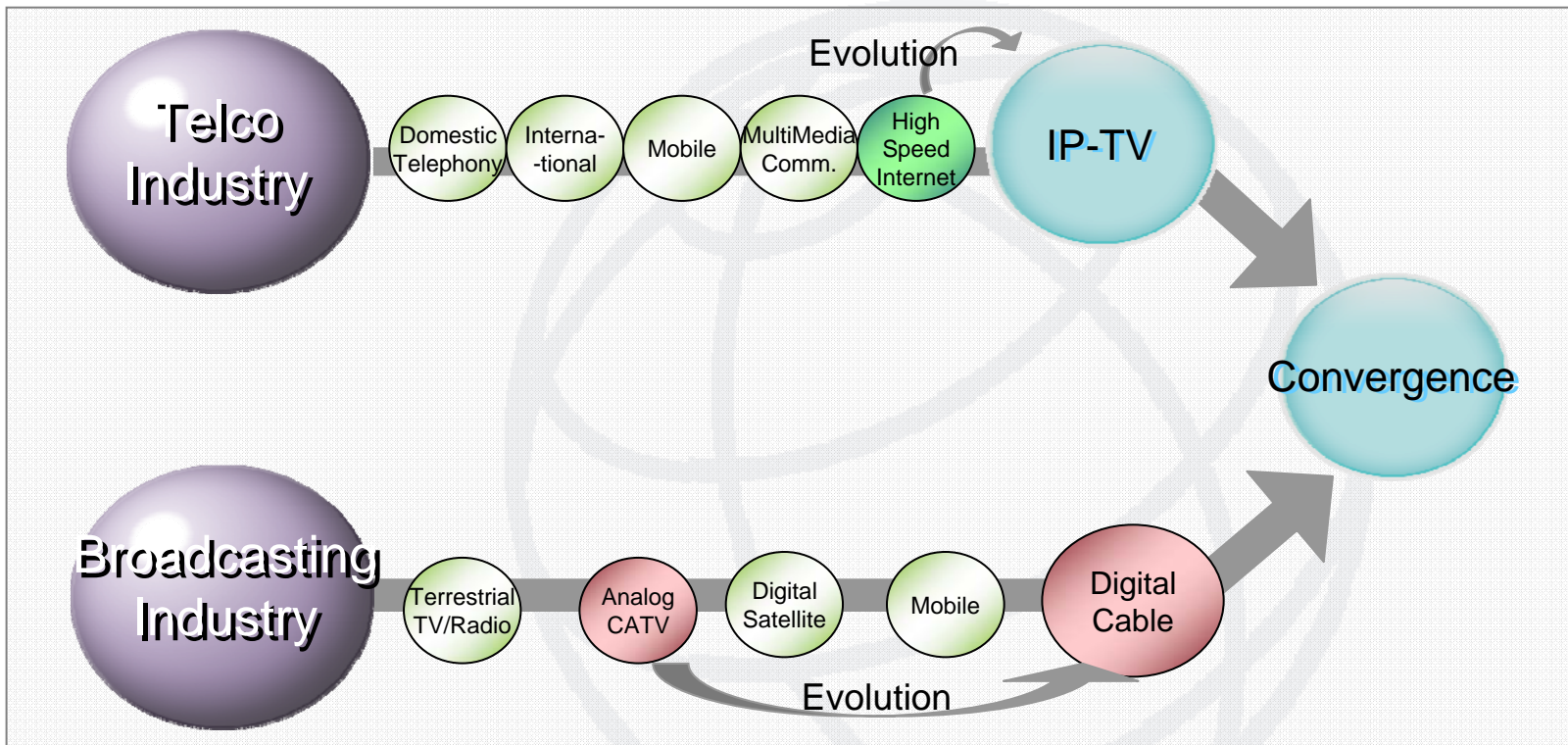Source: ITU digital.life Report 2006

Leads to a changing market landscape…

Top 15 Broadband Economies
Total penetration (per 100 inhabitants), by technology

Iceland
Korea (Rep.)
Netherlands
Denmark
Hong Kong, China
Switzerland
Finland
Norway
Canada
Sweden
Taiwan, China
Belgium
Israel
Japan
United States

DSL
Cable
Other

Growth in telephony 2.14 billion mobile

1.28 billion fixed (e)

Fixed lines
Cellular subscribers

1995 1996 1997 1998 1999 2000 2001 2002 2003 2004 2005

The 15 Leaders in Mobile, January 2006
Total mobile subscribers: Top 15 economies, in mln

Country	Subscribers
China	393.4
United States	201.7
Russia	120
Japan	94.7
Brazil	86.2
Germany	79.2
India	76
Italy	71.5
United Kingdom	61
France	48.1
Mexico	47.5
Indonesia	46.9
Spain	44.3
Turkey	43.6
Korea (PDR)	38.3

Source: ITU, 2005-2006

Innovation & Content: the "Big Deal"

Content over various platforms

Through technological and industry convergence the same content can increasingly be delivered over different technology platforms and services.
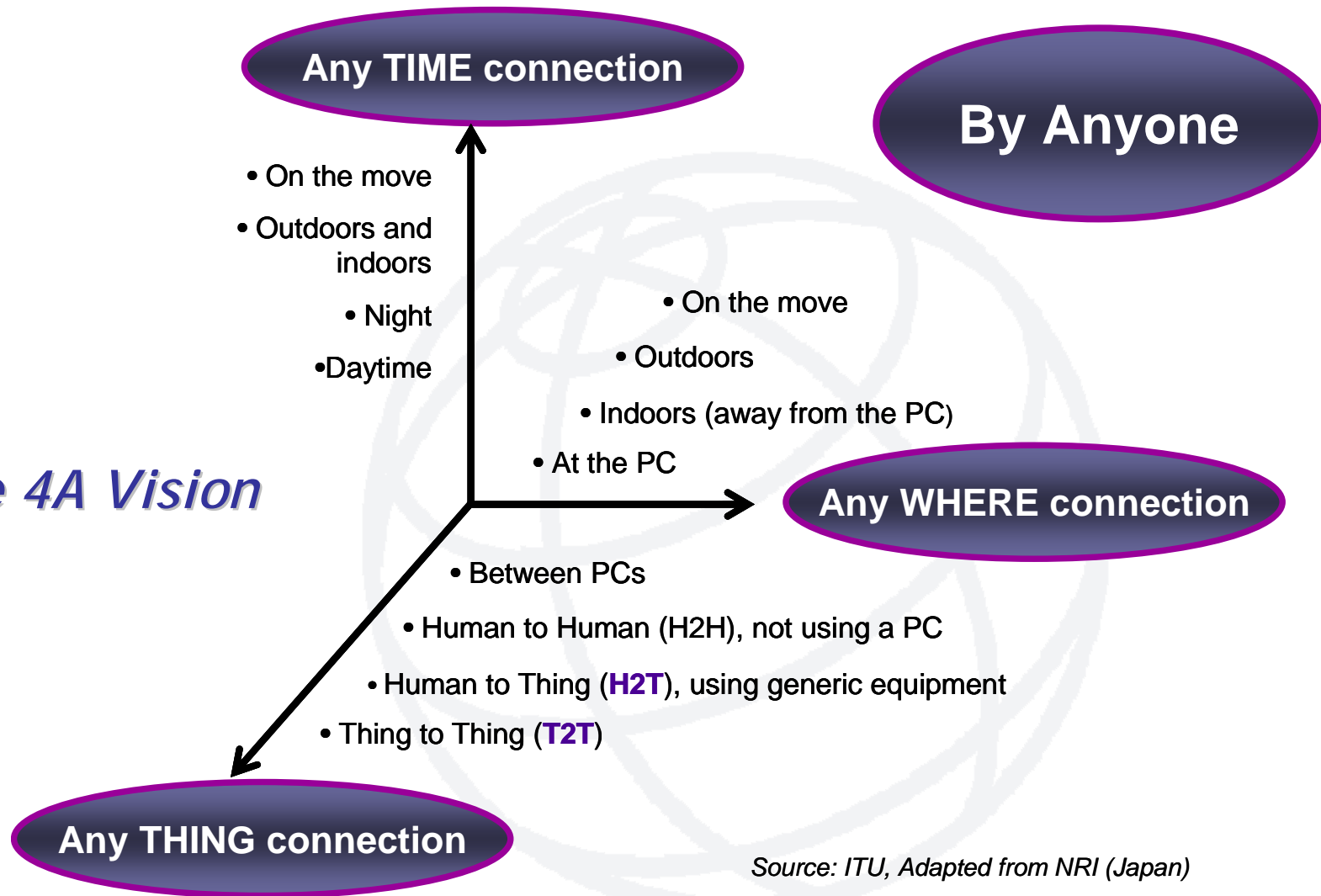

Looking for technologically neutral policies ?

Convergence is the key...
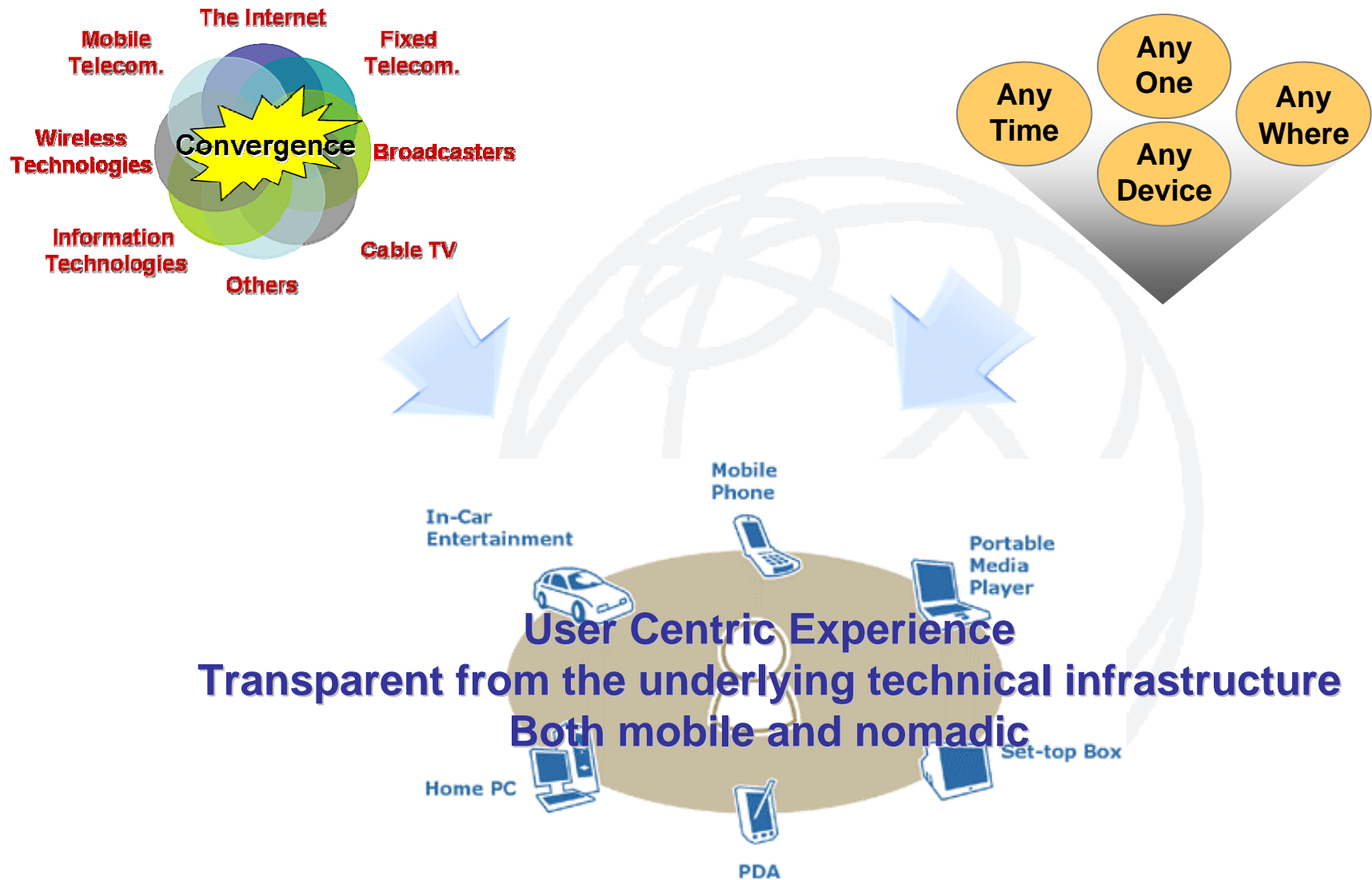
Any TIME connection

By Anyone

• On the move

• Outdoors and indoors

• Night

•Daytime

• On the move

• Outdoors

• Indoors (away from the PC)

• At the PC

The 4A Vision

Any WHERE connection

• Between PCs

• Human to Human (H2H), not using a PC

• Human to Thing (**H2T**), using generic equipment

• Thing to Thing (**T2T**)

Any THING connection

Source: ITU, Adapted from NRI (Japan)

The way ahead

The Internet
Mobile Telecom.
Fixed Telecom.
Wireless Technologies
Convergence
Broadcasters
Information Technologies
Cable TV
Others

Any Time
Any One
Any Where
Any Device

In-Car Entertainment
Mobile Phone
Portable Media Player
Home PC
Set-top Box
PDA

User Centric Experience
Transparent from the underlying technical infrastructure
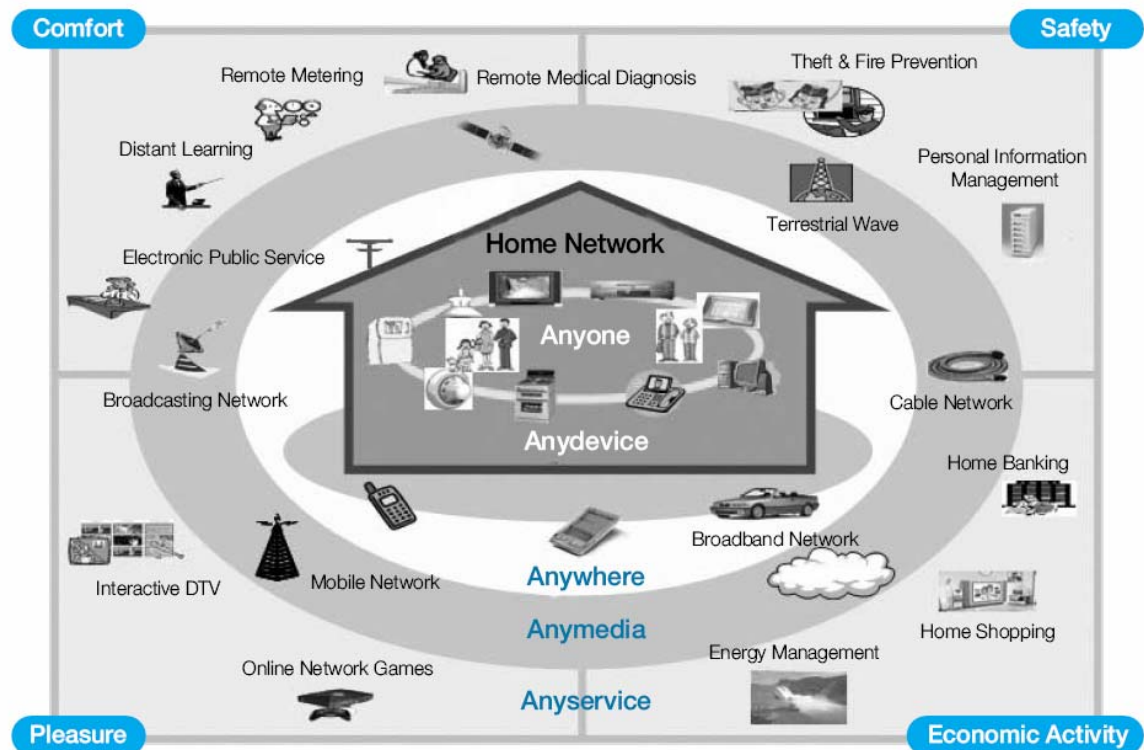**Both mobile and nomadic**

Looking beyond...

Building Tomorrow's Networks

I. A fully integrated approach

II. Ambient awareness Communication

III. Context awareness Communication

IV. The true 4A vision

V. User centric approach

Source: MIC, Master Plan of IT839 Strategy 8 Services, June 2004
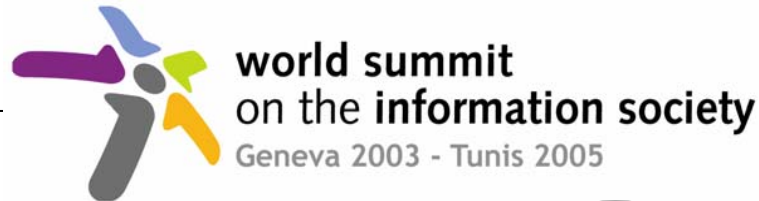
STN Programme

The programme will encompass the creation of telecommunication infrastructures by contributing to building ICT networks and developing services that are available anywhere and anytime, to anyone and on any device.

For this vision to become a reality, network technologies, content, and user accessibility must be developed in an integrated fashion.

Shaping Tomorrow's Networks

http://www.itu.int/STN

Share your expertise with us ...

....becoming a STN Partner !!

..Winners...bystanders...losers

While the most probable scenario is a blend of convergence winners, bystanders and losers, overall the momentum should be positive.

The unrelenting progress of technology, connectivity and digitization are expected to continue generating new convergence opportunities.

Convergence looks set to remain both a headline and a key influencer for many years to come !

Useful links

I. ITU Strategy and Policy Unit
    - ✓ www.itu.int/spu

II. Shaping Tomorrow's Networks Programme
    - ✓ www.itu.int/stn

III. Workshop on "Market Mechanisms for Spectrum Management"
    - ✓ www.itu.int/spectrum

IV. Workshop on "Tomorrow's Networks Today"
    - ✓ www.itu.int/tnt

THANK YOU !

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Food for thought

The challenges of more platforms

I.   how do you turn audience fragmentation into a viable economic model in a converging environment?

II.   how to translate changes driven by technology into something meaningful from the chaos?

III.   how do you reach users?

IV.   how do you engage customers and elongate their stay once you reach them?