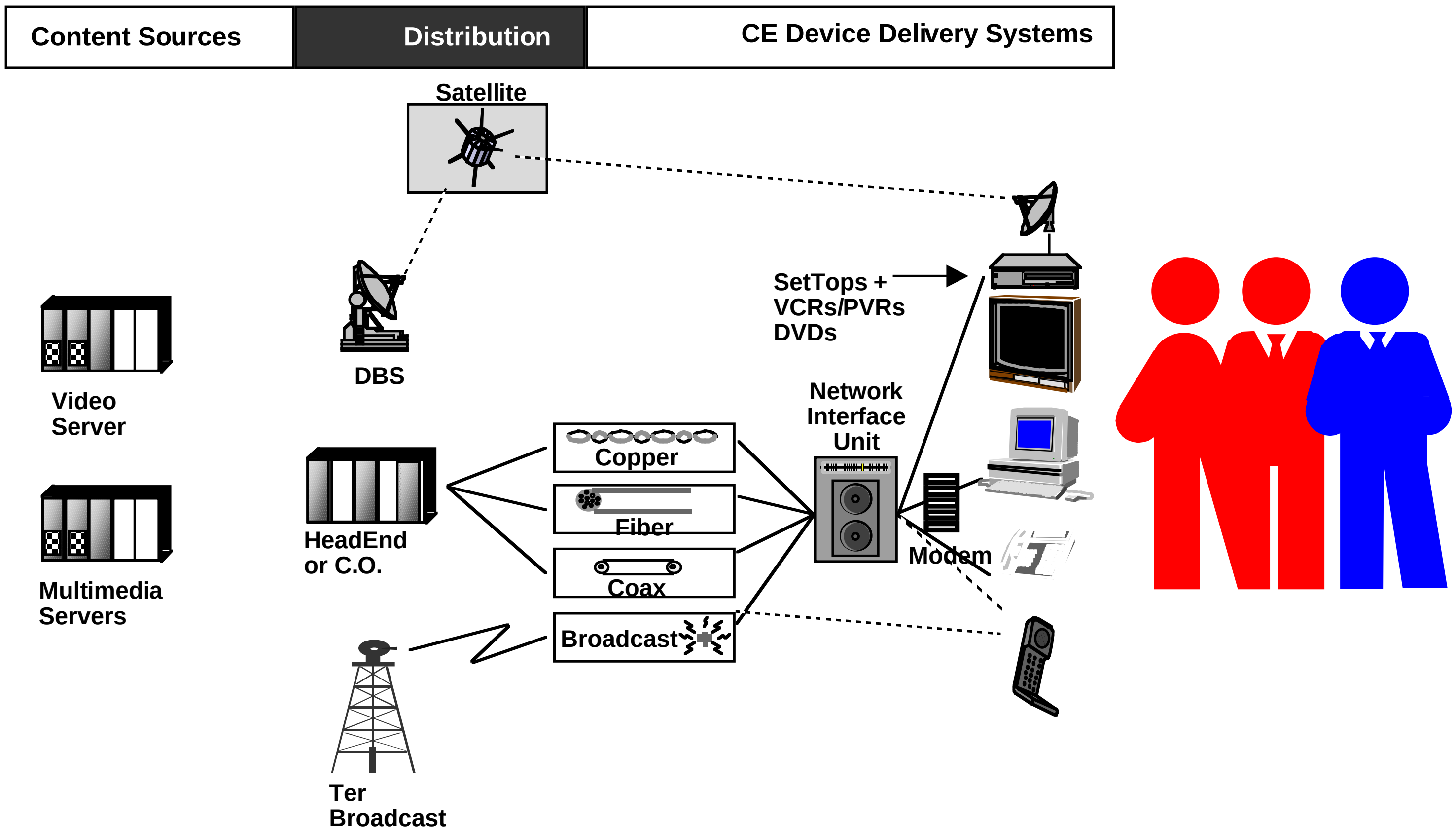
The Future of TV Broadcasting:

Where Have All the Eyeballs Gone?



Informal Discussion Panel Sessions

Wednesday June 20- 8:00pm-10pm

LAX Marriott Suite C

http://www.comminfotech.com

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Agenda & Ground Rules

This is an interactive session, it will be more valuable if you participate

- Agenda
  - Moderator’s introduction
  - Short openning statement by each panel member
  - Q&A between moderator, panel members, and audience
  - Closing statements by panel members and wrapup
- Ground rules
  - Please use the microphone or speak loud enough
  - The first time you ask a question introduce yourself by name and organization
  - No topic is out of bounds but moderator may exercize right to move discussion to insure balanced coverage of topics

Our Panel

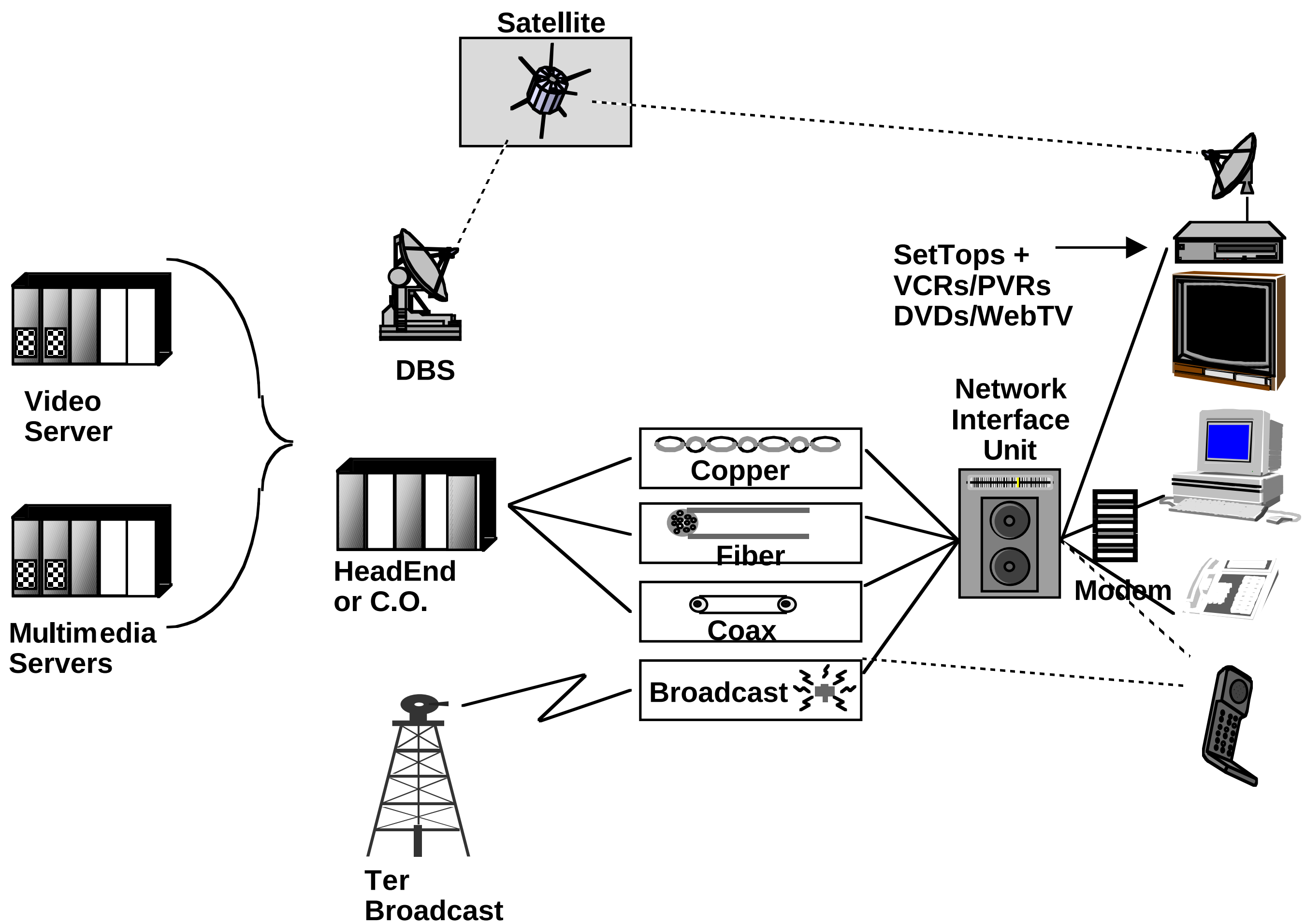
Moderator:

Stuart Lipoff, VP Communications & Info Technology
ADL Technology

Panel Members	Perspectives
Richard Doherty, Director Envisioning Group	Industry Analyst & Consultant
Jeff Maul, Director Satellite Practice ADL Technology	DBS Industry
Karl Meyer, Manager Media Partnerships TiVo	PVR
Mark Mullen, Director Planning Microsoft Ultimate TV	Next Gen TV
Michael Isnardi Sarnoff Corporation	ATSC Technology

Playing Field

Content Sources	Distribution	CE Device Delivery Systems



The stakeholders include

- Advertisers & Agencies
- Content Developers
- Broadcasters
- Cable MSOs
- DBS Providers
- CE Manufacturers
  - Conventional Video Delivery
  - Next Gen Delivery Systems
  - SetTop Accessories
- Competitors for leasure time
  - Internet related
  - Videogames
  - Other?

STAKEHOLDERS

Who are they?

What do they care about?

How will they execute their role?

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Key Issues

Stakeholders will differ as which concerns are relevant or have priority

- Dilution of advertising $$$
- Competition between service providers
- Evolving and unstable standards
- Who will control the consumer *look and feel & overall experience*
- Who will *own* the revenue stream from the consumer
- New (higher margin/higher growth) CE device opportunities
- New business models that change the mix of
  - Advertising support
  - Pay per **X**
- Which technologies will give financial leverage, e.g:
  - Security and rights management
  - Advanced displays
  - Advanced DSP
  - Advanced assembly/manufacturing
- Changes in key success factors
- Chicken vs. Egg first movers
  - Content first?
  - Low cost devices first?
  - Wide scale consumer adoption?

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