

# **DTT : DECODER, SWITCH- OFF PROCESS, CNID**

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# Introduction

1.

# Introduction

- This presentations covers the following aspects of the complex migration process to DTT:
  - **Receiving equipment**
  - **Switch-Off planning**
  - **CNID**

# **DTT Decoder** (data are obtained from external sources (JFK )

**2.**

# DTT Decoder

- **TYPE OF RECEIVING EQUIPMENT:**
  - **ZAPPER (standalone)**
  - **INTERACTIVE DECODER (standalone)**
  - **IDTV (Integrated Digital TV)**

# DTT Decoder

- **ZAPPER FUNCTIONALITIES:**

- DTT Tuner
- Common Interface
- Resident Navigator

# DTT Decoder

- **INTERACTIVE DECODER  
FUNCTIONALITIES:**

- DTT Tuner
- Common interface
- MHP for interactivity
- Return Channel
- CAS embedded
- Smart Card I/F



# DTT Decoder

- **INTEGRATED DIGITAL TV**
  - Integrated in a digital TV set which includes at least a DTT tuner
  - Usually iDTV make part of top TV sets (e.g. wide screens) characterized by high prices

# DTT Decoder

- PRICE RANGE OF RECEIVING EQUIPMENT:

- ZAPPER

- DECODER

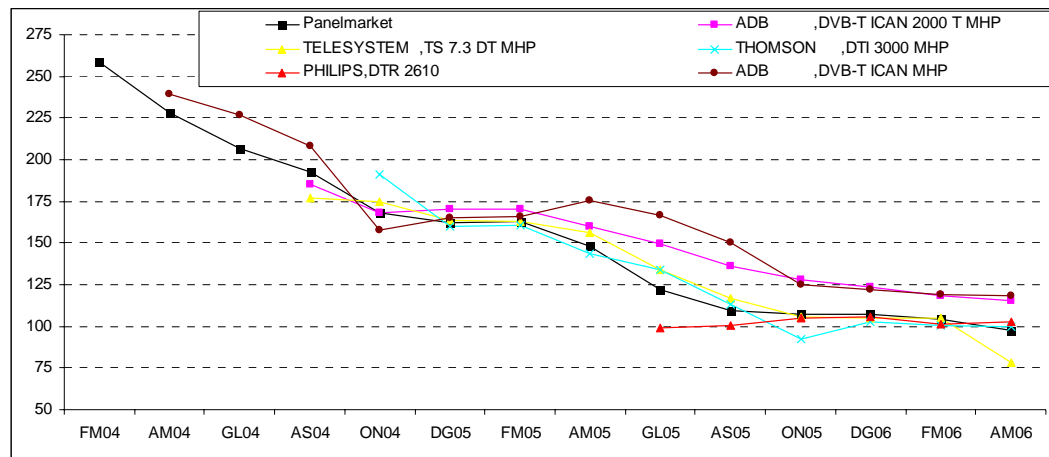
- IRD

# DTT Decoder

GfK Marketing Services Italia

## GfK Marketing Services Italia - Decoder Digitale Terrestre PREZZO MEDIO DEI 5 MODELLI PIU' VENDUTI DAL 2004 AD OGGI \*

6



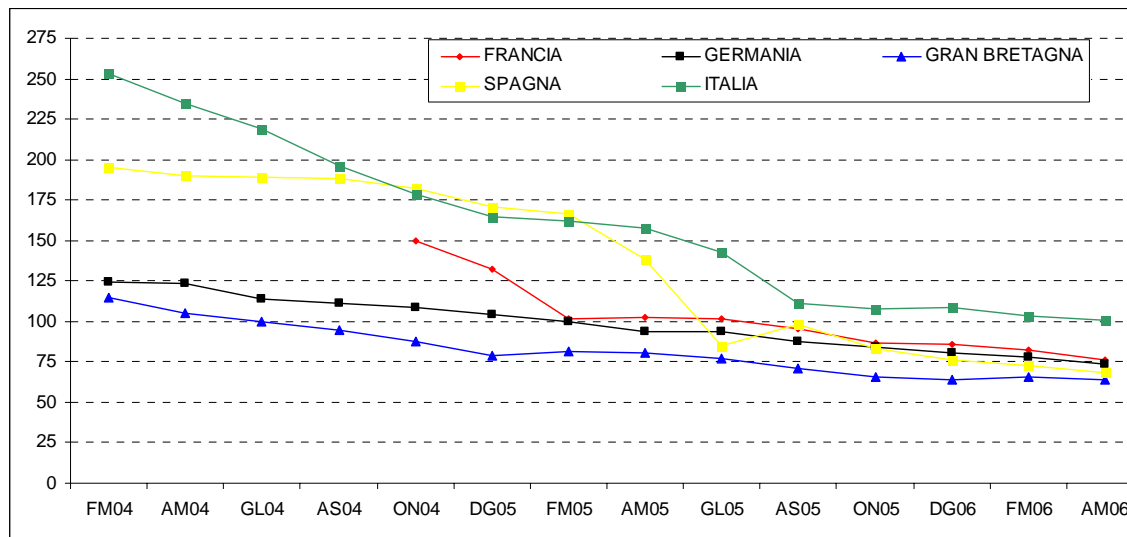
\*= Il prezzo medio è il prezzo effettivo di vendita, al netto del contributo statale.

# DTT Decoder

GfK Marketing Services Italia

## GfK Marketing Services Italia - Decoder Digitale Terrestre PREZZO MEDIO DEI DECODER NEI PRINCIPALI PAESI EUROPEI \*

8



\* = Il prezzo medio è il prezzo effettivo di vendita, al netto dei contributi statali.

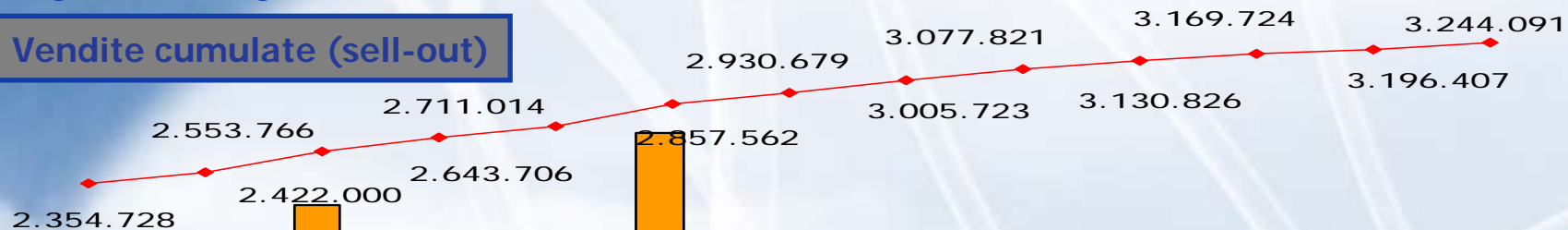


GfK Marketing Services Italia per DGTVi

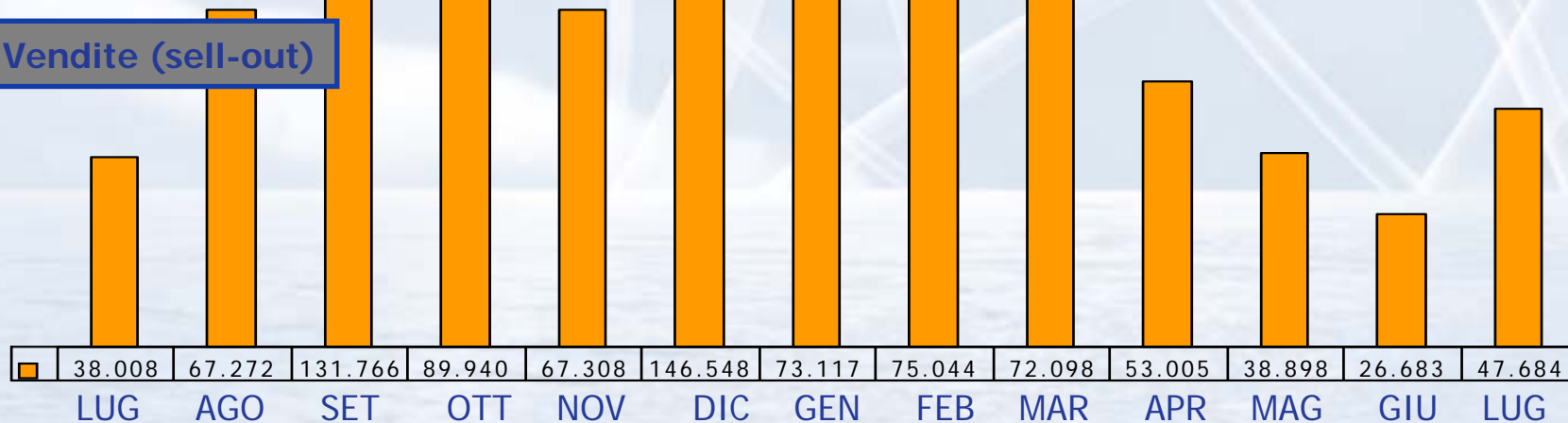
## Decoder Digitale Terrestre - GfK Panelmarket

Luglio 06 – Luglio 2007

Vendite cumulate (sell-out)



Vendite (sell-out)



FONTE: Panel GfK Marketing Services Italia.

Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi

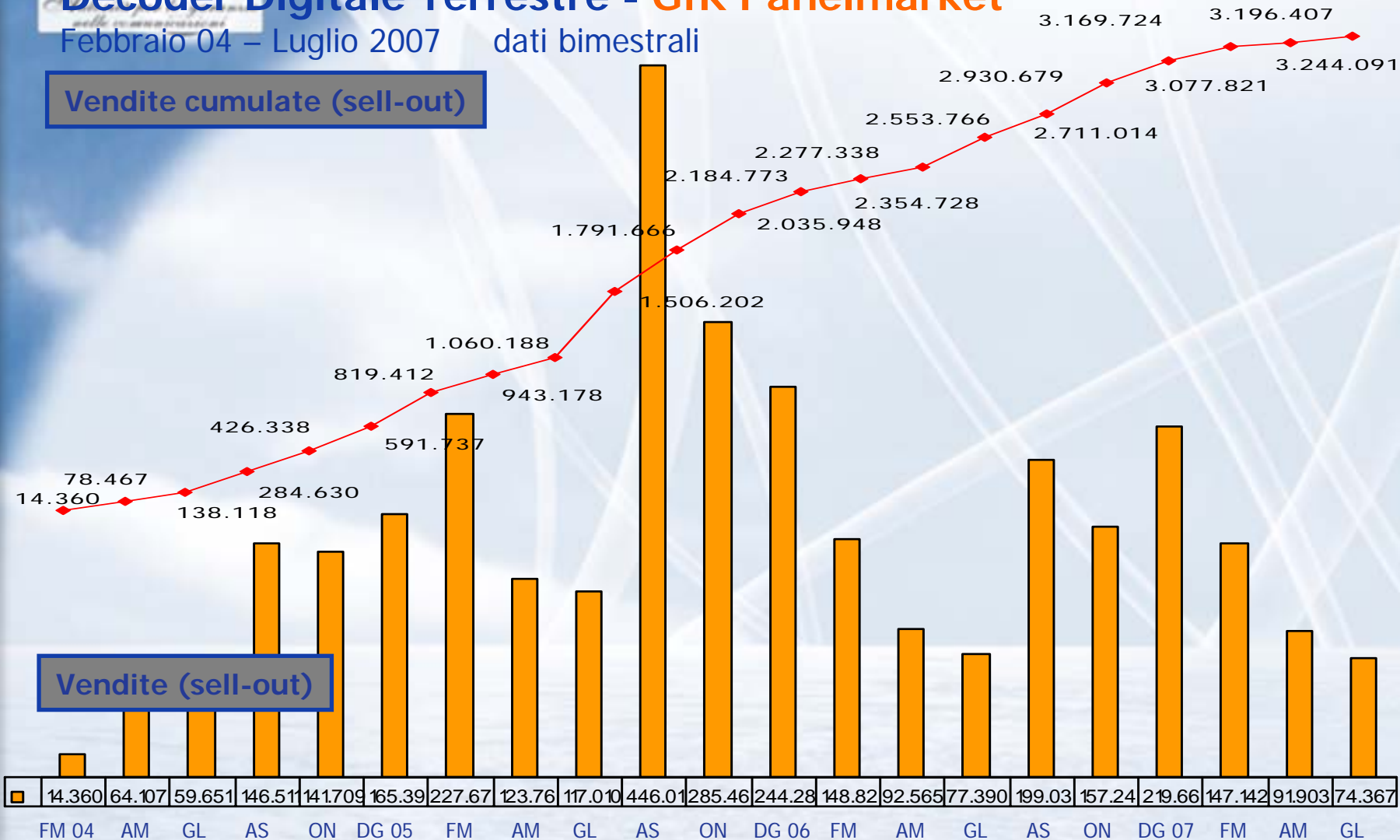


# GfK Marketing Services Italia per DGTVi

## Decoder Digitale Terrestre - GfK Panelmarket

Febbraio 04 – Luglio 2007 dati bimestrali

Vendite cumulate (sell-out)



Vendite (sell-out)

FONTE: Panel GfK Marketing Services Italia.

Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi



GfK Marketing Services Italia per DGTVi

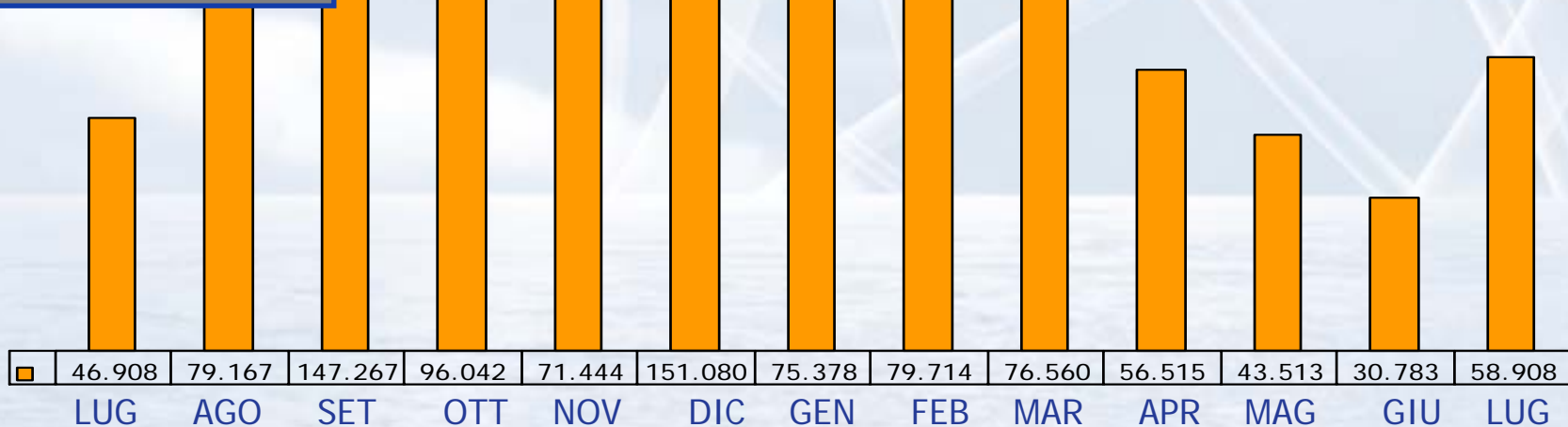
# Decoder Digitale Terrestre – MERCATO TOTALE

Luglio 06 – Luglio 2007

Vendite cumulate (sell-out)



Vendite (sell-out)



FONTE: Panel GfK Marketing Services Italia.

Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi



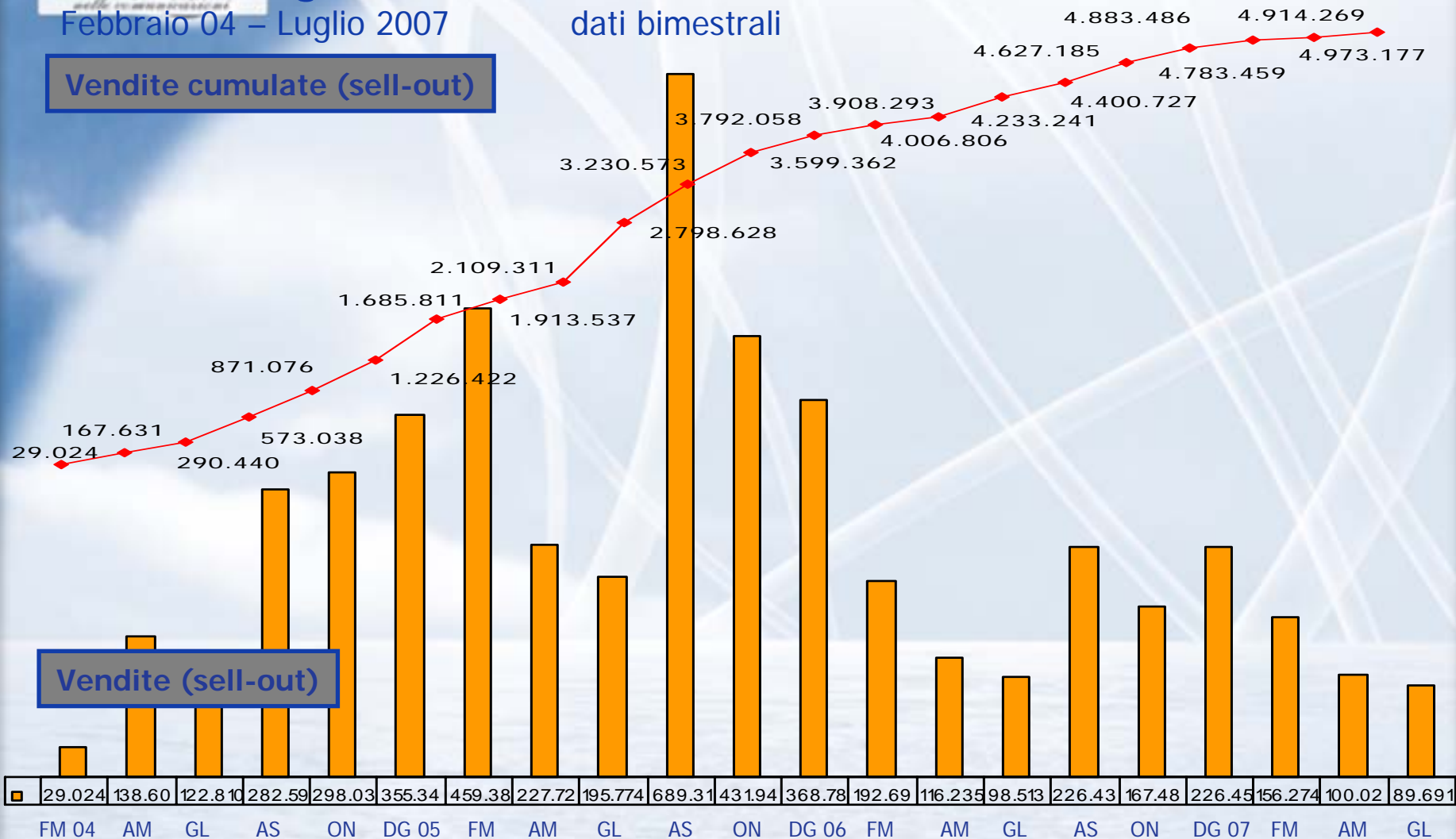
# GfK Marketing Services Italia per DGTVi

## Decoder Digitale Terrestre – MERCATO TOTALE

Febbraio 04 – Luglio 2007

dati bimestrali

Vendite cumulate (sell-out)



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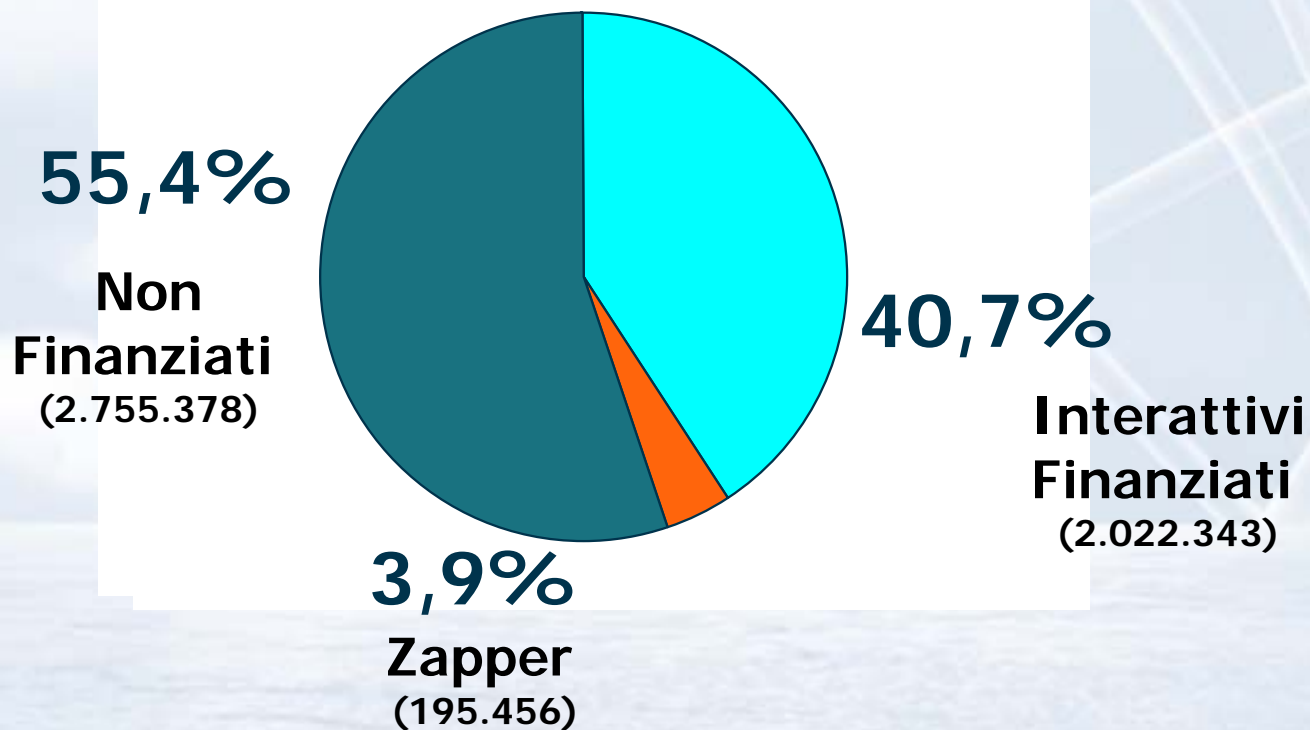
Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi





# GfK Marketing Services Italia per DGTVi Decoder Digitale Terrestre **STIMA MERCATO TOTALE** a fine Luglio 2007

**TOTALE : 4.973.177 (Feb04-Lug07)**



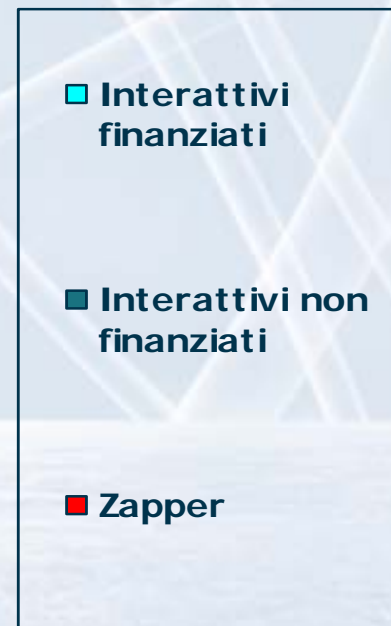
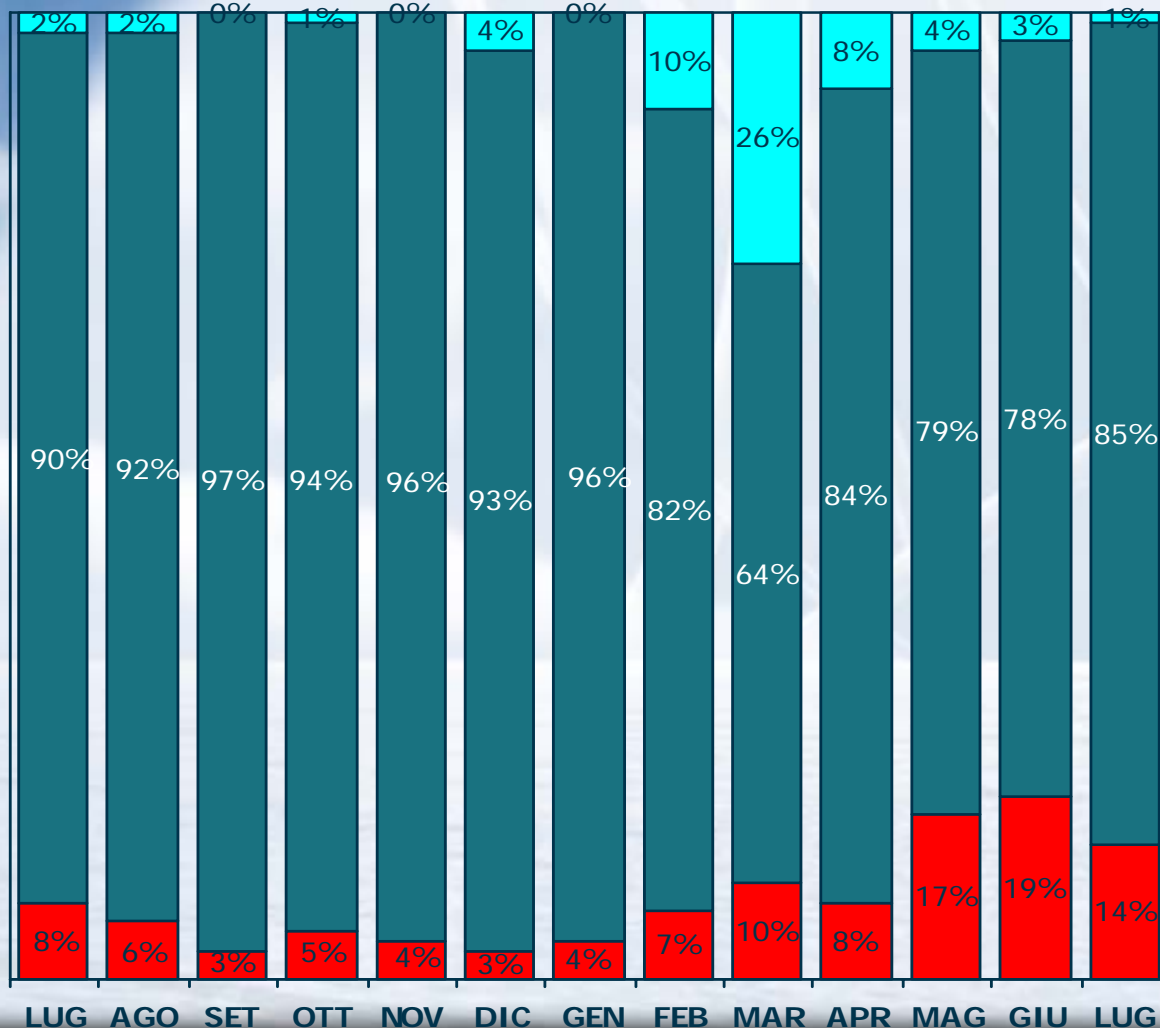
**FONTE: STIMA su Panel GfK Marketing Services Italia e dati Ministero  
Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi**



# GfK Marketing Services Italia per DGTVi

## Decoder Digitale Terrestre - **MERCATO TOTALE** a Luglio 2007

Decoder Interattivi finanziati vs. non finanziati vs. Zapper  
Vendite a quantità



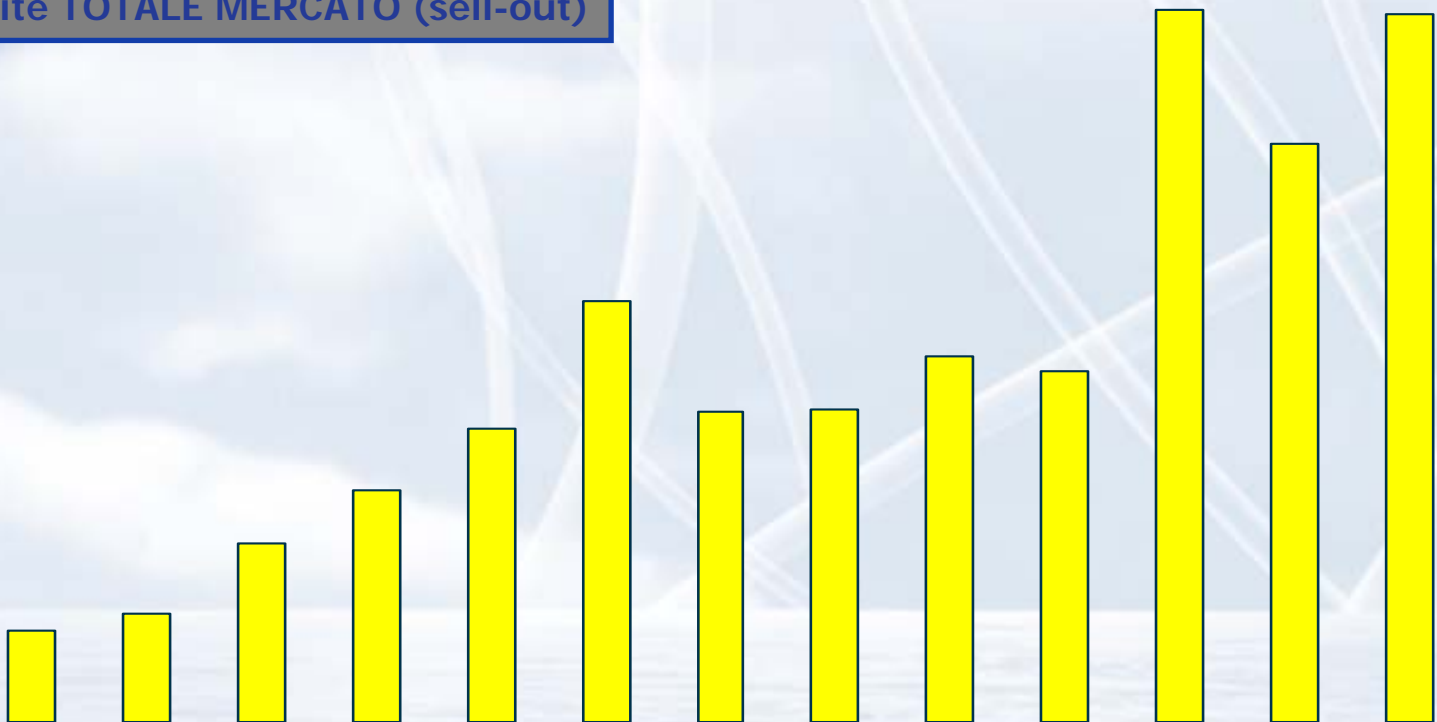


GfK Marketing Services Italia per DGTVi

## Decoder Digitale Terrestre – **TOTALE MERCATO Integrati**

Luglio 06 – Luglio 2007

Vendite TOTALE MERCATO (sell-out)



	lug-06	ago-06	set-06	ott-06	nov-06	dic-06	gen-07	feb-07	mar-07	apr-07	mag-07	giu-07	lug-07
Integrati	10941	12968	21283	27732	35058	50337	37064	37397	43777	41871	85076	69144	84548

**FONTE: Panel GfK Marketing Services Italia.**

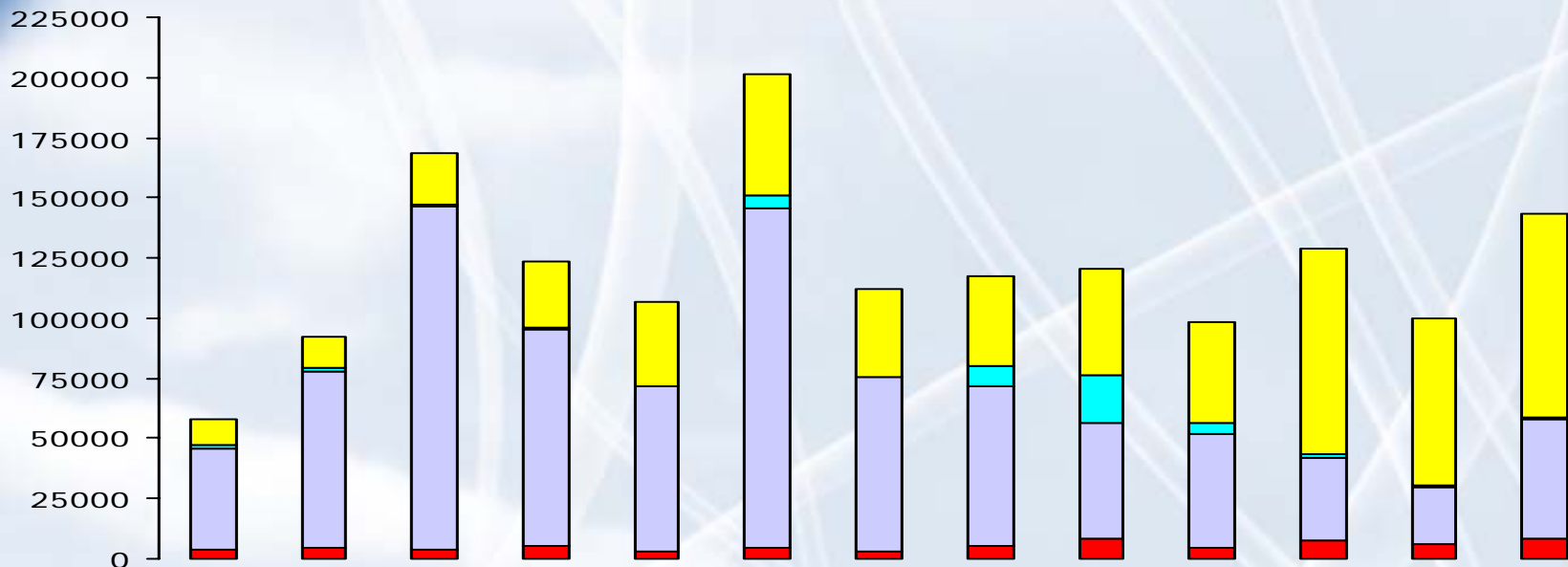
**Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi**

GfK Marketing Services Italia per DGTVi

# Decoder Digitale Terrestre – Tipologie Stand Alone Vs Integrati

TOTALE MERCATO Luglio 06 – Luglio 07

## Vendite TOTALE MERCATO (sell-out)



	lug-06	ago-06	set-06	ott-06	nov-06	dic-06	gen-07	feb-07	mar-07	apr-07	mag-07	giu-07	lug-07
■ INTEGRATI	10941	12968	21283	27732	35058	50337	37064	37397	43777	41871	85076	69144	84548
■ MHP FINANZIATI	1034	1211	688	628	26	5606	0	8366	19884	4565	1643	782	639
■ MHP NON FINANZIATI	42015	73029	142889	90282	68403	140553	72211	65641	48660	47231	34401	24136	49908
■ ZAPPER	5759	9227	1680	1232	1065	2042	1112	4176	1206	9813	1469	989	143
<b>Vendite totali</b>	<b>49</b>	<b>35</b>	<b>551</b>	<b>774</b>	<b>502</b>	<b>417</b>	<b>443</b>	<b>110</b>	<b>337</b>	<b>86</b>	<b>588</b>	<b>27</b>	<b>456</b>

**FONTE: Panel GfK Marketing Services Italia.**

**Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi**

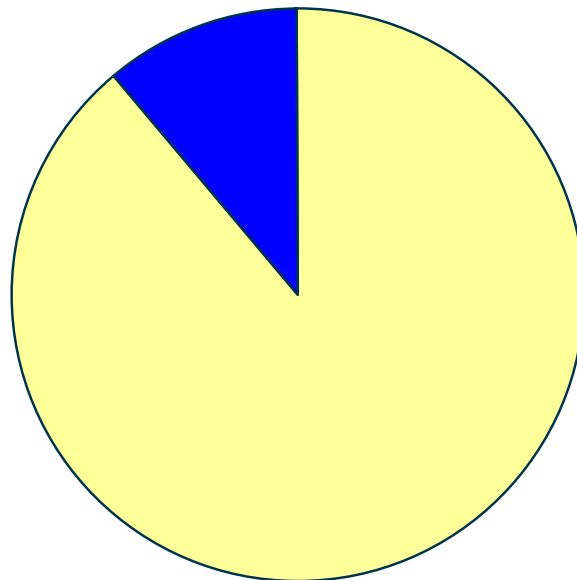


# GfK Marketing Services Italia per DGTVi Decoder Digitale Terrestre & Decoder Terrestre Integrato **STIMA MERCATO TOTALE** a fine Luglio 2007

**TOTALE : 5.598.450 (Feb04-Lug07)**

**Decoder Digitali  
Terrestri integrati  
in altri apparecchi**  
(625.273)

**11,2%**



**88,8%**

**Decoder Digitali  
Terrestri**  
(4.973.177)

**FONTE: STIMA su Panel GfK Marketing Services Italia.  
Rilevazione mensile su un campione di 1.218 punti di vendita rappresentativo di 8.072 negozi**

# **SWITCH-OFF PROCESS**

**3.**

# S/O Process

- **Analogue TV Switch-Off /S/O)**
- First Final date for National S/O: **end 2006** (set in Law n. 66, 2001)
- Second Final date for National S/O: **end 2008** (Decreto Legge n. 273, 22/12/2005)
- S/O date could be postponed (2012 ?)

# S/O Process

- **S/O Transition Process:**
  - Based on a gradual process
  - Based on “all digital” areas
  - Based on dates fixed and well defined with respect to “all digital” areas



# S/O Process

## First “all digital” area: Cagliari and Provincia:

- S/O date: 1 march 2007
- Partial S/O: only 3 digital transmitted programmms
- RETE 4, RAI 2, QOOB

# S/O Process

## Second “all digital” area: Aosta and other 16 Valle d’Aosta villages:

- S/O date: 16 april 2007
- Partial S/O: only 3 TV programs (RAI 2, RETE 4, QOOB)

# S/O Process

- **S/O Calendar planning:**
  - CNID has decided to extend to entire Sardinia S/O of 3 analogue programmes (November/10/2007)
  - CNID has started a program for S/O enlargement with the possibility to include other 2 Italian regions (Trentino Alto Adige and Piemonte)

# S/O Process

- **S/O Calendar planning:**
  - Full S/O (all analogue TV programs) set in Sardinia for March 1 2008
  - Full S/O (all analogue TV programs) set in Valle D'Aosta for October 1 2008

# CNID

4.

# CNID

- The Italian Ministry of Communications has set (Decreto Ministeriale, 4 august 2006) the **Comitato Nazionale Italia Digitale (CNID)** with the following objectives:
  - To define all activities necessary to S/O
  - To coordinate all activities necessary to S/O
  - To identify “all digital” areas
  - To propose the “all digital” areas planning

# CNID

- **CNID structure:**

- **Coordination Group** (Chaired by Ministry Gentiloni and composed by AGCOM, DGTVi, Rai and RTI members)
- **Technical Group** (Chaired by AGCOM and DGTVi, and with participation of AGCOM, Ministry, broadcasters, DGTVi, local TV association))
- **9 Technical area groups**

# CNID

- **CNID area groups:**
  - Communications area
  - Data and research area
  - Customer Care area
  - Networks development monitoring area
  - STB monitoring area
  - Regulatory area
  - Digital planning area
  - DTT contents area
  - Platform coordination area



# CNID

- **Partecipazione to CNID areas:**
  - National Broadcasters
  - Local Broadcasters
  - Ministry of Communications
  - AGCOM
  - Manufacturers
  - Regions
  - Consumer associations
  - Other TV platforms (satellite, IPTV)
  - TV associations, equipment associations, etc.

# Comitato Nazionale "ITALIA DIGITALE"

"Comitato Nazionale Italia Digitale" (Decreto Ministeriale, 4 Agosto 2006)

**Chair:** Ministro delle Comunicazioni

**Partecipanti:** DGTVi, AGCOM, Conferenza Unificata Stato-Regioni, Broadcasters Nazionali, Associazioni emittenti locali, Operatori cavo e satellite, Associazioni consumatori, Regioni 'All Digital' (Sardegna e Valle D'Aosta).

Report mensile

Piano delle Attività

## Gruppo Tecnico

**Co-Chair:** AGCOM e DGTVi

**Partecipanti:** Ministero delle Comunicazioni, Broadcasters nazionali digitali, operatori cavo e satellite.

**Uditori:** Consumatori, Regioni "All Digital", imprese (manifatturieri, distributori, installatori).

9 gruppi di lavoro

Comunicazione

Dati e Ricerche

Assistenza Clienti

Reti

Set Top Box

Regolamen-  
tazione

Normativa

Contenuti

Coordinamento  
Piattaforme

# CNID

- **Example of 24-07-2007CNID meeting themes:**
  - Definition of next S/O dates
  - Extension to whole Sardinia the S/O of Rete4, Rai Due and QOOB
  - Possibility (under study) of next S/O in Piemonte and Trentino
- Hypothesis to impose on the market TV sets with DTT tuner integrated
- Digital Dividend
- Information/Communications campaign to promote DTT (planned for November 2007)

# CNID

- **COMMUNICATIONS AREA:**
  - **Main objectives: Definition and realization of communications events, monitoring of such initiatives, suggestions for financing**
  - **Partecipazione: Broadcasters, Consumers, Local TV association, MinCom**

# CNID

- **DATA AND RESEARCH AREA:**
  - **Definition and setting of data gathering on STB penetration, and other themes, defines relations with specialized data research companies, financing suggestions**
  - **Partecipazione: Broadcasters, AGCOM, MinCom, Associations**

# CNID

- **CUSTOMER CARE AREA:**
  - **Defines adequate custom support , suggests measures to support “weak” population areas, suggests financing forms**
  - **Partecipazione: Broadcasters, AGCOM, MinCom, DGTVi, Associations (Installers, Consumers, etc.)**

# CNID

- **TV NETWORKS DEVELOPMENT AND MONITORING AREA**
  - **Gathering of information relative to DTT network coverages, monitoring of broadcaster networks, promotion of studies related to coverages**
  - **Partecipazione: Broadcasters, MinCom, AGCOM, DGTVi, local TV Association**

# CNID

- **SET TOP BOX AND RECEIVING EQUIPMENT AREA:**
  - **Monitoring of the STB market (price, tech. Char.), decoder and IDTV evolution. Decoder interoperability. Transparency to clients, DTT Numbering.**
  - **Partecipazione: Broadcasters, MinCom, AGCOM; Manufacturers, Distributors; Local TV Associations**



# CNID

- **REGULATORY AREA:**
  - **Defines the regulatory interventions and measures for a correct migration to DTT**
  - **Partecipazione: Broadcasters, DGTVi, AGCOM, MinCom, Local TV Association**

# CNID

- **DIGITAL PLANNING AREA:**
  - **Suggests the modifications necessary to respect the “all digital” area transition as planned, proposes the final national S/O date, financing problems**
  - **Partecipazione: Broadcasters, MinCom, AGCOM, DGTVi, Regions, Local TV Associations**

# CNID

- **DTT CONTENTS AREA:**
  - **Monitor the DTT program offer on the DTT Mux, monitor problems related to content rights on the various platforms**
  - **Partecipazione: Broadcasters, AGCOM, MinCom, Associations**

# CNID

- **PLATFORM COORDINATION AREA:**
  - **Identify single spots on the Italian territory where DTT coverage is not possible, identify Multiplatform potential usage**
  - **Partecipazione: Broadcasters, MinCom, AGCOM, Local TV Associations**