

Digital switch over – Status quo and outlook of UK, France, Spain, Italy and Germany



EMCA

European Media Consulting Association

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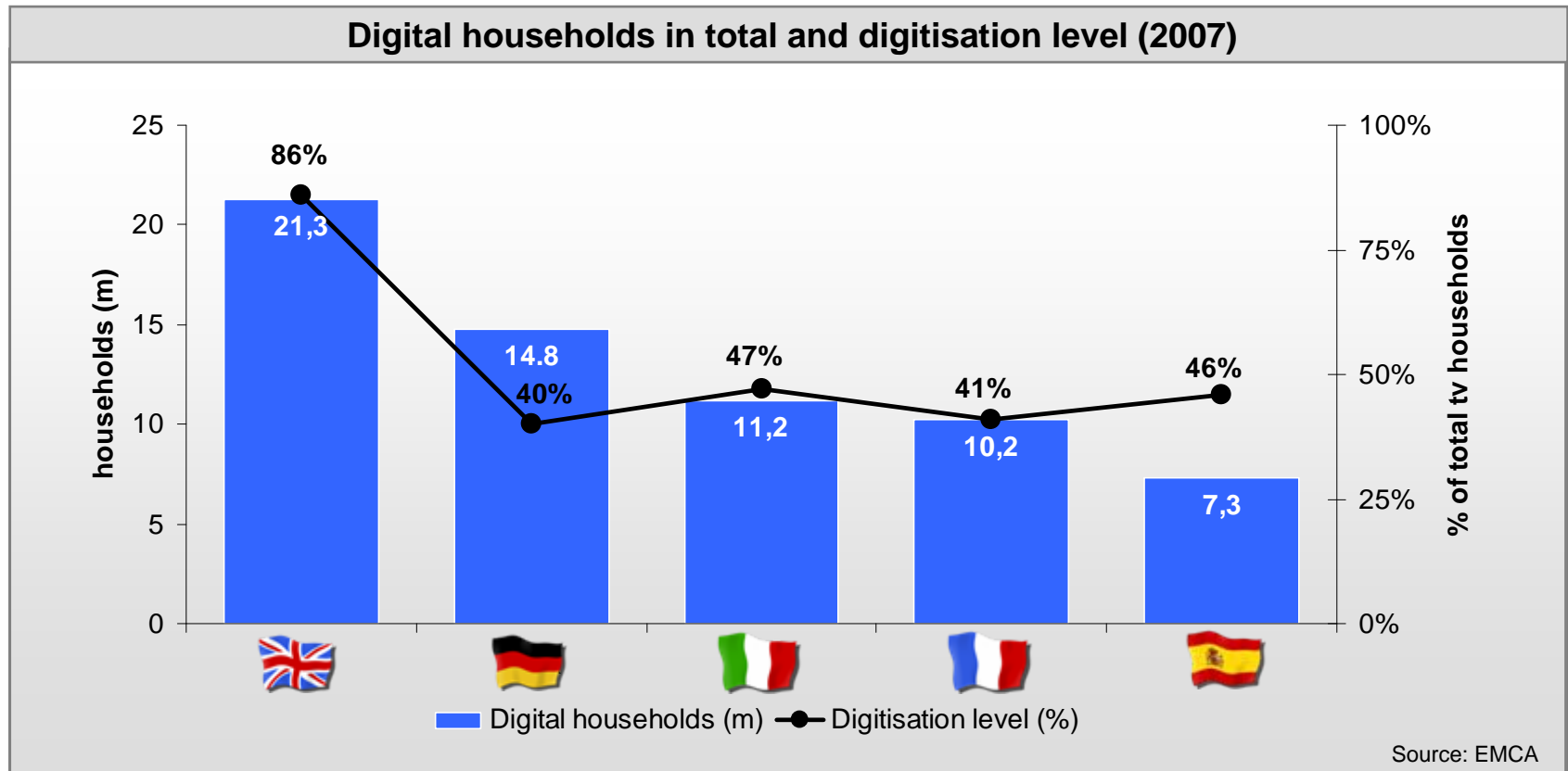
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B. Digital households and digitisation level in total

Digitisation level in UK is by far the highest. Germany is underdeveloped.



- UK is the leading digital TV market where almost nine out of ten TV households are digital.
- Half of the French, Italian and Spanish TV markets are already digitised.
- German market is underdeveloped – only 40% digitisation level.

Content – Digital switch over, EMCA – For each country: UK, France, Spain, Italy and Germany

- A. Overview
- B. Digitisation progress
- C. Regulation
- D. Satellite TV
- E. Terrestrial TV
- F. Cable TV
- G. IPTV
- H. Summary

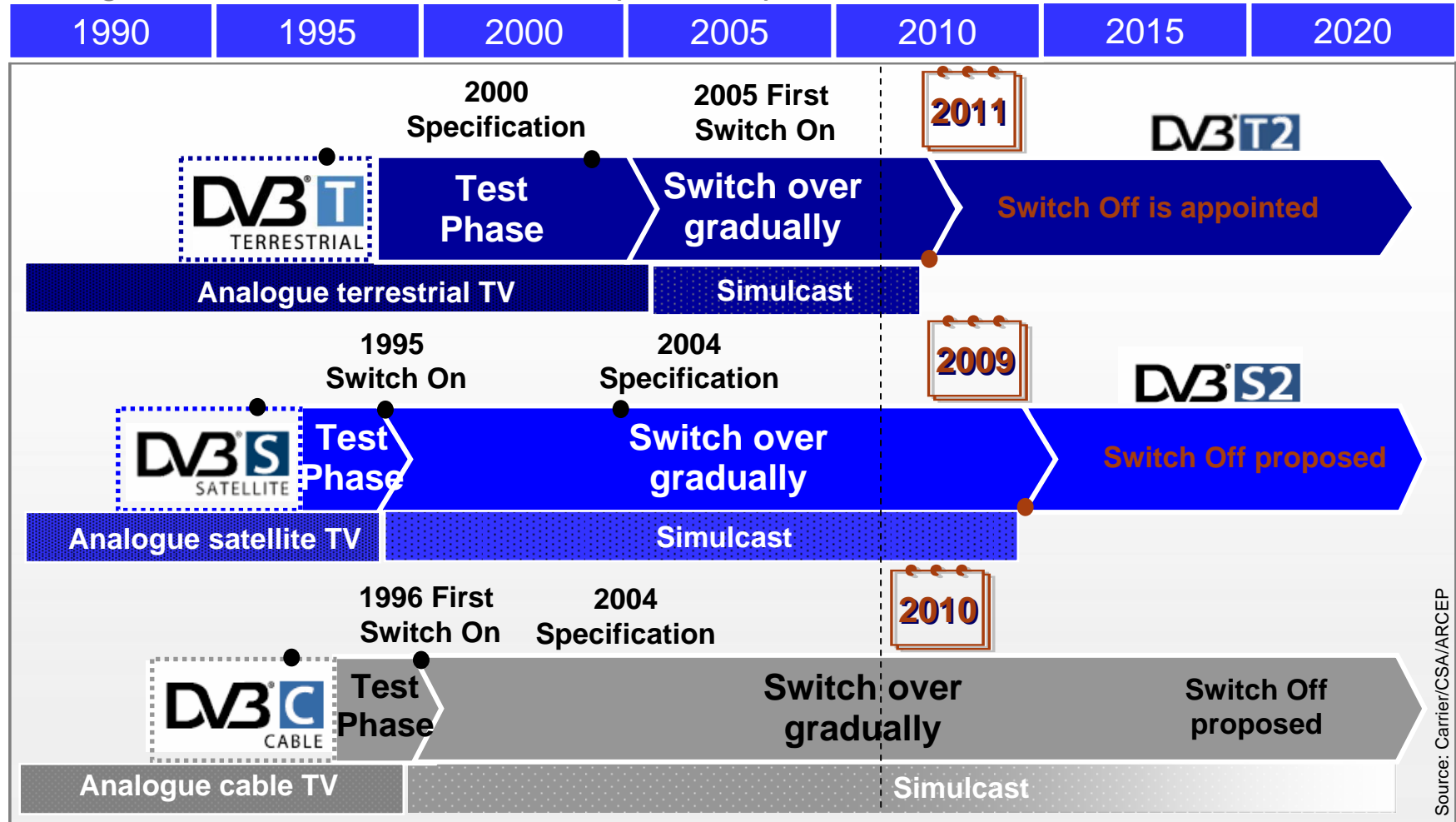




B. Digitisation progress in France

Switch over to be completed by 2012.

Analogue satellite still available to complete footprint of other networks.



Terrestrial switch over is appointed to 2012. Satellite will be digitalized in 2011. But it will take time until Cable is.



F. Digitisation cable television

ntl / Telewest rebranded to Virgin Media (Q1 2007) after purchasing Virgin Mobile.

Status quo

- 92% of all Virgin Media customers are digital.
- 3,106,656 Digital Subs - Number 3 digital TV provider.
- 14% market share of all digital TV households - number 3 digital TV provider
- 13.4% market share of total market (analogue and digital)
- Continue to roll out digital and push their analogue to digital migration strategy - 8% of total subs are still analogue.
- Virgin Media cable network passes through 51% all UK homes.



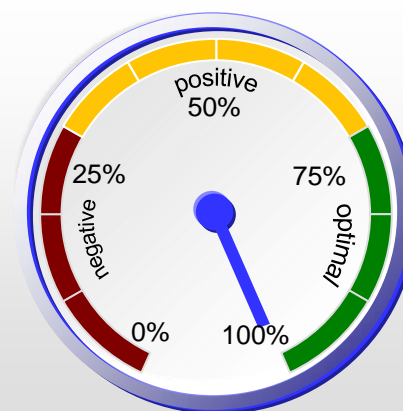
Source: OFCOM & Digital UK Switchover Survey, Sept. 2007 / Virgin Media Corporate Report (2006)

Success factor

- Service strengths: Quad play, VOD, SVOD, Catch Up TV, Linear and VOD/SVOD bundling.
- VOD - 6,000 hours at the end of 2007.
- Cable network rollout.
- Previous ntl brand was badly perceived in some areas of the UK. Virgin Media brand hoped to restore consumer faith in the cable company.

Forecast

Digitisation 2012: 100%



Switch over:
August 2007



VII. Contact Details

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