CFP Presentation Notes: *Panel: After the Triple Play*
David Clark

- Advertisement: make the consumer a partner in gathering and exploiting information.
- The monopoly/public sector story: There is a lot of frustration on what public sector is doing.
    - Some regions will be served by private-public partnerships.
    - For communication services, competition drives the price up, not down (multiple home-pass infrastructures).
- Disruptions:
    - Wireless will not, if HD takes off.
    - Mobile cameras will be full resolution, but not displays.

Panel:

- Steve Whittaker (BT) described why and how he UK market is different
    - TV broadcasting is very strong, which is complemented with free satellite TV.
    - HD is not as strong as in the US.
    - DSL and fiber optic networks are unbundled, which has lead to a split between network and services. In that context, BT promotes an "open ecology".
- Bruce Davie (Cisco) . Is there something for service providers than move bits?
    - Move to "content delivery experiences". Content Delivery Networks become central.
    - Opportunity for standards and solutions for content across multiple SPs.
    - He expressed some concerns about what would really happen if money stops flowing to content providers through existing channels.
- Roberto Saracco (Telecom Italia)
    - Telecommunications in Italy is a $52B industry, while Ads, TV, entertainment, etc is a $26B industry but with lower EBITDA.
    - Instead getting involved in the content industry, he is looking how to get a piece of the rest of the economy (more than 90%). Offer telecommunication services to sector that traditionally have not been part of the industry.
- Cayetano Carbajo (Telefonica)
    - He sees significant opportunities in Video, especially since it currently represents only 2B euros out of 60B euros in global revenues.
    - Video is not as profitable as other services but they need triple play in order to compete.
    - 30%-40% of mobile traffic is video. 80% of fixed traffic is video, most of it free or illegal.
    - Opportunity in CDNs: gives a direct relationship with the customer.
    - Opportunity in managing some third party devices.
    - Challenges with OTT:
        - It can move their place in the value chain
        - Best effort is not longer enough (it can be an opportunity).