




The new opportunities for delivery



DECEMBER 2004




Olivier DUSAUTOIR



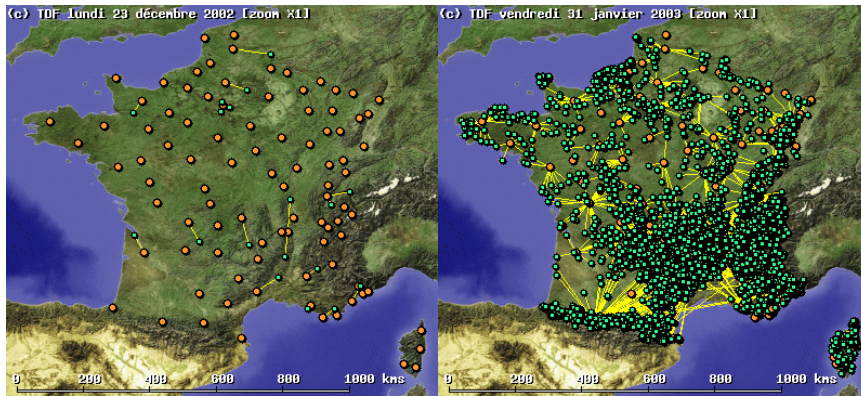
Contents

- Introduction : Reminder of French terrestrial TV Context
- HD stays a priority for TF1
- TF1 Experimentation
- HD Format

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TF1 Analog Coverage



Main network 112 sites

Second network 3161 sites

Coverage > 99% of the population

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French DTT

- Status : The CSA planification is achieved for the first phase (17 sites).
- MPEG2 is the adopted CODEC for free TV.
- For Pay TV the codec is not chosen : but if MPEG4 is accepted, the planification should be revalued.
- Under duress TF1 will launch its TV services in MPEG2 SD ! This will not able to introduce HD in DTT as expected.

R1 Public channels 6 Channels						
R2 Lagardère / Pathé / Bolloré 6 Channels						
R3 Mux Canal+ 5 Channels						
R4 Mux M6 / AB 6 Channels						
R5 5 Channels	Pending channel 1	Pending channel 2	Pending local channel 1	Pending local channel 2	Pending local channel 3	
R6 TF1 / NRJ 5 Channels						

Pay TV

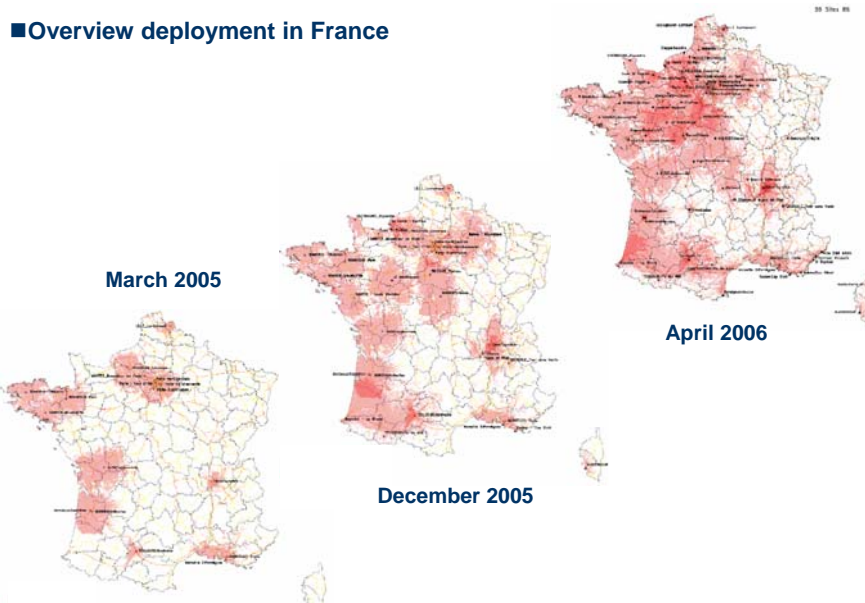
Part of the same group

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Digital network

■ Overview deployment in France



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Digital network

■ European situation



Yellow : DTT already launched

Green : limited DTT

Blue : imminent DTT launch

Unfortunately, there is no decision for HD on DTT networks all over Europe.

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HD and TF1

High Definition (HD) is the new standard for producing and broadcasting digital television and more and more advance indication show that HD arrival in EU is imminent :

- ◆ Consumers are requesting DVD quality ; HD DVD is coming progressively and could be the future viewer reference even if they are not HD equipped
- ◆ Strong and innovative strategies in Asia (Japan) and the USA - with HD, have enabled the launching of DTT with a real locomotive for promoting digital television,
- ◆ More than 50% of flat panel monitors are HD compatible,
- ◆ Progress realized in compression technology enables HD broadcasting,
- ◆ Channels and producers are investing in HD equipment, and HD contents are now available.
- ◆ Through HD French Task force , French TV actors are motivated with the added value on HD...

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HD and TF1



Launching date : jully By the « Ministère de l'industrie ».

41 members(éditeurs, distributors, Industrials manufacturers)

3 mains missions :

- Promote HD,
- Set up a HD label,
- To experiment a complete HD channel (production/diffusion)

(Forum On Eutelsat)

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HD and TF1

High Definition (HD) is a natural response for the greatest quality claimed by the TV Viewer :

◆ TF1 video has increased its sales of 54% for DVD between 2002 and 2003.

◆ TF1 video, will launch for christmas several HD DVD (video encoded with VC9)

"Le Fabuleux Destin d'Amélie Poulain"

"Casino" en DVD HD"

◆ Increase of 144,3% sales for home cinema between 2003 and 2002.

(source GFK : Consumer Electronics : France)



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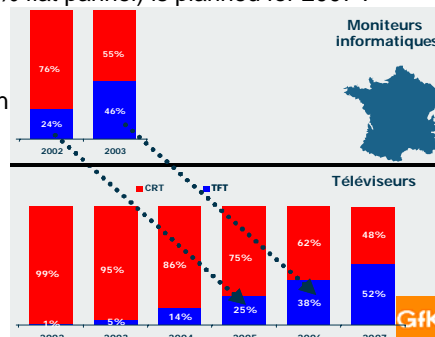
HD and TF1

- Flat displays with HD resolution are available.



- The cross point (50% of CRT / 50% flat panel) is planned for 2007 !

- 16% : price of flat panel between july and october
- www.fnac.com (source TF1 DTMI)

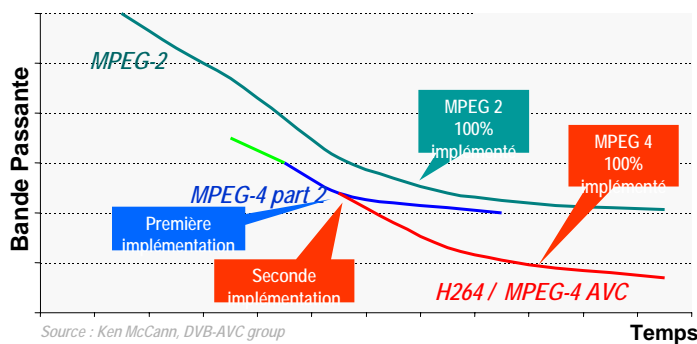
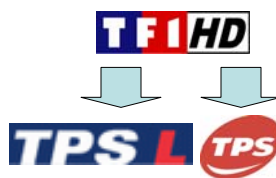


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HD and TF1

TF1 will launch TF1 HD via satellite and ADSL on September 2005. H264 (encoder and set top boxes) will enable to optimize the bandwidth use.



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HD and TF1

TF1 events shooting in HD during 2004



- Ushuaia (Norvège)
- Navarro, Commissaire Moulin
- Smart Roadster
- JT
- GP F1 Allemagne
- Star Academy
- JO athènes
- Auto moto/ Tele Foot
- Vendée Globe
- BMW/MERCEDES
- Commémoration de la libération de Paris
- PSG/CSK Moscou (Slowmo)
- ...



TF1 begins to have experiences and feedbacks with HD production.

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HD and TF1

➤ Expectations : Enabling HD in 2005

- at affordable costs (CAPEX, OPEX)
- while SD broadcasting
The new TF1 Playout is HD compliant!
- for the largest audience
- with the best quality
- compliant with available Consumer & Broadcast products



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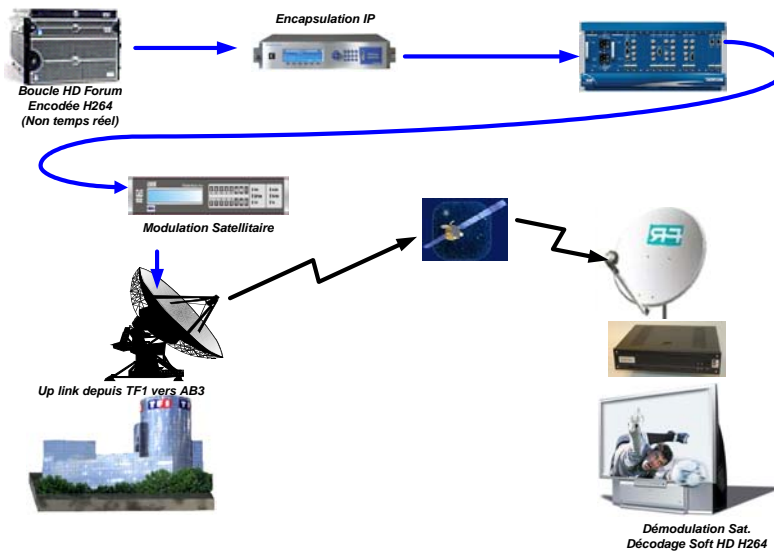
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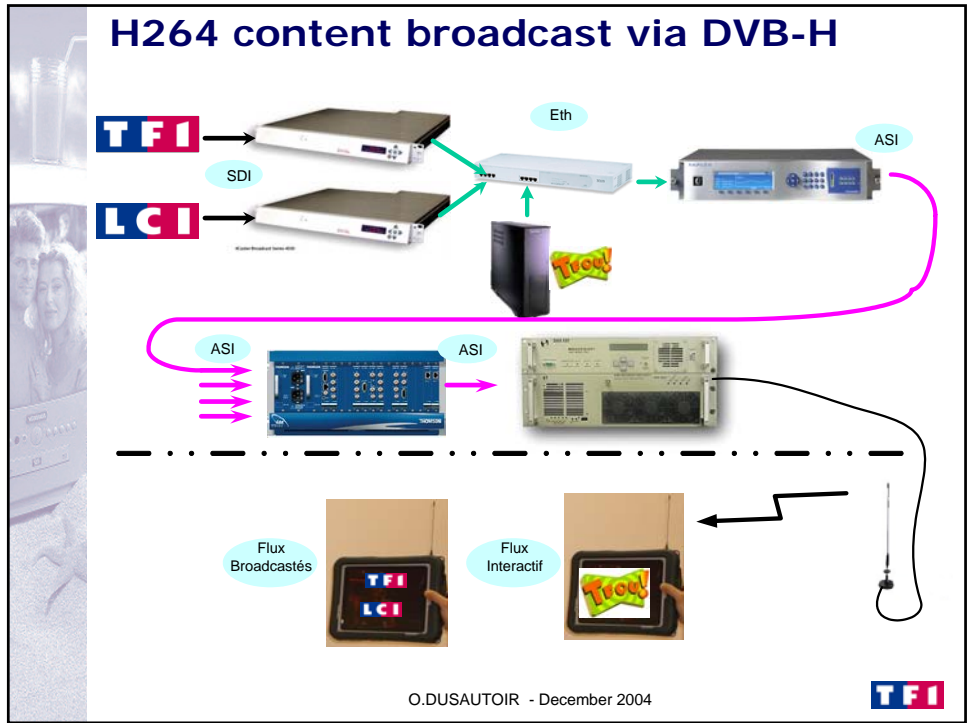


HD H264 content broadcast via satellite



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HD H264 content broadcast via satellite

A pragmatic approach

- ◆ HD 1080 P is the ultimate format for HD
- ◆ 720P50 is not a revolution just an evolution
- ◆ 720P 50 is not SMPTE Normalised
- ◆ There are not so many PDP or LCD with true HD resolution : 1368*768 required a complex resizing (720/768).
- ◆ HD display 1920 * 1080 are already available !



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