

27-28
September 2018

STATES GENERAL

The main themes will be the vision of the market, and research aimed at defining the passage of the media center in the next decade

Salerno



UNIVERSITÀ DEGLI STUDI
DI SALERNO



Prepared by HDFI Organization Committee





Two days, 27 and 28 September 2018

In partnership with Università di Salerno and with IHS Markit collaboration

Closed-door conference and debate among HDFI Associates to focus on trends applicable to possible transformation of **HDFI**



Focus on the Association's objectives in the coming decade, to better suit the Italian and international television scenario

- Market vision: a research aimed at outlining the trends in the media sector. Open the frontier of Artificial Intelligent (AI) in order to study how it can play key roles for next generation audio-visual platform,
- Together with the **University of Salerno** (Department of Computer Science and Electronic Engineering)
- In collaboration with **IHS Markit** a company committed to perform a market research for HDFI and to present it at the HDFI events in year 2018
- With the support of HDFI Associates and key market leaders
- **Preparation of a guideline document highlighting HDFI transformation objectives**



Events Partner



University of Salerno

UNIVERSITÀ DEGLI STUDI DI SALERNO

The Department of Business Sciences - Management & Innovation Systems (DISA-MIS) is aimed at the world of entrepreneurial realities and complex organizations, pursuing the goal of training young people able to enter the labor market in a competitive way, collecting the global challenge related to the request for emerging professionalism. With its multiple interdisciplinary research programs and the broad educational and training offer, DISA-MIS pursues the objective of investigating and transferring knowledge related to strategic decisions and management activities of economic institutions and businesses in particular.

IHS Markit



IHS Markit

IHS Markit is a world leader in critical information, analytics and solutions for the major industries and markets that drive economies worldwide. The company delivers next-generation information, analytics and solutions to customers in business, finance and government, improving their operational efficiency and providing deep insights that lead to well-informed, confident decisions. IHS Markit has more than 50,000 business and government customers, including 80 percent of the Fortune Global 500 and the world's leading financial institutions.



IHSMarkit Project Overview - "Understanding and forecasting the future of the TV and media industry"

HD Forum Italia is an association established to promote, support and disseminate the use of Audiovisual and multimedia content, High Definition, Ultra High Definition and 3D products and technologies and any other emerging Audiovisual solutions.

HD Forum Italia and its members are constantly reviewing their strategies and to inform this they require robust insights on how TV consumption by Italian consumers will change over the next decade. This should cover consumer electronic hardware, content and delivery will evolve, as well as consumption patterns.

This information and insight will serve the two underlying objectives of this engagement:

1. To guide and inform the HD Forum to best define its future agenda and wider purpose of supporting its members.
2. To provide valuable insights to its members so they further benefits from their participation in the forum.

Understanding and forecasting the future of the TV and media industry is a core focus at IHS Markit, with our analysts maintaining ongoing relationships with key individuals at companies across the technology, TV, gaming, music, publishing and movie sectors. These relationships, and the resulting in-depth understanding of the sectors, form the basis of our continuously updated online Intelligence databases which are used widely by players in the media industry, including broadcasters and platforms, film studios, pay TV channel groups, connected TV, record labels, publishing groups, investors and technology providers.



IHSMarkit: Research dedicated to HDFI's States General "Understanding and forecasting the future of the TV and media industry"

IHS Markit has developed for us an industry research that provides us with macro- indicator details as key elements to stimulate our reflection and debate. IHS Markit will help us to evaluate the topics and share the points of view that each of us is invited to bring as a key contributions to the work of the second day of the States General.



Understanding and forecasting the future of the TV and media industry

Paul Gray, Research Director

21 Sept 2018

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Date: 27 September 2018

Location: Università di Salerno, Department of Business Sciences, Management e Innovation Systems (DISA-MIS), Campus Fisciano - Via Giovanni Paolo II, 132 (Salerno)

Day 1 Agenda

- **14:15** Convening to the meeting room
- **14:30** Welcome by University of Salerno, Prof. Aurelio Tomasetti (Rector), Prof. Vincenzo Loia (DISA-MIS)
- **15:00** Presentation of the "States General" project - prospects for renewal of the Mission of the Association
- **15:30** Presentations of Media Market outlook by:
 - **PwC** (Filippo Schemoz)
 - **Altran** (Luca Quattropiani)
 - **Kineton** (Giuseppe Aprea)
- **16:30** Presentation of Market Research: "**Understanding and forecasting the future of the TV and media industry**" - (Paul Gray & Maria Rua Agnete, IHS Markit)
- **18:00** End of Day 1 – Bus transfer to the Amalfi Coast - Networking dinner at Raito Hotel



Date: 28 September 2018

Location: Hotel Raito, Amalfi Coast

Day 2 Agenda (Close door session)

- **09:00** Convening to the meeting room
- **09:15** Start of session: key highlights from research produced by IHS Markit
- **09:45** Open debate with intervention by all individual HDFI Council Members
- **11:30** Coffee break and networking
- **12:15** Key elements to set a guideline document for HDFI transformation objectives
- **13:15** Conclusion and update about Annual Conference plan
- **13:30** End of Day 2


raitohotel
amalfi coast





HDFI Councilors Attendance List (19)

Gino Alberico	RAI Radiotelevisione Italiana
Giuseppe Aprea	Kineton
Riccardo Armussi	Nagra Vision
Giovanni Ballocca (acting)	Sisvel
Vilim Bartolucci	Fastweb
Alessandro Battista	LGE
Marcello Berengo Gardin	Sky
Andrea Borgato	Dolby
Motoshi Bito	Vestel
Renato Farina	Eutelsat
Francesco Leveque	Samsung
Vlaho Kostov	Panasonic
Benito Manlio Mari	Sony
Marco Pellegrinato	Mediaset
Luigi Rocchi	RAI Radiotelevisione Italiana
Stefania Sagona	TIM
Giorgio Tornielli	Luthec
Sebationo Trigila	FUB
Riccardo Vescovi (acting)	Fincons

Guest Attendance List (9)

Michele Festuccia	Cisco
Marina Francesconi	Eutelsat
Ciro Gaglione	Member of JTG (Sky)
Paul Gray	IHS Markit
Rolando Paludo	Member of JTG (Sony)
Luca Quattropani	Altran
Alessandro Cavicchia	Altran
Luigi Troiano	Università di Salerno
Andrea Michelozzi	Organization (Dime Com)
Maria RuaAguete	IHS Markit (Remote connection)

HDFI 2018 Events

Partner, Sponsors and Supporters



States General Event Partner: Università degli Studi di Salerno,
Dpt. di Scienze Aziendali, Management e Innovation Systems (DISA-MIS)
Liaison officer: **Prof. Luigi Troiano**



Research Partner: IHS Markit
Liaison officer: **Paul Gray**



HDFI Organisation Committee:

Marco Pellegrinato, Benito Mari,
Sebastiano Trigila, Luigi Rocchi,
Renato Farina, Marcello
Berengo Gardin, Gino Alberico,
Vittorio Arrigoni, Andrea
Michelozzi.

Key supporters:



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Organization by



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