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**Ministro  
per l'Innovazione  
e le Tecnologie**

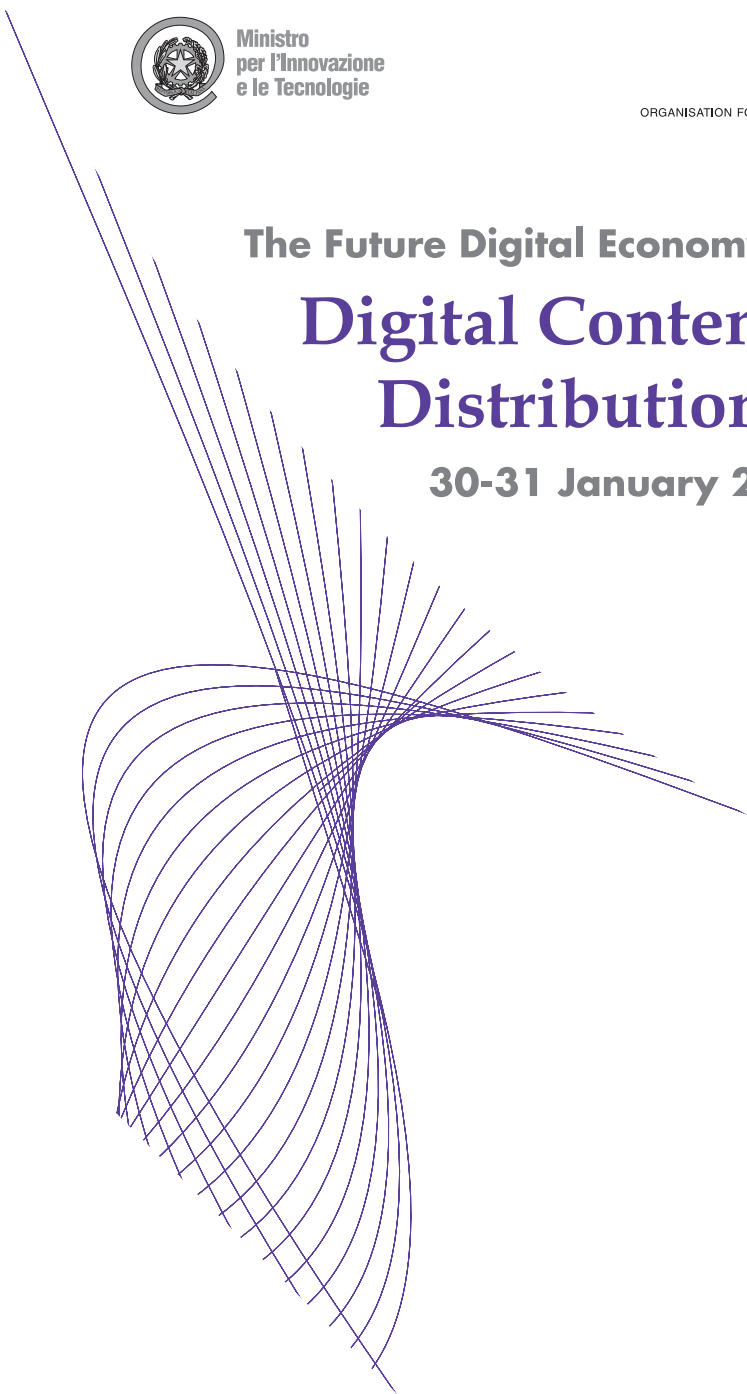


ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

**The Future Digital Economy**

# **Digital Content Creation, Distribution and Access**

**30-31 January 2006, Rome - Italy**



Day	Time	Topics
Monday 30.01	8.30	<b>Registration</b>
	9.30	<p><b>Introductions: Daniela Battisti</b>, Cabinet of the Italian Minister for Innovation and Technologies / Vice-Chair, OECD Working Party on the Information Economy</p> <p><b>Chair Day 1: Welcome</b></p> <p><i>The importance and role of digital content: Encouraging production and enhancing access</i></p> <ul style="list-style-type: none"> <li>- Lucio Stanca, Italian Minister for Innovation and Technologies</li> <li>- Donald J. Johnston, Secretary-General, Organisation for Economic Co-operation and Development</li> </ul>
	10:05	<p><b>Broadband and digital content: Creativity, growth and employment</b></p> <ul style="list-style-type: none"> <li>- Chin Dae-Je, Korean Minister of Information and Communication</li> <li>- Michael J. Copps, US Federal Communications Commissioner</li> <li>- Marco Tronchetti Provera, Vice President Confindustria / Chairman Telecom Italia</li> <li>- Rita Hayes, Deputy Director General, Copyright and related Rights and Industrial Relations, World Intellectual Property Organization</li> <li>- Philip J. Jennings, General Secretary, Union Network International</li> </ul> <p><b>Chair:</b> Bruno Lamborghini, Vice-Chair, OECD Business and Industry Advisory Committee to OECD (BIAC)</p>
		<b>Short coffee break</b>
		<b>Digital content opportunities and challenges: Changing value chains and business models</b>
	11:30	<p><b>Overview:</b> Hiroaki Yoshihara, Vice-Chair and Global Managing Partner, Global Markets, KPMG International</p>
	11:40	<p><b>Perspectives on opportunities and challenges:</b></p> <ul style="list-style-type: none"> <li>- Linda Jensen, CEO Home Box Office Central Europe</li> <li>- Jenny Toomey, Musician / Director, Future of Music Coalition</li> <li>- Alberto Tripi, President Federcomin, Italian ICT Federation</li> <li>- Sir Martin Sorrell, Group Chief Executive, WPP / Co-chair Annual Meeting World Economic Forum 2006</li> <li>- James Love, Director, Consumer Project on Technology</li> </ul> <p><b>Chair:</b> Hal R. Varian, Professor, School of Information Management, University of California at Berkeley</p>
	13.00	<b>Lunch</b>

		<b>New developments: Parallel panel sessions</b>	
	14:30	<p><b>A) New platforms and content delivery opportunities</b></p> <ul style="list-style-type: none"> <li>- Yozo Omori, Executive Director &amp; Board, Mobile Content, Index Corporation</li> <li>- Arndt Rautenberg, Chief Strategy Officer, Deutsche Telekom</li> <li>- Donald M. Whiteside, Vice President Corporate Technology Group, Intel</li> <li>- Luca di Mauro, Chief Economist, Sky Italia</li> <li>- Jung Ju Kim, CEO Nexon Corporation, Multiplayer games</li> <li>- Didier Huck, Vice President, Public Affairs and Regulation, Thomson</li> </ul> <p><b>Chair:</b> Ben Keen, Chief Analyst, Screen Digest</p>	<p><b>B) New user habits and social attitudes</b></p> <ul style="list-style-type: none"> <li>- David Sifry, President, Technorati</li> <li>- David Day, Managing Director, EMEA Nielsen//NetRatings</li> <li>- Jens Uwe Intat, Vice President and General Manager Europe, Electronic Arts</li> <li>- John B. Horrigan, Associate Director, Pew Internet &amp; American Life Project</li> <li>- Frieda Brioschi, President, Wikipedia and Wikimedia Italia</li> </ul> <p><b>Chair:</b> Urs Gasser, Professor and Director, Research Center for Information Law, University St. Gallen</p>
	16:05	Coffee break	
	16:25	<p><b>A) Creation and access to content and the role of new commercial agreements</b></p> <ul style="list-style-type: none"> <li>- Andrew Burke, CEO British Telecom Entertainment</li> <li>- Chris Castle, Senior Vice President, Legal Affairs and General Counsel, SNOCAP</li> <li>- Stefano Parisse, Director, Fastweb</li> <li>- Alex Ogilvie, Vice President, Business Development Europe, Warner Bros. International TV</li> <li>- Justin Kniest, Managing Director Fabchannel</li> </ul> <p><b>Chair:</b> Jean-Jacques Sahel, UK Department of Trade and Industry / Chair OECD Working Party on the Information Economy</p>	<p><b>B) Enhanced access to research and public sector information. A new growth driver?</b></p> <ul style="list-style-type: none"> <li>- Herbert Burkert, Professor, University of St. Gallen / Fraunhofer Institut for Media Communications</li> <li>- Luis Rodriguez Moreno, Executive Director, Cervantes Virtual Project</li> <li>- Sally Morris, Chief Executive, Association of Learned and Professional Society Publishers</li> <li>- Charles Oppenheim, Professor, Loughborough University</li> <li>- David C. Prosser, Director, Scholarly Publishing and Academic Resources Coalition Europe</li> </ul> <p><b>Chair:</b> Juan Carlos De Martin, Professor, University Politecnico di Torino</p>

		<i>In plenary</i>
	18:10	Jonathan Taplin, Professor, Annenberg School for Communication, University of Southern California
	18:20	<i>Wrap-up</i> <b>Rapporteur afternoon stream A, Day 1:</b> Eli M. Noam, Professor and Director, Columbia Institute for Tele-Information, Columbia University <b>Rapporteur afternoon stream B, Day 1:</b> Len Waverman, Professor, London Business School
		<b>Direct transfer to the dinner venue</b>
	20:00	<b>Conference dinner offered by the Government of Italy</b> <b>Welcome by Minister Lucio Stanca</b>  <b>Dinner speech:</b> Terry Fisher, Professor and Director, Berkman Center for Internet and Society, Harvard University

Day	Time	Topics
<b>Tuesday</b> <b>31.01</b>	9:00	<b>Chair Day 2:</b> Welcome Nobuo Tanaka, Director for Science, Technology and Industry, Organisation for Economic Co-operation and Development
	9:05	<i>New ways to access knowledge and content: Content digitisation by commercial players and public institutions</i> <ul style="list-style-type: none"> <li>- Paul Gerhardt, Project Director, Creative Archive, British Broadcasting Corporation</li> <li>- Jens Redmer, Director of Google Book Search, Europe</li> <li>- Eric Saltzman, film producer / Board of Directors, Creative Commons</li> <li>- Bradley Horowitz, Director of Technology Development, Yahoo!</li> <li>- Mihály Jambrik, Hungarian State Secretary, Ministry of Informatics and Communications</li> </ul> <b>Chair:</b> Julie E. Cohen, Professor, Georgetown University Law Center  <b>Rapporteur:</b> Michael Geist, Professor, Canada Research Chair in Internet and Ecommerce Law, University of Ottawa
	10:45	Coffee break

11:10	<p><b><i>Are digital media and the Internet changing creative supply?</i></b></p> <ul style="list-style-type: none"> <li>- Kan'ichiro Aritomi, Vice-Minister for Policy Coordination, Japanese Ministry of Internal Affairs and Communications</li> <li>- Adam Klein, Executive Vice President, Strategy &amp; Business Development, EMI Music</li> <li>- Max Pezzali, Musician</li> <li>- Rachel Clark, Director, Broadcasting and Content, UK Department of Trade and Industry</li> <li>- Philippe Kern, Secretary General, Independent Music Companies Association</li> </ul> <p><b>Chair:</b> Paul Hoffert, Professor / composer, musician / Chair Guild of Canadian Film Composers</p> <p><b>Rapporteur:</b> Gilles Le Blanc, Professor and Director, Centre for Industrial Economics, École Nationale Supérieure des Mines de Paris</p>		
12.30	<p><b>Lunch</b></p>		
13:45	<p><b>Business and policy solutions: Emerging issues and implications</b></p> <p><b>Parallel sessions</b></p>		
	<table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p><b><i>A) Content creation</i></b></p> <p><b><i>Building the right environment for innovation</i></b></p> <ul style="list-style-type: none"> <li>- Rachel Dixon, CEO Handshake Media / Australian Strategic Digital Content Industry Leaders Group</li> <li>- Mark Esseboom, Director, Dutch Ministry of Economic Affairs, DG for Energy and Telecom</li> <li>- Andrea Camanzi, Chairman, Business and Industry Advisory Committee to OECD (BIAC) ICCP Committee</li> <li>- Marianne Rønnebak, Director and Deputy Permanent Secretary, Danish Ministry of Science, Technology and Innovation</li> <li>- Yossi Vardi, Chairman International Technologies / Member World Economic Forum ICT &amp; Media Industry Community</li> </ul> <p><b>Chair:</b> Richard Simpson, Director General, Electronic Commerce, Industry Canada</p> </td> <td style="width: 50%; vertical-align: top;"> <p><b><i>B) Content diffusion</i></b></p> <p><b><i>IPR, DRM, licensing, content security, standards</i></b></p> <ul style="list-style-type: none"> <li>- Barney Wragg, Senior Vice President eLabs, Universal Music Group International</li> <li>- Sarah Deutsch, Vice President and Associate General Counsel, Verizon Communications</li> <li>- Giorgio Assumma, President, SIAE, Italian Collecting Society</li> <li>- Stan Liebowitz, Professor, Center for Analysis of Property Rights and Innovation, University of Texas</li> <li>- Leonardo Chiariglione, CEO and Digital Media Strategist, CEDEO.net</li> <li>- Fred Von Lohmann, Senior Intellectual Property Attorney, Electronic Frontier Foundation</li> </ul> <p><b>Chair:</b> Marco Ricolfi, Professor, University of Turin, Law School</p> </td> </tr> </table>	<p><b><i>A) Content creation</i></b></p> <p><b><i>Building the right environment for innovation</i></b></p> <ul style="list-style-type: none"> <li>- Rachel Dixon, CEO Handshake Media / Australian Strategic Digital Content Industry Leaders Group</li> <li>- Mark Esseboom, Director, Dutch Ministry of Economic Affairs, DG for Energy and Telecom</li> <li>- Andrea Camanzi, Chairman, Business and Industry Advisory Committee to OECD (BIAC) ICCP Committee</li> <li>- Marianne Rønnebak, Director and Deputy Permanent Secretary, Danish Ministry of Science, Technology and Innovation</li> <li>- Yossi Vardi, Chairman International Technologies / Member World Economic Forum ICT &amp; Media Industry Community</li> </ul> <p><b>Chair:</b> Richard Simpson, Director General, Electronic Commerce, Industry Canada</p>	<p><b><i>B) Content diffusion</i></b></p> <p><b><i>IPR, DRM, licensing, content security, standards</i></b></p> <ul style="list-style-type: none"> <li>- Barney Wragg, Senior Vice President eLabs, Universal Music Group International</li> <li>- Sarah Deutsch, Vice President and Associate General Counsel, Verizon Communications</li> <li>- Giorgio Assumma, President, SIAE, Italian Collecting Society</li> <li>- Stan Liebowitz, Professor, Center for Analysis of Property Rights and Innovation, University of Texas</li> <li>- Leonardo Chiariglione, CEO and Digital Media Strategist, CEDEO.net</li> <li>- Fred Von Lohmann, Senior Intellectual Property Attorney, Electronic Frontier Foundation</li> </ul> <p><b>Chair:</b> Marco Ricolfi, Professor, University of Turin, Law School</p>
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	15:15	Coffee break
	15:45	<p><b>Policy Roundtable: Identifying priority issues, tools and policy challenges: Moving forward</b></p> <ul style="list-style-type: none"> <li>- Masakazu Toyoda, Director-General, Japanese Ministry of Economy, Trade and Industry</li> <li>- Pasquale Pistorio, Honorary President STMicroelectronics / Vice President Confindustria for Research &amp; Innovation</li> <li>- Marybeth Peters, U.S. Register of Copyrights, United States Copyright Office</li> <li>- Andrea Pontremoli, CEO and Chairman, IBM Italy</li> <li>- Fabio Colasanti, Director-General, Information Society &amp; Media, European Commission</li> <li>- Aurelio De Laurentiis, film producer, Filmauro</li> </ul> <p><b>Chair:</b> Hugo Parr, Chair OECD Committee for Information, Computer and Communications Policy</p>
	17:10	<p><b>Conference conclusions: Rapporteurs</b></p> <p>Day 1 Rapporteur: Terry Fisher, Professor and Director, Berkman Center for Internet and Society, Harvard University</p> <p>Day 2 Rapporteur: Luc Soete, Professor and Joint Director, Maastricht Economic Research Institute on Innovation and Technology and United Nations University Institute for New Technologies</p>
	17:30	<p><b>Closing remarks</b></p> <ul style="list-style-type: none"> <li>- Michael J. Copps, US Federal Communications Commissioner</li> <li>- Donald J. Johnston, Secretary-General, OECD</li> <li>- Lucio Stanca, Italian Minister for Innovation and Technologies</li> </ul>

### Thematic rapporteurs

*Michael Bracy, Co-Founder Future of Music Coalition, Rapporteur Creative community / artist perspective*

*Mark Cooper, Director of Research, Consumer Federation of America, Rapporteur Consumer perspective*

## **Conference session themes**

### **Session 1: Opening session: The importance and role of digital content: encouraging production and enhancing access**

Broadband is the fastest growing and diffusing technology with 144 million subscribers in OECD countries in September 2005 and an estimated 155 million start-2006, equivalent to 1 broadband subscriber for every 7.5 inhabitants. The leading OECD countries have one broadband subscriber for every 4 inhabitants. Next-generation broadband via optical fibre is also growing rapidly and will bring even higher speeds.

With rapidly growing data transmission capacity, attention has turned to supply and use of high quality digital content, as this becomes crucial across content industries, such as media and publishing, music, film and video, games, publishing, research and news distribution. Digital content is also becoming pervasive in sectors not previously considered content producers or users. These include numerous service industries, education and health, and producers and owners of public sector information with potential commercial use, and public sector content such as archives and cultural content. Value chains for content development, production, delivery and use are changing rapidly along with the creation of new business models to exploit these opportunities. These developments raise new business and policy issues related to ensuring market environments that support development and diffusion of new digital content goods and services, promote competition and benefit users.

The first session will introduce the broad themes of the conference, setting the scene for discussion from business, user and policy view-points and identifying priority issues and challenges for the Conference.

### **Session 2: Broadband and digital content: creativity, growth and employment**

This session will focus on the dynamic impact of broadband rollout, its effects on content creation and distribution, and the implications for creativity, economic growth and employment. It will give a set of different perspectives on the development of broadband and digital content, and some of their wider impacts. The session will cover developments in Asia, North America and Europe, and draw out aspects of links between content protection and creativity, growth and employment, and impacts on skills requirements and employment.

### **Session 3: Digital content opportunities and challenges: Changing value chains and business models**

This panel session will further develop the creativity, growth and employment themes laid out in the opening sessions and push them forward from the perspectives of different participants in the value chain. The session will focus on identifying the key developments, opportunities and challenges from individual

perspectives in the digital content value chain reflecting the perspectives of the content industry and artists, the changing roles and challenges for the communications, broadcasting and IT industries, how the advertising industry is adjusting to on-line and digital content opportunities and consumer and citizen views on the challenges of increasing digital content distribution and access.

Key questions to be addressed are:

- What is changing in the value chains and business models in digital content and delivery?
- What are the new opportunities?
- What are the challenges and impediments to digital content applications and delivery routes?

#### **Parallel Sessions 4 and 5: Perspectives on new developments**

These parallel streams will focus particularly on supply-side (stream A) and user perspectives (stream B).

#### **Session 4A: Supply-side perspectives: New platforms and content delivery opportunities**

The presentations and discussion will focus on identifying, from various supply-side perspectives in the digital content value chain, the emergence of new delivery platforms including triple and multiple play, mobile and wireless, and the “digital home”, focusing on development and interactions of content and platforms along the supply side value chain.

Key questions to be addressed are:

- How are new platforms developing, what is working, what is not?
- What is beyond triple play? What new roles are there for mobile and wireless platforms? How do these interact with the development of the “digital home”?
- What are the impacts of new platforms on the delivery of content such as games, music, video, news, information and other content? What are current and likely trends?

#### **Session 5A: Creation and access to content and the role of new commercial agreements**

Reorganisation of value chains is restructuring the interaction between digital content creation and delivery. Potentially, content creators and suppliers are moving downstream into distribution and direct contact with customers (games, music) and publishers and distribution platforms moving upstream into content creation (video). Competitive access to digital content is an important condition for new platforms to grow and compete with established platforms.

Key questions to be addressed are:

- What are the main structural shifts being experienced along value chains?
- To what extent are content creators moving downstream into distribution and distribution platforms moving upstream into content creation?
- Is the role of intermediaries changing and what is the impact on content creation?



- Are these shifts changing business and revenue models and commercial agreements?
- How do new platforms perform in terms of access to content; are there particular bottlenecks to content access and delivery from these platforms?

#### **Session 4B: User-side perspectives: New user habits and social attitudes**

Market development is driven by the interaction between technological potential, commercial innovation and socio-economic acceptance and uptake of new goods and services, even if the supply side is offering a wide and rapidly changing array of digital content and delivery platforms. This stream will focus on the demand, access and use side for digital content and how the demand and use side potentially influences content development and distribution to match demand and use.

Key questions to be addressed are:

- Are there new socio-economic and demographic drivers of content demand? What are they and how is the supply side adapting to these demands?
- Are completely new demands and markets developing for content, or is it largely digitisation of established content (audio, video, entertainment, news etc.)?
- To what extent is the rise of multiplayer online games and new online communities (blogs, creative projects such as Wikipedia, games) a major phenomenon?
- Are these demand and user side phenomena a sign of enduring change – or ephemeral fashions?
- What is the impact of user-created content and are there bottlenecks to its creation and diffusion?

#### **Session 5B: Enhanced access to research and public sector information. A new growth driver?**

There is large potential demand for public sector information and content ranging from weather and location information through to literature and cultural content (museums, literature, archives etc.). And with the explosion of research and professional information, there is a major demand for improved ways of accessing, organising and managing it to enhance the spread of knowledge and drive knowledge-based growth. In these areas easier access to information and knowledge is viewed as an important growth driver, raising access and pricing issues and questions of new kinds of “open access”, particularly when they involve public funding of the development of digital information and content. In these areas there are elements of the “public good” and major commercial opportunities, both of which are affected by increasingly easy distribution and access. This session will focus on recent experience in trying to meet new demands and use and exploring potential cross-fertilisation between different areas.

Key questions to be addressed are:

- What are the major challenges to making public sector information and content more accessible and meeting potential demand? Where is demand greatest and how is this being met? How are pricing issues being tackled?

- What are the interactions between commercial and public sectors and how does this vary across different areas of public sector information and content?
- Research and professional information have been innovative leaders in adopting new distribution models and hybrid access models to distribute content and information – what are the trends and what lessons can be learned?
- What are the most important features of the research and professional information distribution models in areas of distribution efficiency, access and intellectual property, and to what extent can they be applied to emerging areas of public sector information and content?

## **Session 6: New ways to access knowledge and content: Content digitisation by public**

### **institutions and new commercial players**

New intermediaries and established institutions are entering the middle ground of commercial innovation and new ways of supplying content. New participants and distribution mechanisms are increasingly looking to digitise and add value to existing content and information, and established institutions are looking to make more of their content and information more accessible. This session will identify new ways of digitising content, the extent to which dividing lines between commercial and public content are blurring, the kinds of digital content that are coming to the market and into wider use, and the issues raised in terms of access by potential new content distributors and how established institutions that have not been sources of digital content are tackling the issues of increasing the accessibility of their content.

Key questions to be addressed are:

- What new distribution mechanisms exist and which ones are proving most successful for new entrants (intermediaries), and for established institutions (archives, museums)?
- What are the major challenges in improving access to content and knowledge (e.g. adding value, distributing content, providing access) while respecting intellectual property?
- What are the roles and obligations of public institutions (broadcasters, libraries, archives) in making their material accessible for free public and/or commercial access, and what is the role of commercial digitisation and under what conditions?

## **Session 7: Are digital media and the Internet changing creative supply?**

New and different ways of creating, distributing and accessing content can affect creativity by: opening up new commercial and non-commercial content creation and distribution channels and expanding markets and uses in ways that favour creativity. The Internet potentially provides many opportunities for creativity and interaction between creators, users and consumers, by lowering barriers to entry and driving down creation and distribution costs, expanding the scope of distribution, increasing specialisation and reaching niche markets, and lowering access costs for users. Major questions revolve around whether the potential for lower-cost creation and distribution is leading to greater creativity and easier distribution, the extent to which brand image and name have increased in importance due to network effects and whether there have been changes in the roles of intermediaries in content creation and distribution. This session will

focus on the creative tensions between content creators and artists and the potential for new low-cost content creation, distribution and access to digital content.

Key questions to be addressed are:

- From the point of view of content creators and artists are there increasing opportunities to reach commercial markets and non-commercial users?
- Is this increasing creativity in established and new content areas?
- How are competitive conditions changing the structure on the content supply side? What is the emerging balance between greater access and returns to content creation?
- How does this vary across different content areas (audio, video, entertainment, literature)?

## **Parallel Sessions 8: Business and policy solutions: Emerging issues and implications**

### **Session 8A: Business and policy solutions. Content creation. Building the right environment for innovation**

This session will focus on the features of the environment that encourages content creation and innovation, and the roles of business and government in creating this environment.

Key questions to be addressed are:

- Can creative communities and environments be fostered, and if so how? What is the balance between fostering the creative environment in general and for particular content industries (music, film, games, new content), and can enduring local creativity be fostered in highly globalised industries? What are the challenges for public policy?
- What are the requirements for R&D, innovation and technology, education and skills in different content areas and who supplies them?
- Are there specific venture capital, business start-up and expansion issues to be addressed?
- What value chain and business model issues need attention (non-discriminatory policy frameworks, competition issues, technology neutrality and consistent platform-neutral treatment of content)? What are the policy implications of platform convergence for content creation?

### **Session 8B: Content diffusion – IPR, DRM, licensing, content security, standards**

This session will focus on business and policy solutions and challenges to diffusing content (including new kinds of content), and adapting business models, while protecting intellectual property. A starting point is the OECD Council Recommendation on Broadband Development that Member countries should implement regulatory frameworks that balance the interests of suppliers and users, in areas such as the protection of intellectual property rights and digital rights management without disadvantaging innovative e-business models.

Key questions to be addressed are:

- What are the outlooks of content suppliers, distributors, consumers and users and are there particular obstacles to commercial and non-commercial digital delivery?
- How are new distribution channels affecting established content protection mechanisms?
- How well are established systems of intellectual property protection working in the new content distribution environment (including user-created content), and are new forms of licensing developing for the global Internet?
- What are opportunities and challenges of DRM for suppliers, distributors and users?
- Are there standards (e.g. content interoperability, payments), which need special attention?

### **Session 9: Identifying priority issues, tools and policy challenges: moving forward**

This session will discuss and pull together the main policy themes and set out business and policy priorities. It will build on the themes laid out in previous sessions covering creativity, value chains and business models, new content and platform development, new user demands and access routes, the interaction between creative supply, digital rights and digital media/the Internet, and push them forward by identifying business and policy solutions that encourage creation, development and use of digital content. Presentations and discussion will focus on identifying the key issues for business and government in developing appropriate frameworks for creativity, distribution and access to digital content. Issues range from the impacts of broadband rollout and content platform convergence, through content creation and individual sector developments, but all should be forward-looking in terms of current and emerging challenges for digital content and how to tackle them. The overall aim is to look forward to new issues and challenges that need to be addressed and the role of business, government and international organizations.

### **Conference conclusions: Rapporteurs**

During this session, the Rapporteurs will present and analyse the conference conclusions.

### **Closing Remarks**

Closing remarks will be presented by FCC Commissioner Copps, OECD Secretary General Johnston and Minister Stanca.