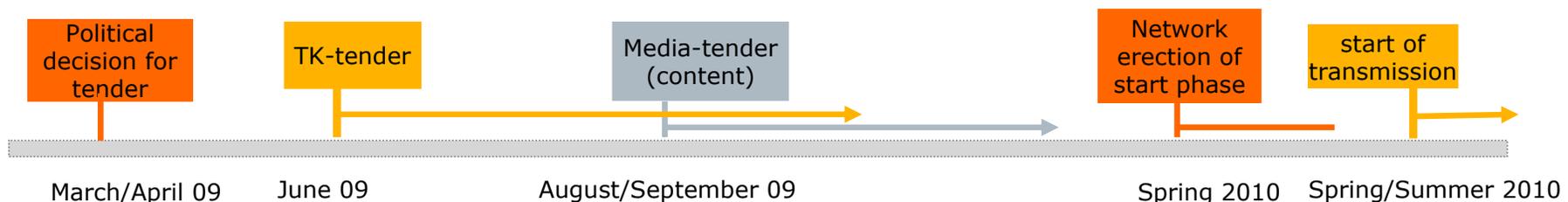


- Public broadcaster applied with one voice for additional funding for digital radio at KEF – high level of commitment, flanked by press releases and statements
- But: agreement between KEF and ARD is still pending and causes delays in decisions on regional level; next meeting between KEF & ARD end of May
- Private broadcasters are split up: Within VPRT (association of bigger broadcasters) a majority seems to be against launch, within APR (association of smaller broadcasters) the majority is at least not working against the relaunch, some are even in favor
- Tender for nationwide digital radio multiplex will be given in summer 2009
- New timeline (expectation):



Public Broadcaster:

- ARD and Deutschlandradio showed high commitment
- still no funding by KEF (ARD 30 Mio, DR 12 Mio. € pending)
- KEF: collaboration between private and public broadcasters requested
- ARD wants complete own MUX on regional level
- Deutschlandradio wants 1/3 of national MUX

Private Broadcaster:

- 1 Private Broadcaster is more than willing and has good content, but has financial issues
- Majority of big broadcasters are not convinced
- Medium-sized stations are interested, but question of funding also open



Regardless, media authorities forwarded the tender for the national MUX to the BNetzA, who is obliged to publish the tender

National Multiplex:

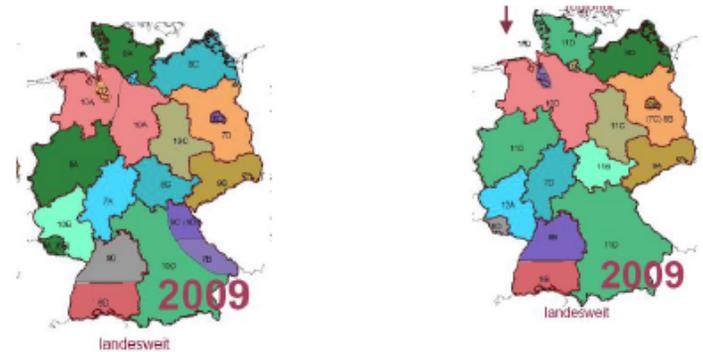
- 1/3 utilization by Deutschlandradio
- 2/3 available to private radio
(10 (?) channels + data)

Laenderwide Multiplex

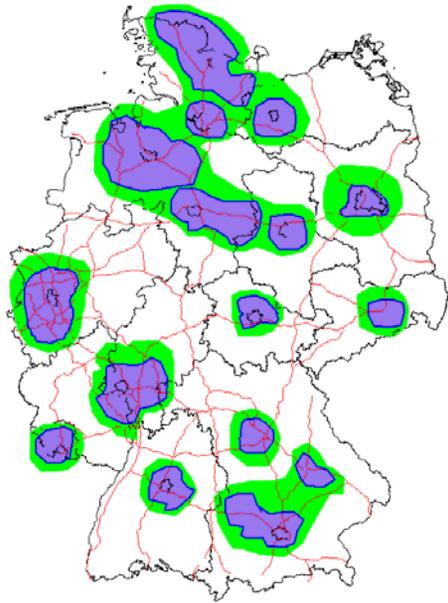
- ARD wants to operate one laender-MUX on their own
- Laenderwide MUX by private radios varies from impossible/difficult/subsidized/most likely
- If ARD considers mixed laender-wide MUX, utilization problems drop significantly

Regional/local Multiplex

- No reliable information about local demand available
- Expectation: utilization in metropolitan areas with special offers for local radios should be sufficient

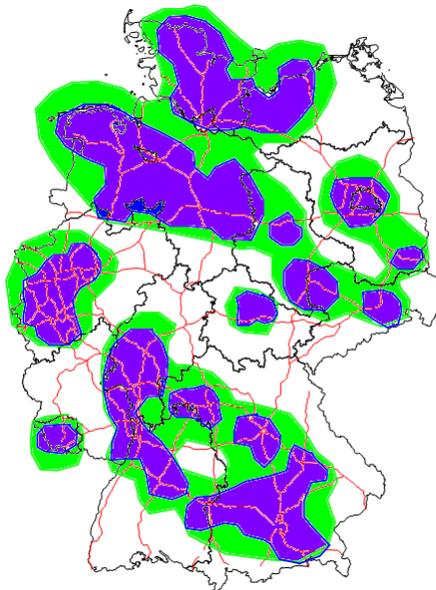


Have in mind: the existing CH12-DAB-network still covers 75% of the German area!



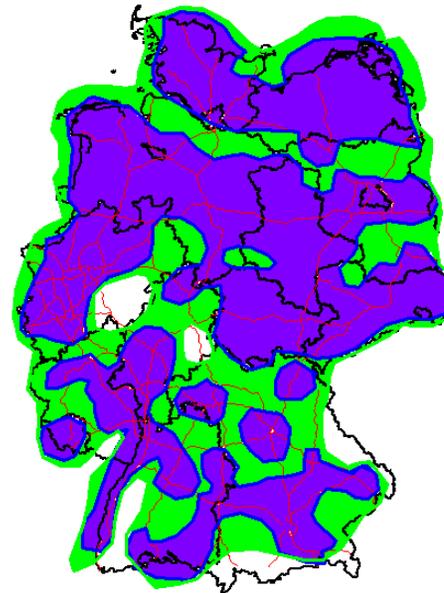
Startszenario

30 Mio. EW bzw.
40% der Bevölkerung
≈ 30-35 Sender



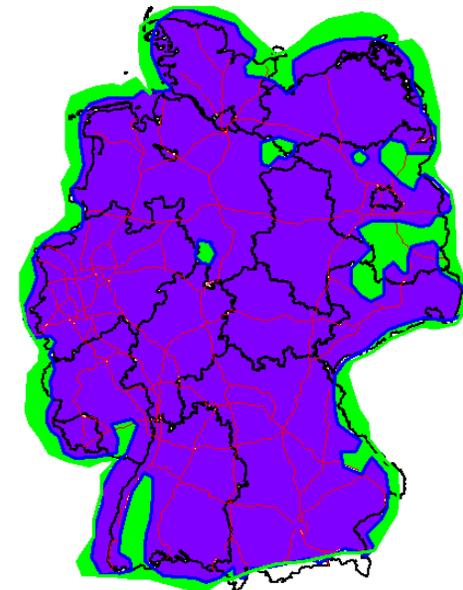
Phase 2

40 Mio. EW bzw.
50% der Bevölkerung
≈ 50 Sender



Phase 3

57 Mio. EW bzw.
70% der Bevölkerung
≈ 115 Sender



Phase 4

70 Mio. EW bzw.
85% der Bevölkerung
≈ 170 Sender

grüne Konturen: Mobilversorgung, blaue Konturen: Portabel-Indoor-Versorgung

- 1. Clear political guidance and willingness to force the migration from analogue to digital radio**
- 2. A legal and regulatory framework minimizing the economic risks of all players involved and securing the strategic planning.**
- 3. Development of a clear European strategy to digitalize radio and by this to secure the all over availability of a unified powerful telematic service distribution platform**