OVAB Out-of-home Video Advertising Bureau Europe

WWW.INVIDIS.DE

invidis CONSULTING

Munich Conference 2011

5th Munich
DIGITAL SIGNAGE CONFERENCE

Managing Growth – Digital Signage beyond the tipping point

CONTENT: At a glance – The programme of the conference
Who is who – Overview of all speakers

THANKS TO ALL OUR SPONSORS!

OVAB | Out-of-home Video Advertising Bureau Europe

LG Life's Good

NEC

SAMSUNG TURN ON TOMORROW

ComQi

AUS GUTEM GRUND GRUNDIG

InfoGate

ViewSonic

DynaScan

Alcatel·Lucent

CONCEPT INTERNATIONAL GMBH

congatec the rhythm of embedded computing

stinova

TRIDELITY DISPLAY SOLUTIONS

INGRAM MICRO

THANKS TO OUR MEDIA PARTNERS!

DIGITAL OUT OF HOME cleverdis Your Business Networking Catalyst

DailyDOOH.com

digital signage

INHALT

Beyond the tipping point:
The results of the first ranking of the German speaking digital signage market – page 4

On growth course:
The success of the German speaking DooH market – page 8

At a glance:
The programme of the conference – page 10

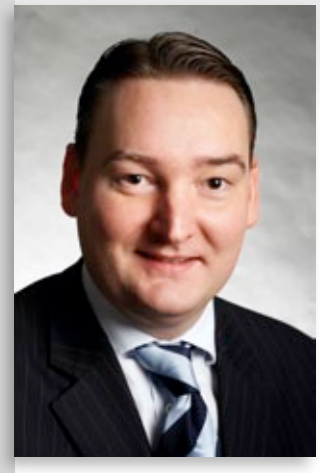
Who is who:
Overview of all the speakers – page 12

Dear Readers,

I would like to welcome you in the name of invidis consulting and OVAB Europe to the 5th Munich Digital Signage Conference 2011. This year, I am very pleased to tell you that the German speaking digital signage market managed to reach the tipping point. Although the market is now on a straight growth course, many businesses are facing new challenges. "Managing growth" is a new task and not as easy as it seems. All market players can learn from successful projects and companies how to keep a stable growth over many years. We are looking forward to the strategies and solutions that our this year's speakers will contribute. And we are sure you will enjoy the discussions and the communication among the visitors.

Enjoy the conference. Yours,

Florian Rotberg
Managing Director invidis consulting



Dear Readers,

the first half of the year has come to an end and has been very successful for our industry. It seems that we are now facing the much anticipated breakthrough. Large networks have been rolled out, brand manufacturer experience the medium as flexible and very effective. Media agencies are increasingly integrating digital out of home into their media plans.

Anyway, we should not forget that – compared to other media – dooh has still a very low market share which we have to increase. Standards in term of media currency, measurement and along with this comparability are still open issues. The internet and mobile advertising showed us, how standardization can increase media sales and switch budgets from other media.

Therefore, for the second time in a row standardization is a central theme of this year's OVAB conference. I would be very delighted, if all attending companies would work together for the good of the whole industry. I wish you a great conference and inspiring talks with colleagues from the dooh industry.

Yours,

Dirk Hülsermann
Founding President and Chairman OVAB Europe

Imprint

Publisher:
invidis consulting GmbH
Rosenheimer Str. 145e,
81671 München

Managing Director:
Florian Rotberg

Editorial staff:
Florian Rotberg, Stefanie Schömann-Finck, Oliver Schwede

Layout:
Frank Müller Medienproduktionen, München

Cover:
©fotolia.com, kamaga

©2011 invidis consulting GmbH München

www.invidis.de

„digital signage market top spot 2011“

Digital signage: A must-have

The German speaking digital signage market managed to reach the tipping point and is aiming for the European top spot in 2011

A solid demand for digital signage services in a very friendly economic environment enabled the industry to reach new heights in 2010. With a growth rate of more than 20 percent digital signage has evolved from a nice-to-have service to a must-have in selected industries. The market exceeded the 300 million Euro mark and reached approximately 330 million Euro in 2010.

One of the largest digital signage projects launched 2010 was Ströer Infoscreens Out of Home Channel. Germany's leading outdoor advertiser announced the first nationwide Outdoor Channel (OC). Ströer OC will be installed across the 200 main railway stations in Germany till the end of 2011. The network currently includes 757 totems with 243 more to go till December. Screen size is 60 and 70 inches.

Another important project was initiated by the private equity owned operator of Germany's highway service areas. Tank & Rast requested a proposal for purchase for a retail digital signage network across their 340 service areas and fuel stations. In contrast to Ströer's OC Tank & Rast is focusing on medium sized displays and small displays in the shelves. The contract has been awarded to Hamburg based ISS and Scala software.

Germany's second largest dooh operator Deutsche Telekom has continuously expanded their dooh networks across most German airports and established two retail networks in food retail (Rewe Rhein-Main) and lottery outlets across three federal states.

The majority of displays and licenses sold has been installed in smaller projects or in network expansions, upgrades etc. Large scale replacement business of end-of-life networks hasn't played a role last year. But we expect a growing number of networks being refreshed with new hardware in 2011 and 2012.

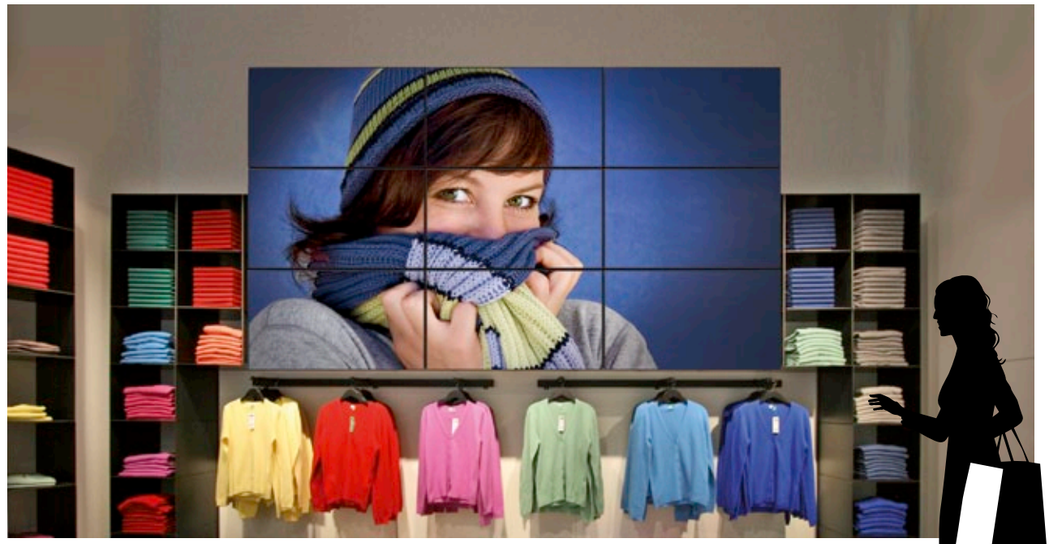
The display market is generally the main indicator in the digital signage industry. No digital signage without a display. But what kind of screens have been installed in projects between the North Sea and the Alps? Almost 50 000 professional large format LCD and Plasma displays were sold in 2010. Applying the digital signage rule of thumb "two consumer displays are installed for each professional screen sold" would bring the number of installed digital signage units to approximately 150 000. Invidis challenges the 2:1 ratio and forecast roughly 130 000 displays (PD + CE) used for digital signage in Germany, Austria and Switzerland. Projectors are only a niche product in digital signage projects.

Display output grew by a quarter while average prices dropped by more than 25 percent. In total the market for professional large format displays accounted for approximately 100 million Euro. Leading the industry are NEC and Samsung capturing more than 60 percent of the total large format market.

The top integrators drove the market with unseen power. Xplace and Seen Media both doubled their digital signage revenues to close to ten million Euro each. Integrators have captured a considerable share of the software adoption business from digital signage software vendors. The integrators were able to materialize their sector know how by offering customized solutions. Xplace is very strong in electronics retail (MSH - Saturn, Media Markt), Seen Media focuses on automotive (Audi), Quick Service Restaurants (Burger King) and different retail sectors, Nordland systems is specialized in retail fueling and tobacco while Telekom delivers across all sectors.

It is particularly noticeable that the top independent integrators have grown financially very solid in 2010. They are now able to finance medium sized rollouts by themselves. The financial power of global general contractors like IBM, HP etc. is only necessary for projects larger than two million Euros.

The top loosers in the digital signage value chain have been the more than 130 digital signage software vendors. Software revenues dropped from more than 20 percent to approximately single digit in the last four years. Only



ERWEITERN SIE IHRE MÖGLICHKEITEN

Die neuen Samsung LED Large Format Displays eröffnen Handelsunternehmen flexible und innovative Möglichkeiten zur perfekten Wareninszenierung.

Optimal für den Einsatz in allen Handelsbranchen

Mit gleich vier neuen Serien erweitert Samsung sein Portfolio an Large Format Displays (LFD) um professionelle LED-Lösungen für jeden Einsatzzweck. Ob als Einzeldisplay oder in einer Videowand – mit ihrer erstklassigen Bildqualität, der extrem schlanken und leichten Bauweise sowie ihrer Langlebigkeit und Kosteneffizienz setzen die Samsung LED LFDs neue Maßstäbe für Ihre Kommunikation.

Brilliante HD-Auflösung dank leuchtstarkem DID Panel

Moderne LED Backlight-Technologie ermöglicht tolle Produktdarstellungen mit großer Farbvielfalt. Die neuen LED Large Format Displays bieten Ihnen eine einfache Zuspielung und Wartung dank integrierbarem PC-Modul und 3 Jahren Garantie mit Vor-Ort-Service. Die speziellen Videowandhalterungen (UD, UE) bzw. VESA-Kompatibilität machen die Montage zum Kinderspiel.

Ultraschmale Rahmen – Die SyncMaster UD Serie

Die Premium-Displays der UD Serie bestechen vor allem durch ihre ultraschmale Rahmenbreite, was die Bildübergänge auf einer Videowand nahezu unsichtbar macht. Damit werden großdimensionale Warenpräsentationen mit ungeteilter Aufmerksamkeit ermöglicht. Dank Direct-LED, also ganzflächiger Hintergrundbeleuchtung, werden zudem eine sehr homogene Bildausleuchtung und verbesserte Kontrastwerte erreicht. Die UD-Serie ist zudem für den 24/7-Dauerbetrieb geeignet.

Serie	HE	ME	UE	UD
Modell SyncMaster	HE40A / HE46A LED	ME40A / ME46A / ME55A LED	UE46A / UE55A LED	UD55A LED
Bildschirmgrößen	101,6 cm (40") / 116,84 cm (46")	101,6 cm (40") / 116,84 cm (46") / 138,68 cm (55")	116,84 cm (46") / 138,68 cm (55")	138,68 cm (55")
Besonderheiten	HDTV-Tuner, 4x HDMI-Anschluss, Mediaplayer (via USB), Lautsprecher	DVI Loop Out Anschluss, Mediaplayer (via USB), MagicInfo Lite Player (via Netzwerk), Lautsprecher	240Hz Panel, nur 5,2 mm Rahmenbreite, Mediaplayer (via USB), MagicInfo Lite Player (via Netzwerk), Lautsprecher	Direct LED Backlight, DID Panel, geeignet für Dauerbetrieb, vorbereitet für PC-Modul (SBB-A), umfassende Anschlussmöglichkeiten
UVP	1.299 € / 1.799 €	1.599 € / 1.999 € / 3.600 €	2.949 € / 3.799 €	7.598 €
Anwendungsbeispiel	Sportbars dank HDTV-Tuner	Point of Sale	Fashion-Stores zum Abspielen von Musikvideos	Video-Wall am Point of Information

Mehr Informationen zu Samsung Large Format Displays finden Sie unter **www.samsung.de**

SAMSUNG

TURN ON TOMORROW

„digital signage market top shot 2011"

Scala and Grassfish recorded revenues of more than one million Euro in the German speaking market. Both vendors can rely on an established partner ecosystem and manage more than 10 000 active licenses in the market (active licenses: recurrent or one-time revenues in 2010).

The majority of software vendors are small players with not more than a couple of hundred active licenses and a handful of outsourced software developers in Eastern Europe, Russia or the Indian subcontinent. The direct sales only business model limits growth for these small market players and will eventually lead to elimination of a large number of vendors. This process has already started and is accelerated by a strong shift from a license business to a service and solution offering.

We expect that the very heterogeneous software market will be reduced to five major software players and a couple of sector specialists.

Digital signage markets across the globe are still dominated by national players. The only exceptions are the very capital intensive display business dominated by Japanese, South Korean and Taiwanese companies and roll out services i.e. Black Box.

Integrators, software vendors (with the exception of Scala) and obviously content providers are in general domestic players. These players are increasingly challenged by international digital signage end-to-end providers. The main focus lies on cross border deals of multinationals. But international installations are still very rare and local knowledge is very important.

But the market will continue to develop in an international direction. European and intercontinental players are increasingly entering the German speaking market and they will try gain market share. Currently the market is still in excellent shape and is forecasted to continue to grow again more than 30 percent to 450 to 500 million Euro in 2011. The major driver was the Digital out of Home market which grew 38 percent in 2010.

TOP 15 Integrator in DE / AT / CH	Country	Revenues 2010 (in Euro)	Remarks
Telekom Deutschland / T-Systems	DE	> 20 Mio	estimated – T-Systems Telekom Deutschland are not allowed to report any division results
xplace	DE	5 – 10 Mio	reported
Seen Media	DE	5 – 10 Mio	reported
ICT AG	DE	5 – 10 Mio	estimated – without any AV installation revenues
Multivision	DE	5 – 10 Mio	estimated – without any AV installation revenues
John Lay Solutions	CH	5 – 10 Mio	estimated – without any AV installation revenues
netvico	DE	2 – 5 Mio	reported
Heineking Media	DE	2 – 5 Mio	estimated – specialized in digital information systems for schools (more than 7000 installations)
Nordland systems	DE	2 – 5 Mio	reported
ipos24	DE	2 – 5 Mio	estimated – specialized in the car rental market (Europa u.a. Avis, Europcar, Hertz)
Viewento	DE	2 – 5 Mio	estimated – mostly food retail installations
DIME (former SDI)	DE	2 – 5 Mio	reported
Kapsch	AT	2 – 5 Mio	reported
feratel	AT	2 – 5 Mio	estimated – specialized in tourist information systems
Kilchenmann	CH	2 – 5 Mio	estimated

The Digital Signage business in Germany is lead by the integrator. They will become even more important in the future as they expand their footprint in the overall value chain

ZUVERLÄSSIGKEIT UND INNOVATIONSGEIST
FÜR IHRE DIGITAL SIGNAGE LÖSUNGEN

Digital Signage Lösungen sollen Ihren Kunden einen Mehrwert an Informationen bieten. Dazu bedarf es nicht nur überzeugender Inhalte, sondern auch geeigneter Displays für den professionellen Einsatz in Ihrem Unternehmen.

Ob Speziallösungen wie Streched-Displays oder einfach nur ein kostengünstiges Public Display für den 24/7-Einsatz. Bei LG stehen Ihnen alle Möglichkeiten für eine überzeugende Produktpräsentation offen.

Beginnend mit einer Bilddiagonale von 94cm (37") für kleinere Flächen bis hin zu 165cm (65") großen Displays stellt Ihnen LG die passende Hardware zu Seite.

Insbesondere durch den Einsatz der Shine-out Technik eignen sich Modelle wie 47WV30 und M4224F für den Einsatz bei direkter Sonneneinstrahlung.

LG
Life's Good

Digital out of Home gets serious

The German speaking DooH market is experiencing a great deal of excitement, but establishing standards is still an important buildung block

The German speaking digital out of home market has lagged behind other West European markets for many years. This has changed in recent months considerably. DooH based advertising revenues rose by 38 percent from 67 million Euro in 2009 to 92 million in 2010. And this has only been the beginning: The first half of 2011 shows even a higher growth rate of 40 to 50 percent. Digital out of home has still a small market share compared to other media, but thanks to above average growth rates DooH 2010 recorded one of the fastest growing media — only second to mobile advertising.

Our fall 2011 invidis DooH ranking lists more than 100 000 installed displays for Germany, Austria and Switzerland — 90 percent of them in Germany and the rest evenly spread between the two alpine nations.

Most noticable developments in the last twelve months were the rollouts of national networks. One of the biggest challenges in the industry is to create networks with national reach. In large markets like the UK and France this task is similar difficult – even though their centralistic economies are based in the capital regions of Paris and London respectively. National reach of DooH networks in geographically much smaller markets like the Netherland, Switzerland or Austria have been up and running for some time already.

- Ströer Infoscreen is currently on the way to roll out the last of the 1 000 digital posters at 200 major railway stations across Germany. No doubt a double digit million Euros invest taking into account that the 1 000 displays are 60 to 70 inch installed in semi-outdoor totems
- *The German autobahn service provider Tank & Rast has installed nationwide 3 000 digital displays across 600 locations this summer*
- *Deutsche Telekom out of Home Media has proved what a daunting task food retail rollouts can be. Rewe TV – a network of 3 000 displays – has been rolled out in only three of the 16 federal states*
- *Another attractive network is Telekom's airport network covering almost all airports except Frankfurt/Main.*
- *Hamburg based mall media market leader ECE flatmedia will reach the 1 000 display mark in fall 2011. The network covers almost 50 malls and ranks as Europe's leading premium mall signage network*
- *Electronic retail giant Media Saturn started to market their more than 50 000 TV's showcased in their hundreds of retail outlets across Germany. A solid business case as investments in displays are very limited to a few hundred displays i.e. in the check-out zones*
- *CityUp is looking at a different concept. The Bonn based newcomer builds a network of 800 shop window displays along popular high street locations. Connecting the regional cluster CityUp plans to market a national reach till the end of the year*

Invidis research shows a lot of open issues regarding standards and measurement. Network operators are very open in communicating number of displays, locations and gross reach. But it remains a secret on which base gross reach numbers have been collected.

OVAB Europe and some of the leading digital out of home networks have teamed up to standardize research. Next results will be discussed with the industry at the 5th OVAB Munich Digital Signage Conference 14 – 16 September 2011. Common standards will eventually simplify the media buying process by comparing, mix and match and book DooH networks.

Other networks are focusing on dwell time. TV Wartezimmer broadcasts to more than 5 000 displays in doctors waiting rooms with an average dwell time of 45 minutes.

DooH overtakes cinema advertising in 2011

LED boards in public spaces will remain exotic in the German DooH media landscape. Most cities do not allow outdoor LED Boards for architectural and safety reasons. Berlin is an exception where WallDecaux is currently rolling out 20 large format LED boards. But content is limited to still images and the size of the boards does not exceed 18/1 poster size. Very far away from London standards where LED boards stretch a couple dozen meters at major roundabouts.

Today the German speaking DooH market are experiencing a great deal of excitement. As the markets mature concepts, networks and media sales will keep adapting to market demand. Establishing standards is an important building block, gaining market share another. DooH is on track to overtake cinema advertising in 2011 and exceed the ten percent share of Out of Home.

© Fotolia, kamaga

15th of September 2011*

15th of September 2011*

	Strategy *(simultaneous translation available)*	Campaigns	Proof of Concept	Workshops	
09:00 – 10:00	"Key Note: Managing Growth – strategic views on the Digital Signage and Digital out of Home market" **invidis consulting GmbH,** Florian Rotberg / Oliver Schwede				09:00 – 10:00
10:00 – 10:30	*Coffee Break*				10:00 – 10:30
10:30 – 11:00	"Services for media planner – an introduction to NECs European VUKUNET strategy" **NEC Display Solutions Europe GmbH,** Dirk Hülsermann		"kompas info in den Oldenburger Schlosshöfen – Kundeninformation und Wegeleitung" (DE) **dimedis GmbH,** Wilhelm Halling	*Interactive Communication and Presentation Solutions* "From Digital Signage to Innovative Office Solutions" > Dr. Werner König **(ict AG)** > Oliver Mack **(ict AG)** > Stefan Schönfeld **(ict AG)**	10:30 – 12:00
11:00 – 11:30	"Setting up one of Europe's largest retail DooH networks in Germany" **Telekom out of Home Media,** Michael Pier	"Digital branding: a conceptual framework for interactive consumer experiences" (DE) **People Interactive GmbH,** Dr. Tillman Bardt	"Premier League Stadiums – How to build and manage a large Digital Signage network?" (EN) **ComQi, Ronni Guggenheim**		
11:30 – 12:00	"Panel discussion with OVAB Europe and dpaa" **DOOH Panel,** Dirk Hülsermann and Brian Dusho	Visual Art Germany Thorsten Wien	"Carbrowser – Turnkey Lösung für alle Autohäuser" (DE) **memedia GbR,** Swen Topp		
12:00 – 13:00	*Lunch Break*				12:00 – 13:00
13:00 – 13:30	"SWOT-Analysis of the German DOOH market" **ECE flatmedia,** Oliver Poppelbaum	"Der Stellenwert des Konzeptes im Digital Signage Projekt" (DE) **echion AG,** Michael Kimmich	"Media-Jalousi – ein neuer Ansatz für Medien-Fassaden" (DE) **Mediabiose GmbH,** Mariana Yordanova	*Multisensoric Communciation* „Touch and Gesture Control at the Point of Sales" > Ralf Kluth **(Sovato)** > Clemens Lutsch (Microsoft Deutschland) > Sven Schneider **(Expectare)** > Wolfgang Herfurtner **(Evoluce AG)**	13:00 – 15:10
13:30 – 14:00	"Mergers and acquisitions – a way to grow in the digital signage industry – a Scandinavian perspective" **Mermaid A/S,** Nico Colijn	Cheil Germany GmbH Volker Selle	"Pay per look – measuring and billing digital signage campaigns" (EN) **Ayuda Media Systems,** Andreas Soupliotis		
14:00 – 14:40	"Neue Vertriebswege: Sales Strategien für den IT-Channel" **Cittadino GmbH,** Stefan Tiefenthal / Ulrich Kemp	Evisco AG – The Electronic Vision Company Jürgen Hausmann	komma,tec redaction GmbH Fabian Scholz		
14:40 – 15:10	"Strategic investments: opportunities, market drivers and realities" **Wellington Partners,** Frank Böhnke	"Contboxx – der erste Content-Store für Digital Signage" (DE) **Adversign Media GmbH,** Albert Roelen	"Product selector for the PoS – Arcelik product selector" (EN) **KocSistem A.S.,** Can Barış Öztok	„Der Digital Signage Software-Markt - eine qualitative Bewertung" (DE) **PrimeConsult,** K.J Veigel	
15:10 – 16:00	*Coffee Break*				15:10 – 16:00
16:00 – 16:30	"Delivering Digital Signage – market perspective form an ICT-provider" **Kapsch BusinssCom AG,** Thomas Neumeister	"DOOH rating – mobile measurement for winning TV budgets" (EN) **MeterLive Ltd.,** Michael Mumcuoglu	"Augmented Reality – Ein Trend für Digital Signage Systeme?" (DE) **metaio GmbH,** Mark Weisbrod	„The 3D Value Chain – from Production to Playout" (Tridelity) > **An Introduction to Autostereoscopic Display Technology** – Michael Russo **(Tridelity)** > **Content Creation – how to get the 3D?** – Rainer Duda > **3D Content Management – Demo on Tri-CMS** – Marco Lopes **(Tridelity)** > **Products, References & Trends** – Michael Russo **(Tridelity)**	16:00 – 17:45
16:30 – 17:00	"Samsonite campaign on the new Infoscreen outdoor channel" **Samsonite, Dirk Schmidinger**	"Infogate – a new service which improves airport service offerings and reduces operational costs" (EN) **Flughafen München GmbH,** Manfred Zötl	"Operation and Service Concepts for professional DooH Networks" **Alcatel-Lucent Deutschland AG / CityUp GmbH,** Thomas Strauss & Helga Ebel-Gerlach		
17:00 – 17:45	"Digital screens in a luxury retail retail environment" **Harrods, Guy Cheston / Harris DOOH, Denise MacDonell**				
17:45 – 18:15	"The Digital Signage and Digital out of Home industry in Europe: a conclusion and perspective" **DailyDOOH,** Adrian Cotterill				17:45 – 18:15
19:00 – 00:00	*Network Event at the Airbräu Restaurant*				19:00 – 00:00

16th of September 2011

16th of September 2011*

	OVAB Europe	Content Day	
09:00 – 12:00	OVAB Europe Standards Workshop	BlueFox Content Day	09:00 – 15:00
13:00 – 15:00	OVAB Europe Annual Membership Meeting		

© xxxxxxxxxxxxxxxxxxxx

*** As at: September 6th 2011**

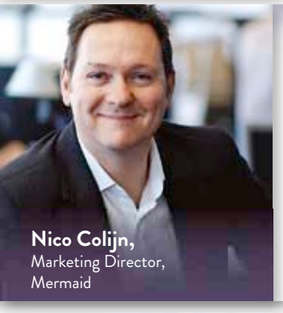
We would like to thank all our speakers for their contributions to our conference!

Guy Cheston,
Media Sales Director,
Harrods

Established in 1849, Harrods is one of the largest retailers worldwide. Home to 330 different departments and occupying 1 million square feet of selling space, the landmark store welcomes an exquisite clientele of 15 million customers per year from around the world. Harrods prides itself on a reputation for excellence. Built on a heritage of providing an unprecedented service, Harrods satisfies and exceeds the expectations of its customers, whilst showcasing the world's finest luxury brands in the most captivating environment. At Harrods, anything is possible.

HARRODS | MEDIA

Contact details:
Guy Cheston
Harrods
Phone+44 (0)20 7225 5706
Mail: Guy.Cheston@harrods.com
www.harrods-media.com



Nico Colijn,
Marketing Director,
Mermaid

Mermaid is Scandinavia's leading supplier of digital signage, with offices in Denmark, Norway and Sweden. We have implemented solutions in more than 30 countries. We offer a broad range of products and services for the retail industry, transport and the corporate and public sectors.

MERMAID
DEDICATED TO DIGITAL SIGNAGE

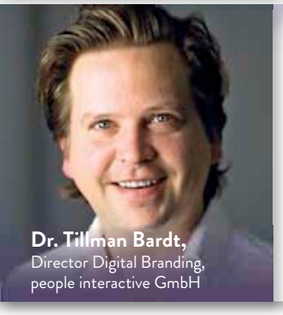
Contact details:
Nico Colijn
Mermaid
Phone: +45 87 54 28 86
Mail: nc@mermaid.dk
www.mermaid.dk

Adrian Cotterill,
Editor in chief of
DailyDOOH

DailyDOOH is recognised as the leading, independent, impartial, international source of information for the Digital Out of Home industry and focuses exclusively on industry analysis and market research in Digital Signage and Digital Out of Home. DailyDOOH.com is put together by a small team of industry analysts and researchers together with international contributors.

DailyDOOH.com

Contact details:
Andrew Neale
DailyDOOH
Phone: +44 7092 276204
Mail: ahneale@dailydooh.com
www.dailydooh.com



Dr. Tillman Bardt,
Director Digital Branding,
people interactive GmbH

People interactive stands for the development of interactive brand experiences for digital media. Since 1999 the Cologne-based agency has developed digital cross-media communication solutions for brands, products and companies, turning viewers into admirers.

people **interactive**

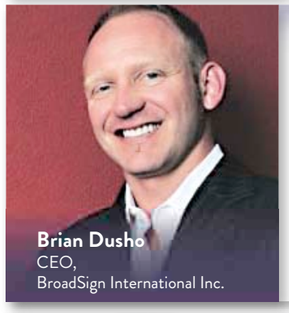
Contact details:
Dr. Tillman Bardt
people interactive GmbH
Phone: 0221-569773-53
Mail: t.bardt@people-interactive.de
www.people-interactive.de

Frank Böhnke,
General Partner,
Wellington Partners

Wellington Partners is one of the most successful pan-European venture capital firms. With some € 800 million under management and offices in London, Munich, Palo Alto and Zurich, the firm invests into companies throughout Europe that have the potential to become global leaders, in the areas of Digital Media, Cleantech, Electronics, Software and Life Sciences. Since 1998, Wellington Partners has invested in more than 100 European companies, including now publicly traded Actelion and XING and privately held companies like Adconion, Alando, Ciao, ComQi, Livebookings, Qype, and Spotify.

wellingtonpartners VENTURE CAPITAL

Contact details:
Svjetlana Seibold
Wellington Partners
Phone +49 (0) 89 21 99 41 40
Mail: seibold@wellington-partners.com
www.wellington-partners.com



Brian Dusho
CEO,
BroadSign International Inc.

BroadSign International Inc. is the worldwide provider of the premier software platform for digital signage networks. The software enables operators to target out-of-home audiences, sell ad space, reliably play back scheduled content on each screen, and account for campaign performance.

BroadSign

Contact details:
Brian Dusho
BroadSign International Inc.
Phone: 1-514-399-1184
Mail: brian.dusho@broadsign.com
www.broadsign.com

Ronni Guggenheim,
President,
ComQi

ComQi is a global leader in multichannel message management in the digital signage and out-of-home industries, providing powerful content & network management platform along with innovative media distribution technologies. Born from the merger of Minicom Digital Signage and EnQii, ComQi has offices in New York, Jerusalem, Zurich, Toronto, Hong Kong and London, with 400,000 screen displays powered in various market verticals throughout the world. ComQi has been voted as the number one global digital signage provider for the third year in a row by DailyDOOH and a Tier One player by Frost & Sullivan for the second year in a row.

ComQi

Contact details:
André Koitzsch
ComQi
Phone: +41 44 823 8007 or
+49 69 577 08 943
Mail: andre.koitzsch@comqi.com
www.comqi.com

Wilhelm Halling,
Managing Director,
dimedis GmbH

dimedis stands for digital media distribution. The software house specializes in solutions for trade fairs, events and Digital Signage. kompas® runs one of the largest nationwide Digital Signage networks in Germany with more than 2000 active displays.

dimedis

Contact details:
Dipl.-Ing. Wilhelm Halling
dimedis GmbH
Phone: +49-221-921260-0
Mail: whalling@dimedis.de
www.dimedis.de

Wolfgang Herfurtner,
Vorstand/CEO,
Evoluce AG

Software for Natural User Interfaces
Evoluce software enables gesture control computing with a natural user experience. The power of 3D depth-sensing technologies in combination with intelligent software lead to direct and intuitive interfaces. They open the door to a myriad of possibilities to interact with a huge variety of applications in gaming, consumer electronics, office, education, point of sale and medical systems. The latest generation of Evoluce large format displays offers true multi-touch and precise gesture control performance. A worldwide network of software and hardware partners benefit from professional custom software development for 3D-sensing applications.

EVOLUCE

Contact details:
Wolfgang Herfurtner
Evoluce AG
Phone: +49 (0)811 - 99 81 96 - 0
Mail: w.herfurtner@evoluce.com
www.evoluce.com

Dirk Hülsermann,
Manager
DOOH Solutions

NEC Display Solutions is one of the world`s leading manufacturers offering the widest product range of display and projector solutions. As the innovation and market leader in the field of digital signage, NEC Display Solutions supplies the central components of digital signage systems. An excellent understanding of the market and the industry, coupled with state-of-the-art technology, result in customised products and solutions with high levels of failure safety, intuitive operation and low total system costs for all areas of application.

Contact details:
Dirk Hülsermann
NEC Display Solutions Europe GmbH
Phone: +49 89 99699 -0/-548
Mail: dirk.huelsermann@nec-displays.com
www.nec-display-solutions.com

Ulrich Kemp,
Sales Director,
Cittadino GmbH

Cittadino is a full service agent for digital signage. Cittadino offers hard- and software solutions as well as content productions directed at specific target groups. Cittadino developed picturemachine® – a modular software for the production, distribution and monitoring of multimedia content.

Contact details:
Franz Josef Medam
Cittadino GmbH
Phone: +49 (0)211 902 95 24
Mail:franz.josef.medam@cittadino.de
www.cittadino.de

Micheal Kimmich,
CEO,
echion AG

echion AG focuses on concepts and implementation of individual instore media for retail chains' brands which are demonstrably most intensively experienced by members of the public, inundated with incentives on a daily basis: instore radio, digital signage and a combination of the both.

Contact details:
Michael Kimmich
echion Corporate Communication AG
Phone: +49 (0)821 - 650 70 2-0
Mail: info@echion.de
www.echion.de

Ralf Kluth,
Retail Trendscout,
Sovato GmbH

Digital media solutions offer many chances to come across customers....
– the whole trick is to reach them...
and the concepts make the difference...
Ten years ago we started Digital Signage business. Today we comprehend the meaning of Digital Media as an integral part of a holistic POS approach strategy. In multisensory scenarios we incorporate digital signage, sound, smell, haptic elements & light into sense congruent and impressive sensory perception experiences.

Contact details:
Frank Philipp Menzel
Sovato GmbH
Phone: +49 (0) 8208 957 33 20
Mail: pmenzel@sovato.com
www.sovato.com

Dr. Werner A. König,
Senior Consultant für Interactive Technologies bei der ICT AG

ICT AG is a specialist in the sector of interactive presentation systems and offers customized communication solutions which can be versatilely used due to their flexibility. The latest innovation in this sector is the interactive communication and presentation solution ICT smartPerform.

Contact details:
Dr. Werner A. König
ICT AG
Phone: +49-(0)7025-102-115
E-Mail: w.koenig@ict.de
www.ict.de

Oliver Mack,
Leiter Vertrieb Festinstallation und Prokurist bei der ICT AG

ICT AG is a specialist in the sector of interactive presentation systems and offers customized communication solutions which can be versatilely used due to their flexibility. The latest innovation in this sector is the interactive communication and presentation solution ICT smartPerform.

Contact details:
Dr. Werner A. König
ICT AG
Phone: +49-(0)7025-102-115
E-Mail: w.koenig@ict.de
www.ict.de

Michael Mumcuoglu,
CEO,
MeterLive Ltd.

MeterLive provides consumer insights by measuring people presence and mobility in the real world. Our services include audience measurement and per-campaign rating services for the out-of-home advertising industry based on a unique, passive and anonymous cellular-phone sensing technology.

Contact details:
Michael Mumcuoglu
MeterLive Ltd.
Phone: +972 (54) 462-1200
Mail: michael@meterlive.com
www.meterlive.com

Thomas Neumeister,
CMC, Sales Expert Infotainment, Kapsch BusinessCom AG

Kapsch BusinessCom is a leading systems integrator for innovative, made-to-measure solutions in telecommunications and networks, and an established provider of IT solutions for business customers.

Contact details:
Dkfm. Jutta Hanle
Kapsch BusinessCom AG
Phone: +43 50 811 5787
Mail: jutta.hanle@kapsch.net
www.kapschbusiness.com

Can Barış Öztok,
Deputy GM for Sales and Marketing, KoçSistem

Grundig is the most important electronics trademark in the world and KoçSistem is one of the leading IT services provider and one of the very few IT companies that can provide "design – implement – operate" elements of business solutions on an end-to-end basis which produce also digital signage solutions to Grundig.

Contact details:
Banu Söğüt Karaahmetoğlu/KoçSistem
Phone: +90 (216) 556 1566
Mail:banu.karaahmetoglu@kocsistem.com.tr
www.kocsistem.com.tr

Michael Pier,
Head of Product Innovation & Sales Communication, Telekom, Out-of-Home Media

Advertising that excites – that is the goal of Out-of-Home Media with high-value communication solutions in outdoor advertising.

In particular, the company develops, realizes and markets innovative digital signage services.

Contact details:
Michael Pier
Out-of-Home Media, Telekom
Phone: +49 228 18155762
Mail: M.Pier@telekom.de
www.telekom.de/oohm

Oliver Poppelbaum,
Managing Director,
ECE flatmedia GmbH

Mit dem größten digitalen Flatscreen-Netzwerk in 47 hochwertigen Shopping-Centern in Deutschland erreicht ECE flatmedia ca. 9 Mio. Center-Besucher in der Woche und erzielt eine Bruttoreichweite von über 38 Mio. Kontakten pro Woche. Dank kostengünstiger Produktion, punktgenauer Planbarkeit Ihrer Kommunikation nach Standort und Angebot und messbar hohen Kontaktzahlen bietet ECE flatmedia Ihnen ein exzellentes Preis-Leistungs-Verhältnis.

ECE flatmedia
Werbung, die bewegt.

Contact details:
Oliver Poppelbaum
ECE flatmedia GmbH
Phone: +49(0) 4060606 7021
Mail: Oliver.Poppelbaum@ece-flatmedia.com
www.ece-flatmedia.de

Albert Roelen,
CEO,
Adversign Media

AdversignMedia is a full service media agency, focused on Digital Signage Content and digital advertisement e.g. 3D animations or standard promotion videos. Adversign Media is also an operator of Digital Signage facilities in shopping malls.

Adversign media

Contact details:
Albert Roelen
Adversign Media
Phone: +49-211-355814-0
Mail: kontakt@adversign-media.de
www.adversign-media.de

Florian Rotberg,
Managing Director,
invidis consulting GmbH

Invidis consulting GmbH is a renowned European consulting firm for digital signage. The business model is based on four pillars; consulting, research, communications and events. To provide clients with all the necessary market information - comprehensive and accurate industry data in the entire digital signage value chain are continuously collected and analyzed.

inVIDIS CONSULTING

Contact details:
Christine Koller
invidis consulting GmbH
Phone: +49 89 2000 416 - 17
Mail: christine.koller@invidis-consulting.de
www.invidis.de

Michael Russo,
CEO,
Tridelity AG

TRIDELITY AG is a leading provider of autostereoscopic 3D displays (26“ – 65“) providing a highest-quality 3D without glasses. TRIDELITY screens offer an unprecedented viewing comfort, exceptional 3D depth and the highest resolution in the industry. The latest developments of TRIDELITY are the worlds first 56“ QuadHD display, which is able to show 4K of resoulution without glasses, and the realtime conversion of ordinary 2D video-signals for TRIDELILTY displays – the so-called „TriV“.

TRIDELITY 3D TECHNOLOGIES

Contact details:
Michael Russo
Tridelity AG
Phone: +49 (0) 7724 859806-30
Mail michael.russo@tridelity.de
www.tridelity.com

Stefan Schönfeldt,
Key Account Manager
bei der ICT AG

ICT AG is a specialist in the sector of interactive presentation systems and offers customized communication solutions which can be versatilely used due to their flexibility. The latest innovation in this sector is the interactive communication and presentation solution ICT smartPerform.

ict Für alle Fälle. Für alle Sinne.
Innovative IT- und Medientechnik

Contact details:
Dr. Werner A. König
ICT AG
Phone: +49-(0)7025-102-115
Mail: w.koenig@ict.de
www.ict.de

Fabian Scholz,
Geschäftsführer,
komma, tec redaction GmbH

Komma, tec redaction GmbH is a specialist agency for digital communication, and provider of comprehensive digital signage solutions. As a 360 ° communication agency, we offer everything around the topic of digital signage from a single source – up to the software to manage displays, the hardware from servers to monitors, the nationwide installation and the creation of your editorial content – everything from one source!

komma,tec redaction GmbH

Contact details:
Fabian Scholz
Komma,tec redaction GmbH
Phone: 040-3037518-0
Mail: scholz@kommatec-red.de
www.kommatec-red.de

Oliver Schwede,
Senior Analyst,
invidis consulting GmbH

Invidis consulting GmbH is a renowned European consulting firm for digital signage. The business model is based on four pillars; consulting, research, communications and events. To provide clients with all the necessary market information - comprehensive and accurate industry data in the entire digital signage value chain are continuously collected and analyzed.

inVIDIS CONSULTING

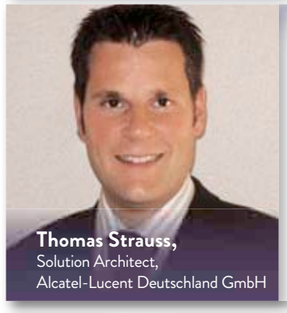
Contact details:
Christine Koller
invidis consulting GmbH
Phone: +49 89 2000 416 - 17
Mail: christine.koller@invidis-consulting.de
www.invidis.de

Andreas Soupliotis,
President & Chief Executive Officer,
Ayuda Media Systems Inc.

Ayuda Media Systems is the developer of theAyuda Platform: cloud-based software for digital and traditional OOH network operators that allows them to run more effectively. Functionality includes CRM, sales proposals, mapping, contract management, billing, financial reporting, proof of play, digital CMS, and a free software digital signage player (based on the OpenSplash standard). To date, the Ayuda Platform has billed over $250M of OOH campaigns and currently operates over 300,000 advertising faces in North America, Canada and Australia. The platform is used by worldwide clients such as CBS and EYE Corp.

ayuda

Contact details:
Madalyn Roker
Ayuda Media Systems Inc.
Phone: + 44 (0) 208 741 8271
Mail: madalyn@ayudasystems.com
www.ayudasystems.com



Thomas Strauss,
Solution Architect,
Alcatel-Lucent Deutschland GmbH

Alcatel-Lucent‘s Media & Advertising Services unit is positioning itself as a technical service provider in the Digital Out of Home market and is also taking over end-to-end responsibility for digital media projects. In all activities, from business consulting through customized integration of complex solutions to professional network operations, the company is delivering customer specific solutions. In 2009, Alcatel-Lucent launched Taxi-TV, an infotainment service for taxi passengers. Just recently, Alcatel-Lucent and advertising specialist CityUp started „Schaufenster-TV“, a new service which is enabling digital advertising in shop windows.

Alcatel·Lucent

Contact details:
Anne Pech
Alcatel-Lucent Deutschland GmbH
Phone: +49 711 821 46102
Mail: Anne.Pech@alcatel-lucent.com
www.alcatel-lucent.com

Stefan Tiefenthal,
Sales Manager,
Cittadino GmbH

Cittadino is a full service agent for digital signage. Cittadino offers hard- and software solutions as well as content productions directed at specific target groups. Cittadino developed picturemachine® – a modular software for the production, distribution and monitoring of multimedia content.

CITTADINO

Contact details:
Franz Josef Medam
Cittadino GmbH
Phone: +49 (0)211 902 95 24
Mail: franz.josef.medam@cittadino.de
www.cittadino.de

Swen Ch. Topp,
Leiter Marketing / Vertrieb,
medmedia GbR

Since its founding in 1995, memedia has been an agency for new media by specialising in design, internet, application, development and marketing. The in-house developed software solution „miX-L" is largely independent of content and screen formats and runs on conventional windows PCs without requiring specialised hardware. www.mix-l.com

memedia

Contact details:
Swen Ch. Topp
memedia GbR
Phone: 0049 89 / 2190980-0
Mail: s.topp@memedia.de
www.memedia.de)

Karl-Joachim Veigel,
Geschäftsführer,
PrimeConsult

Customer satisfaction is our success – about 30 years of experience in the IT industry, from the now historic telex machine to personal computer, from data communications and software to digital media solutions is the span of experience which is offered to midcap companies to support them in solving their challenges.
Areas of expertise are market analysis and trend scouting, portfolio review and optimization, vulnerability analysis, turn around and business restructuring measures.

PrimeConsult

Contact details:
KJ. Veigel
Prime Consult
Phone: +49 89 23547604
Mail: kj.veigel@live.de
www.prime-consult.de

Thorsten Wien,
Managing Partner,
Visual Art Germany GmbH

Established in 1997, VISUAL ART ist a reliebale Partner for your digital media solutions. The portfolio of the VISUAL ART group includes the development of concepts, production and digital management.

VISUALART

Contact details:
Thorsten Wien
VISUALART Germany GmbH
Phone: + 49 40 55 89 852-13
Mail: thorsten.wien@va-germany.com
www.va-germany.com

Mariana Yordanova,
CEO,
mediabiose GmbH

Mediabiose develops sustainable media-facade-applications for buildings of public and retail use. Visible from big distances they can turn to an effective add-on for digital signage solutions increasing their reaching area and introducing them to a greater amount of participants.

mediabiose

Contact details:
Mariana Yordanova
mediabiose GmbH
Mail: mariana.yordanova@mediabiose.com
Phone: +49/89 80918977
www.mediabiose.com

Additional speakers

Helga Ebel-Gerlach,
Geschäftsführende Gesellschafterin, CityUp GmbH & Co. KG

Jürgen Hausmann,
Vorstand, EVISCO AG

Clemens Lutsch,
User Experience Evangelist, Microsoft Deutschland

Denise MacDonell,
General Manager, Harris DOOH

Additional speakers

Sven Schneider,
Geschäftsführer, expectare Deutschland GmbH

Volker Selle,
Senior Vice President, Cheil Germany GmbH

Mark Weisbrod,
Marketing Manager, metaio GmbH

Manfred Zötl,
Senior-Consultant, Flughafen München GmbH

Dirk Schmidinger,
Manager Germany, Samsonite

As at: September 6th 2011

ECO INNOVATION

SLIMMER
LIGHTER
GREENER

LED BACKLIGHT

NEW NEC XS SERIES

SLIM-SLIM PROFILE
PROFESSIONAL 24/7 READY
FULL HD RESOLUTION
LED BACKLIGHT TECHNOLOGY
46" AND 55" MODELS
REFERENCE STANDARD
OPS SLOT IN PC'S

XS Super Slim, 24/7 Ready.

PROFESSIONAL GRADE DISPLAY
ELEGANCE, POWER AND EFFICIENCY
FOR MISSION CRITICAL APPLICATIONS

The World's first display combining a professional grade LED backlit panel and low powered slot-in PC modules, setting the new standard for FIDS display systems. The LED backlight technology delivers significantly lower energy use, less heat and allows for a 44mm super slim design. The XS Series also feature an industry standard OPS slot, with PC modules to power FIDS and digital signage.

NEC, innovative display solutions delivering airport carbon reduction.

Reference Standard Displays **www.nec-display-solutions.com**

Copyright 2011 NEC Display Solutions Europe GmbH. All rights are reserved in favour of their respective owners. This document is provided "as is" without warranty of any kind whatsoever, either express or implied.

Empowered by Innovation NEC

Anzeige

Anzeige

Photo: Thomas Vizthum

DiSCO

DIGITAL SIGNAGE CONFERENCE

30 January, 2012
Amsterdam RAI, NL

- Class-leading debate, information, and thought leadership for the digital place-based media industry.
- Co-located at ISE 2012: Europe's largest single assemblage of digital signage technology.
- DiSCO 2012 – THE digital signage conference.
- 'DiSCOver' more: **www.disco-europe.org**