Broadcasting in the area of convergence

The Regulatory Environment for future Mobile Multimedia Services

Soeren Hess, **bmco**forum

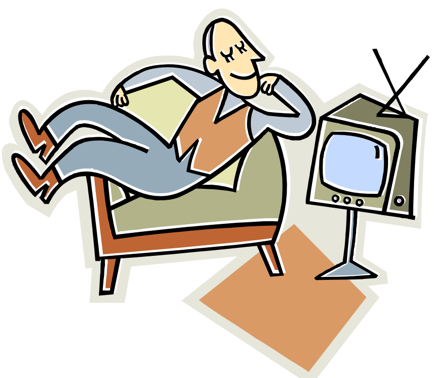
bmcoforum members: 59 (as of June 2006)

Content creators
Content aggregators
Service providers
Mobile network operators
Broadcast network operators
Silicon vendors
Solution providers
Terminal and platform vendors
Regulatory bodies
Research institutions

Why mobile broadcasting ?

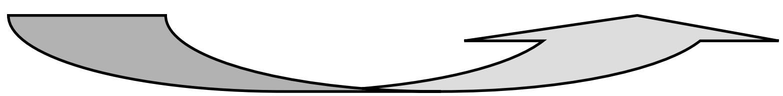
_ Media structure is changing all over Europe

- Cable TV penetration reaching 85-99 %
- Satellite penetration of 15-20%
- Fiber to the home comming soon > 25/25 Mbit/s
  - _ Television via the computer
  - _ Video on demand
  - _ Technology providing my program automatically



Consumers views: No more ’SOFA-TV’

Personalised TV on their own mobile device...



See it live – when it happens with interactivity

- ✓ Follow the match
- ✓ Bet on the result
- ✓ Bet on the next corner
- ✓ Check the other matches
- ✓ Check web on the players
- ✓ And I do it while in the train....

Our trials have confirmed the requirement

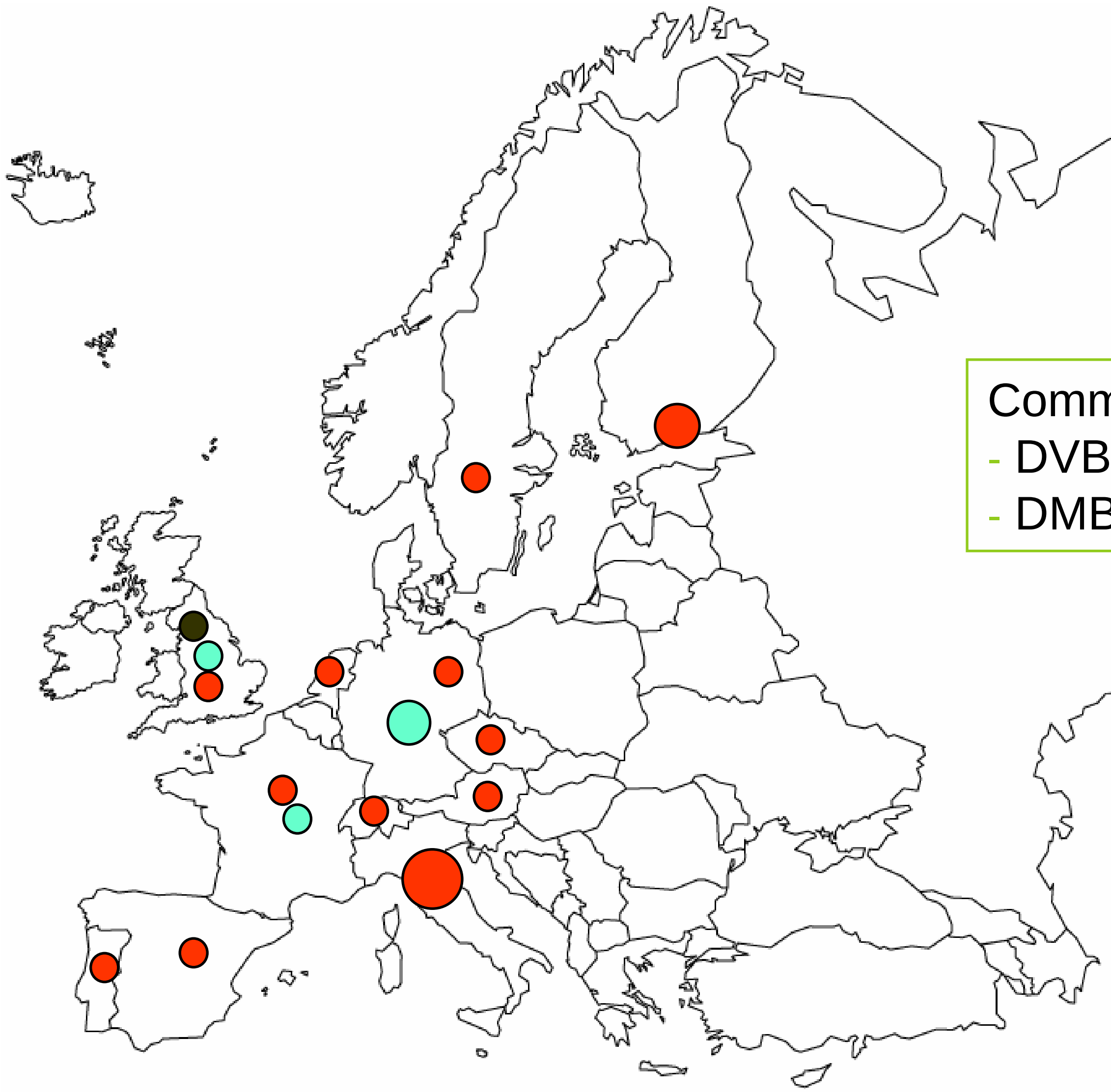
Mobile Broadcasting – true convergence

- Up to 25 TV-programs received on my personal receiver
- Uplink in telecommunication bands – downlink in UHF
- Competition and technology neutrality

- Convergence in the terminal not in the system

- European coverage with European regulation

Pilots & Pre-Commercial Networks Europe Wide



Commercial services:in Europe
- DVB-H in Italy since May 2006
- DMB in Germany since May 2006

DVB-H
T-DMB
MediaFlo

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Broadcast_Mobile_Convergence

bmcoforum / Siemens / Abertis Telecom Mobile TV DVB-H live demo at 3 GSM World Congress 2006 in Barcelona

Broadcast Network Operator

Abertis Telecom (Channel 42)

DVB-H Broadcast Network covering Fira Exhibition Area

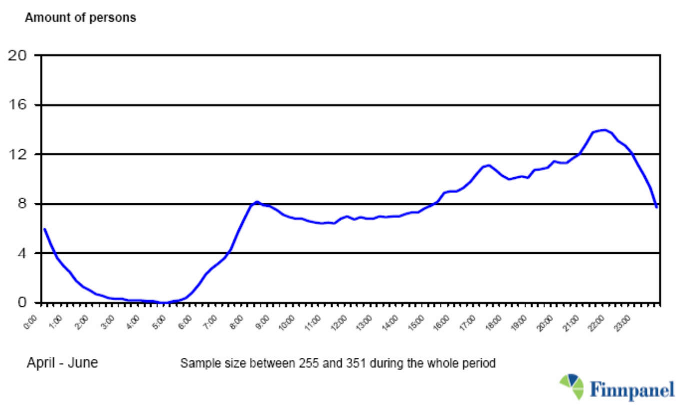
Siemens Media Delivery Solution

TV CHANNELS

1. CNBC
2. MTV1
3. MTV2
4. MTV3
5. TELECOM TV
6. CNN
7. BBC WORLD
8. RAI OLIMPICS TORINO
9. BARÇA TV
10. Abertis
11. Abertis
12. Abertis
13. SIEMENS LIVE
14. MiTV + DEMO CONTENT
15. MiTV + DEMO CONTENT
16. Free

bmcoforum IOP Participants: BenQ, LG, Motorola, NEC, Philips, Samsung, Siemens and other (more than 15 different phone, platform or chipset manufacturers

Learned lesson from trials



- In all European trials about 50% of liked the service
- Readiness to pay (up to 10 € p.m.)
- up to 50% are willing to change the provider if his own isn’t providing mobile TV services
- Mean watching per channel 10 to 15 min., twice a day
- But longer formats are also watched (sport)
- Unexpected high percentage of watching at home (other room, other channel)
- Indoor coverage is a critical success factor

First end user devices are available

BenQ

Sagem

Samsung

Motorola

LG

Nokia

RRC-06 results

- Successfull results in most countries – 98%
- 7-8 layers of digital television
- Digital switch-over too late – we need it now
- Flexibility needed to provide multimedia

- Mobile Broadcasting started in high density areas
- 2 nation wide network MUXes needed
  - Timely availability
  - Indoor coverage

Digital plan is useful for Mobile Broadcasting

Analogue switch-off timeline in Europe

	Full launch	ASO Type	ASO Approach	First ASO	Last ASO
Fully Launched Platforms					
UK	October 2002	target	regional	2008	**December, 2012**
Sweden	September 1999	firm	regional	September, 2005	**February, 2008**
Spain	November 2005	target	regional	December, 2007	**April, 2010**
Finland	October 2002	firm	national	December, 2006	**December, 2006**
Netherlands	April 2003	government fiat	national	2007	**2007**
Germany	May 2004	target	regional	August 2003	**2010**
Italy	January 2004	target	regional	January 2006	**December 2006**
France	December 2005	target	regional	2007	**March 2010+**
Limited Launches					
Switzerland	2006	government fiat	regional	2007	**2009**
Belgium	2006	government fiat	regional	2010	**2010**
Not yet launched					
Austria	2007	target	regional	mid-2007	**2010**
Norway	2006	firm	fast regional	2007	**2009**
Denmark	2007	firm	national	2011	**2011**
Ireland	2007				**2010**
Portugal	2007				**2012**
Greece	NA				**2015**

Note: Spain and UK based on re-launch dates

Source: EBU

Next steps towards frequency provisioning

- MUX planning – for DVB-T and for DVB-H
- MUX regulation – providing access for Mobile Broadcasting
- National implementation of the digital plan
- Digital switch-over towards 2015
- Content regulation to facilitate mobile multimedia

- **Regulatory certainty needed for Mobile Broadcasting**

Before digital switch-over

Conclusions

- Users are willing to accept Mobile TV
- Technology is ready for deployment
- Stakeholders have started to form the value chain

But:

- Danger of market fragmentation through different technology approaches
- National media regulation to be adapted
- Regulatory certainty needed on frequency provisions
- Harmonised approach will guarantee seamless services

Who will Winn ?

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