



Regulatory convergence?

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Outline

EU regulatory landscape

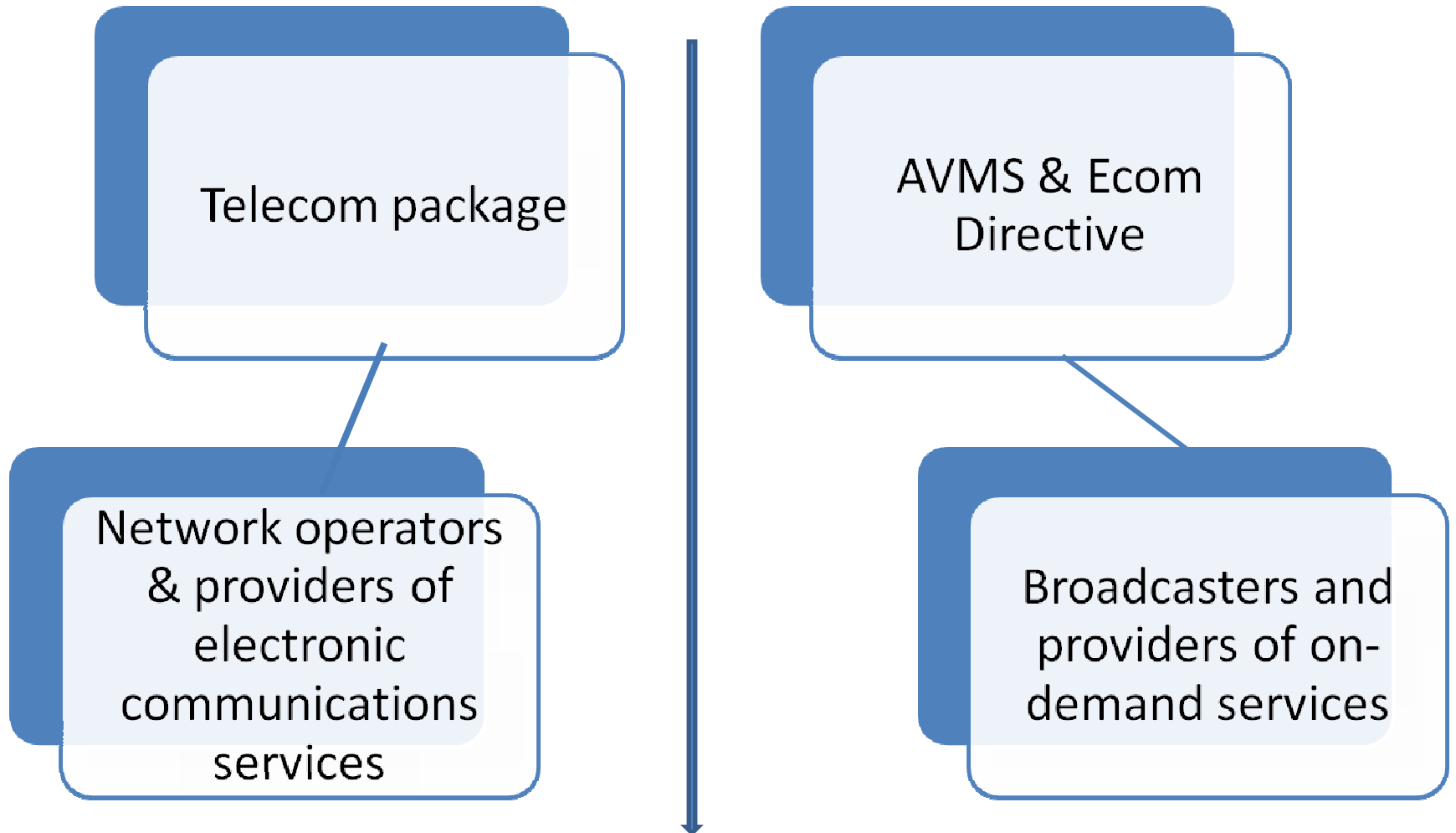


Grey/untouched areas/room for manoeuvre

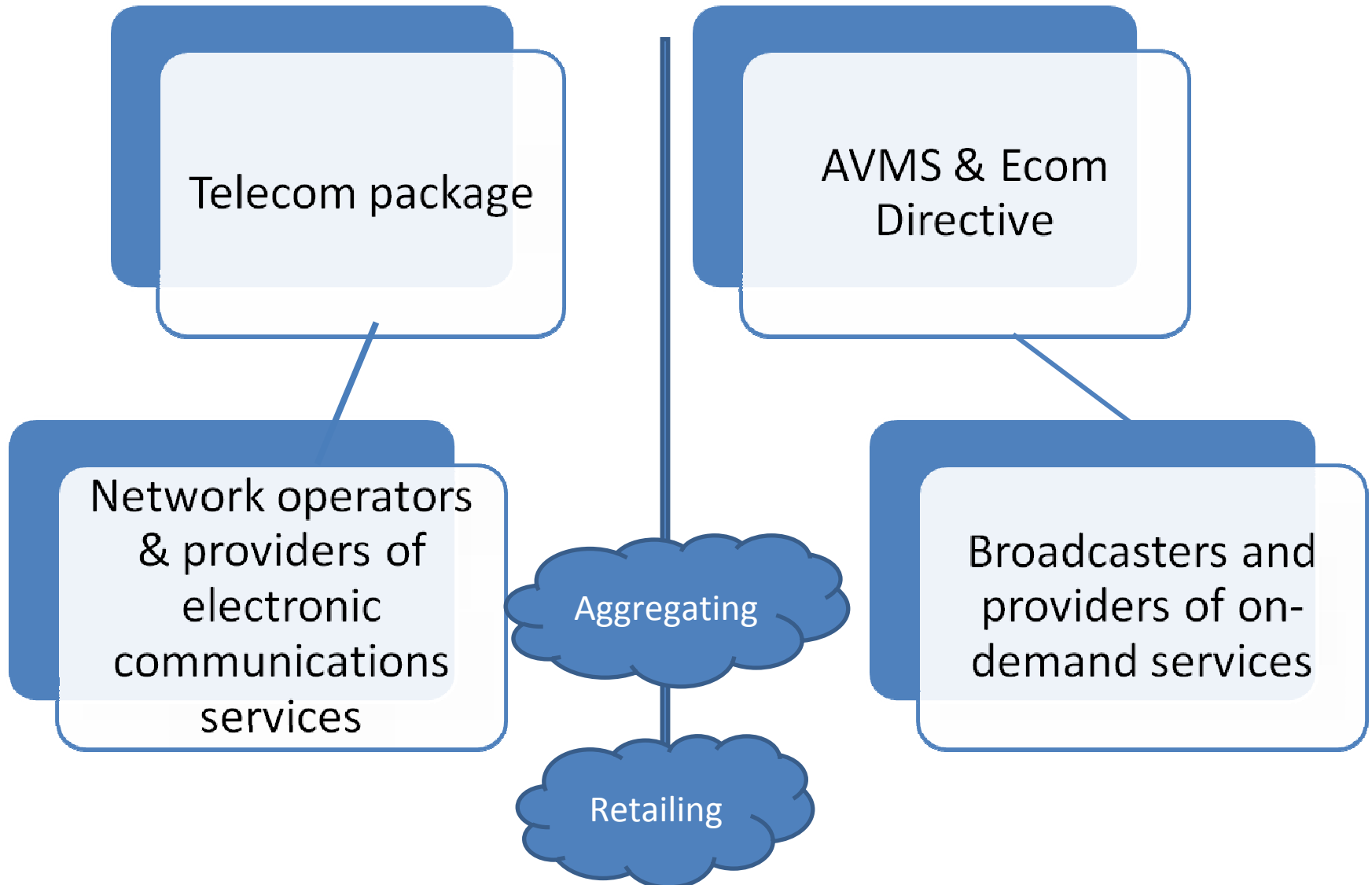


The case of mobile TV and HD TV

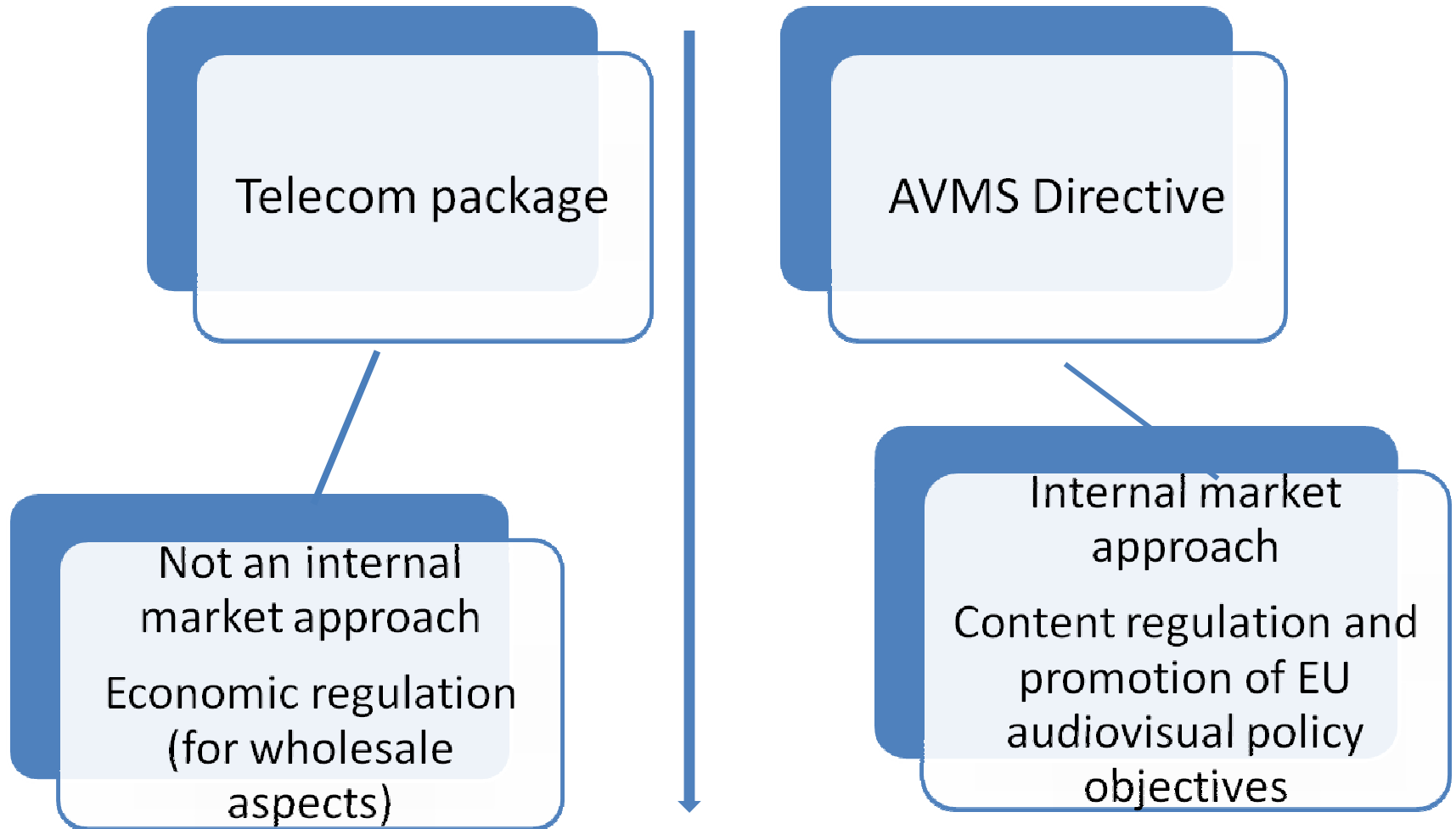
EU regulatory framework



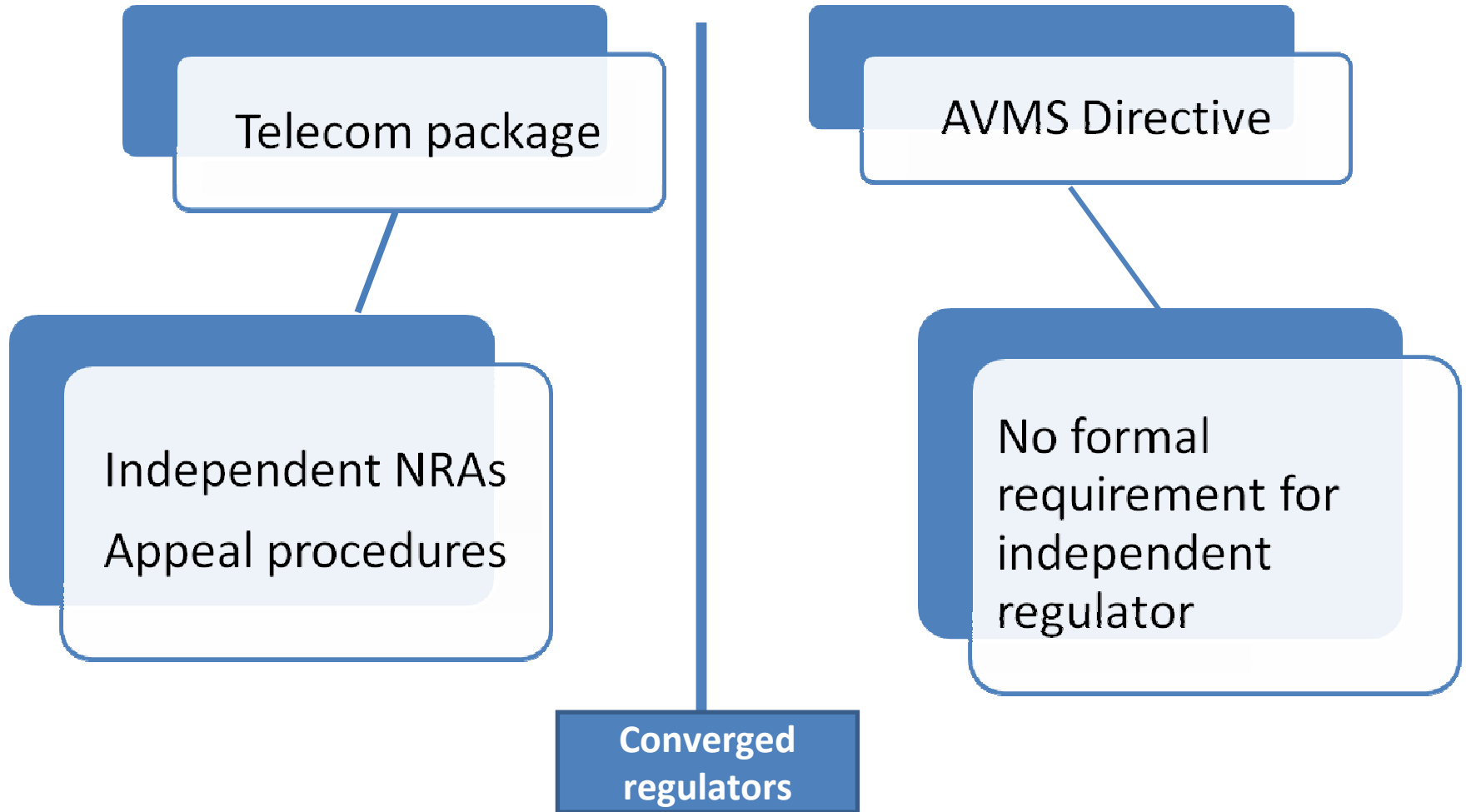
EU regulatory framework



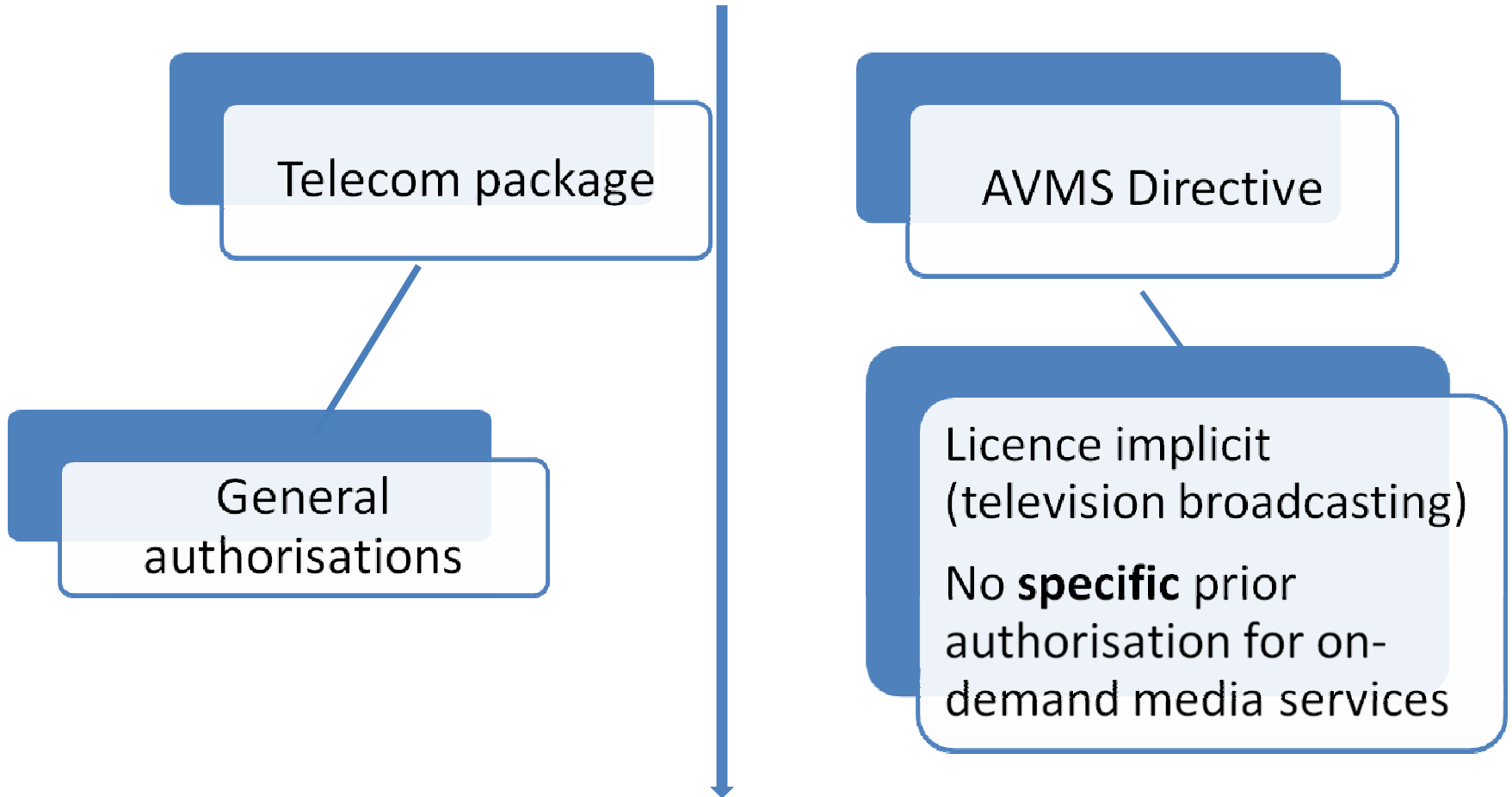
EU regulatory framework



EU regulatory framework



EU regulatory framework



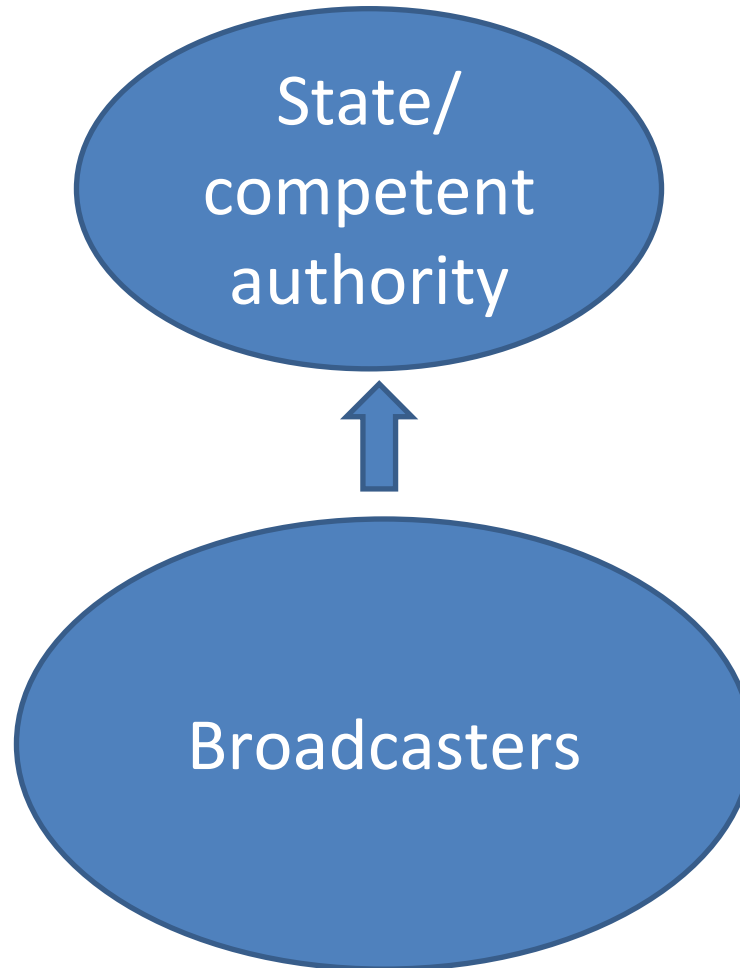
Powers of Member States and of national regulators

Minimum
harmonisation

Untouched areas
of EU law

Powers of NRAs
(clearly defined
in Framework
Directive but not
in AVMS)

Untouched areas: Licensing



Licensing: very different approaches

Platform specific

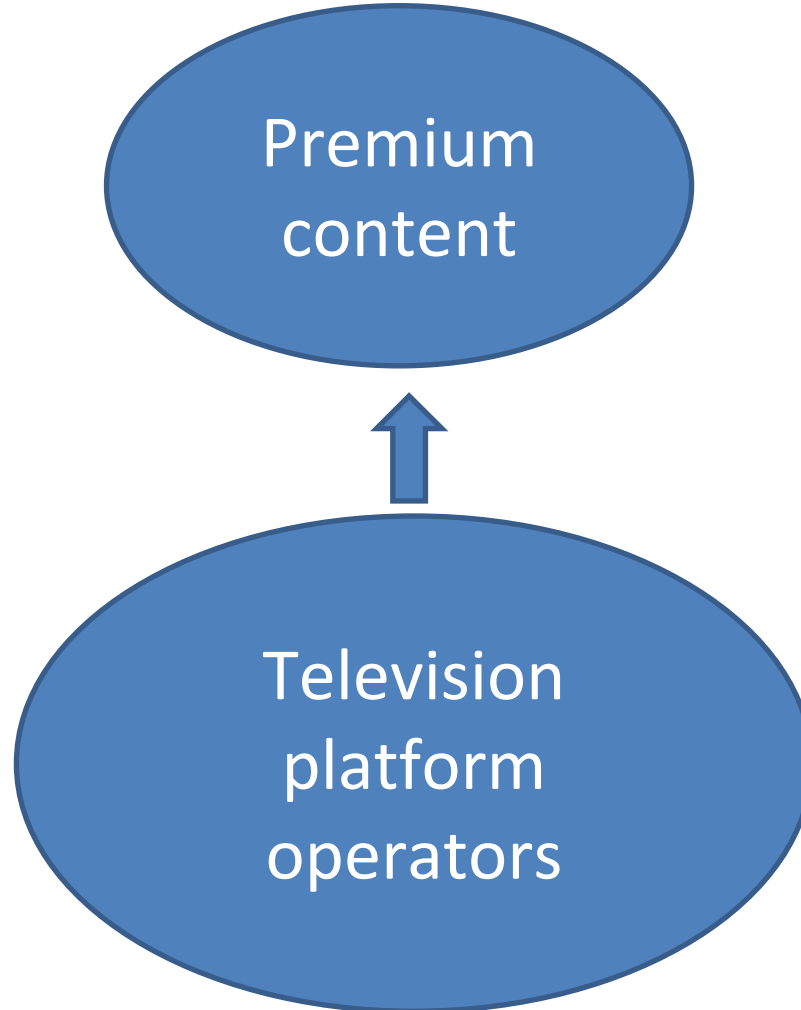
- Italy
- Finland
- UK
- France

Platform neutral

- Germany
- Spain
- the Netherlands

Length varies, licensing authority can also vary

Untouched areas: access to premium content



Untouched areas: access to content

Competition decisions

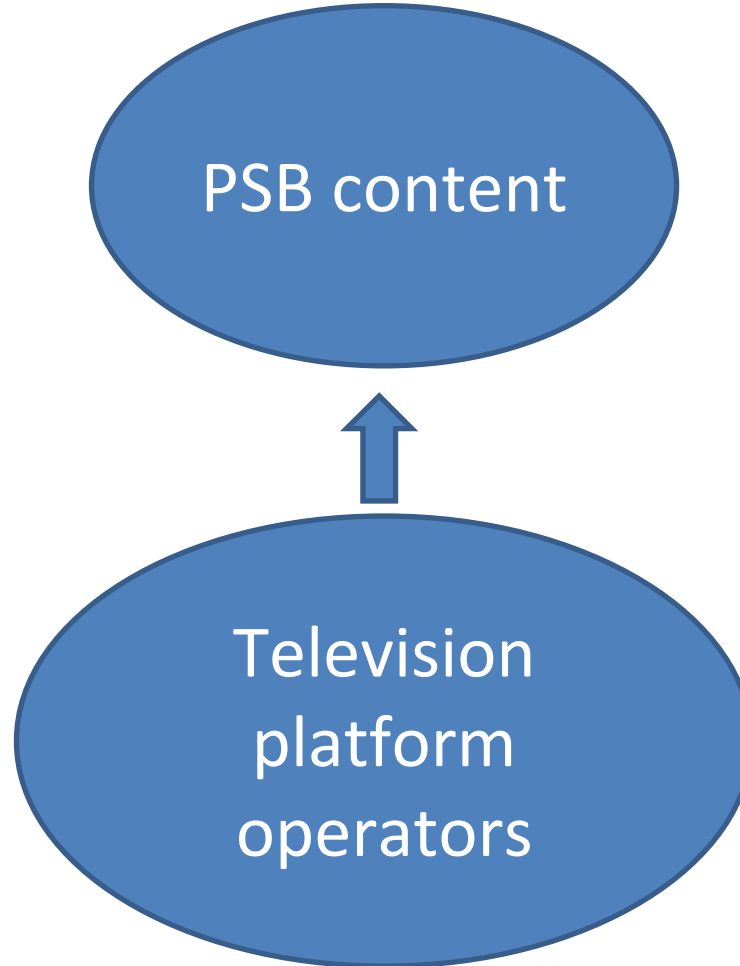
Legislation (e.g. must offer)

Power of the regulator

IPR licensing

Windows

Untouched areas: PSB new services



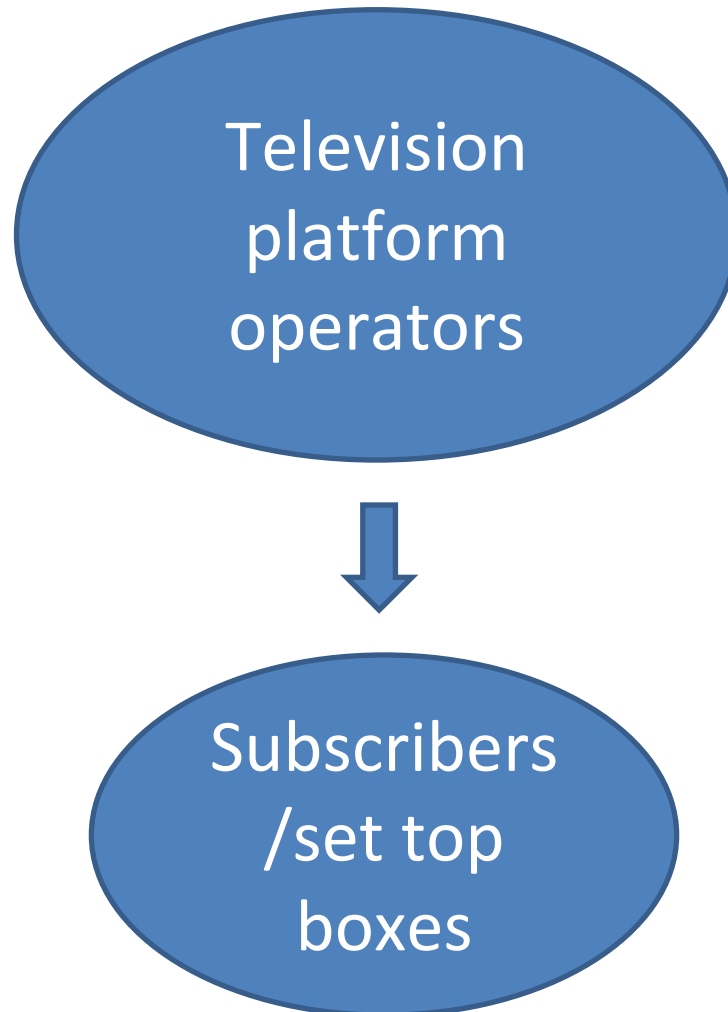
Untouched areas: PSB new services

EU state aid
scrutiny

PSB remit for
presence on
distribution
platforms

Ex ante test
for new
services (DE,
UK)

Untouched areas: relationship with subscriber

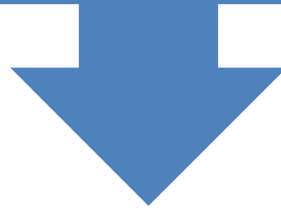


The case of new converged services: mobile TV

- Wireless service = cross border potential
- Need for spectrum
- Complex value chain: content, mux, transmission network operator, end user access and billing

Mobile TV

Commission communications and DVB-H added to
list of standards
(only covers e-communications aspects!!!!!!!!!!!!!!!)



Very different national approaches

Mobile TV: launch delayed

Emphasis on selecting content (pluralism)

- France

Plain wholesale model/emphasis on ensuring availability of transmission

- Finland

Integrated model/emphasis on ensuring agreement between operators of value chain

- Austria
- Germany

HD TV

- Increasingly available on satellite, IPTV and cable
- Challenge to ensure availability on DTT
- Requires compatible end-user devices (including set-top-boxes)

HD TV/DTT: launch delayed

No Commission intervention



Very different stages of development
Launch requires strong intervention of regulator

HD TV/DTT

France

- 5 HD channels available since Oct. 2009
- Selected by CSA (broadcasting regulator)

FI, IT, UK

- Launch soon

DE, NL, ES

- No plans before switch-off

HD TV/DTT/UK

No spectrum available



Mux cleared of existing services. Upgrade to MPEG 4 and DVBT-2, Ofcom selects TV channels + plan to reallocate interleaved spectrum