



Synergies between network operators and content providers in Italy

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AGCOM Commissioner

**EETT's 6th International Conference
Advanced communication infrastructures
as a cornerstone for Europe's Digital Agenda**

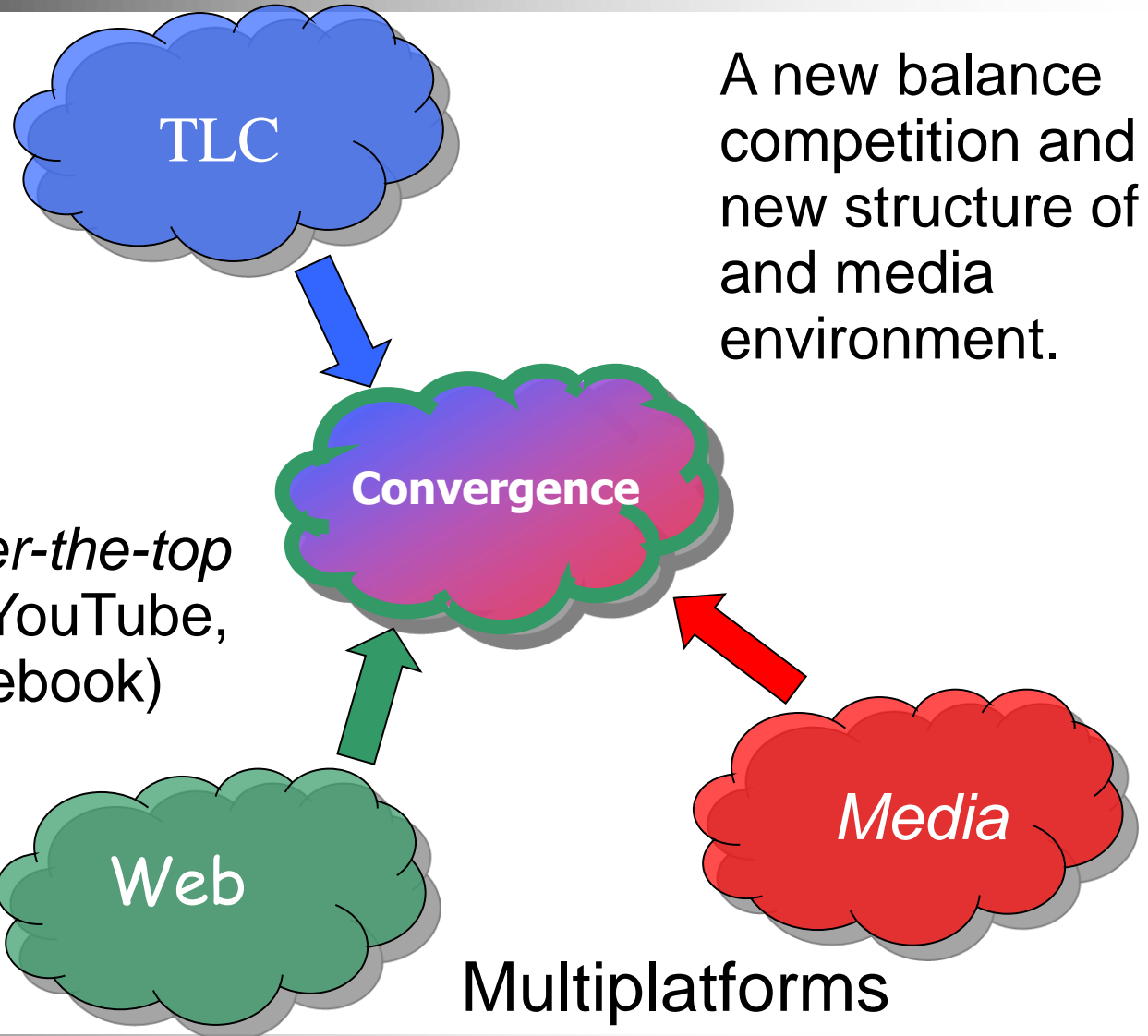
Athens, June 3rd, 2011

Convergence (1/3)

Convergence closes the “*divergence age*” in which networks growth independently.

Boom of over-the-top (Yahoo, Google, YouTube, eBay, Skype, Facebook)

The **sector** is multi - network and multi-service



As growth of voice services is constantly slowing down, telecom operators are looking at broadcasting services as a potential and interesting source of revenues

On the supply side: undertakings operating at different levels of the production chain want to extend their activities along the whole value chain on the technological side, because digitalization helps the spread of activities.

Revenues deriving from networks and traditional services are decreasing, while a relevant share of the market derives from intermediation activities, services and multimedia contents.

On the demand side: users take advantage of new tools to satisfy their needs of communication and information.

Users use more and more convergent services, they buy different services available on different communication networks paying only one price (voice, TV, Internet access), the so called *cross-selling*.

User have new roles depending of new social and cultural changes on media:

- Active role user
- Fan user
- Multicarrier User (see Tv as one of others)
- Generator content User (Internet like – social network)

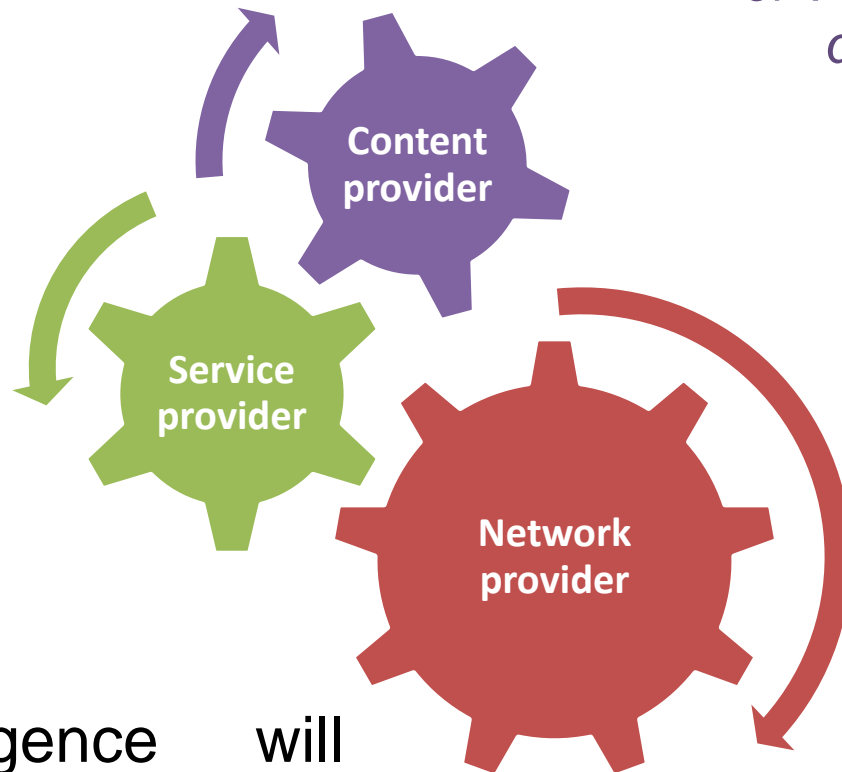
Omni-players: a bit is a bit (1/2)

Old players split
in at least:

*Provide interactive
or conditioned
access services, with
pay per view too*

*Owner of the network
allowed to electronic
communication
transmission*

*Programs editor
of TV and radio
diffusion*



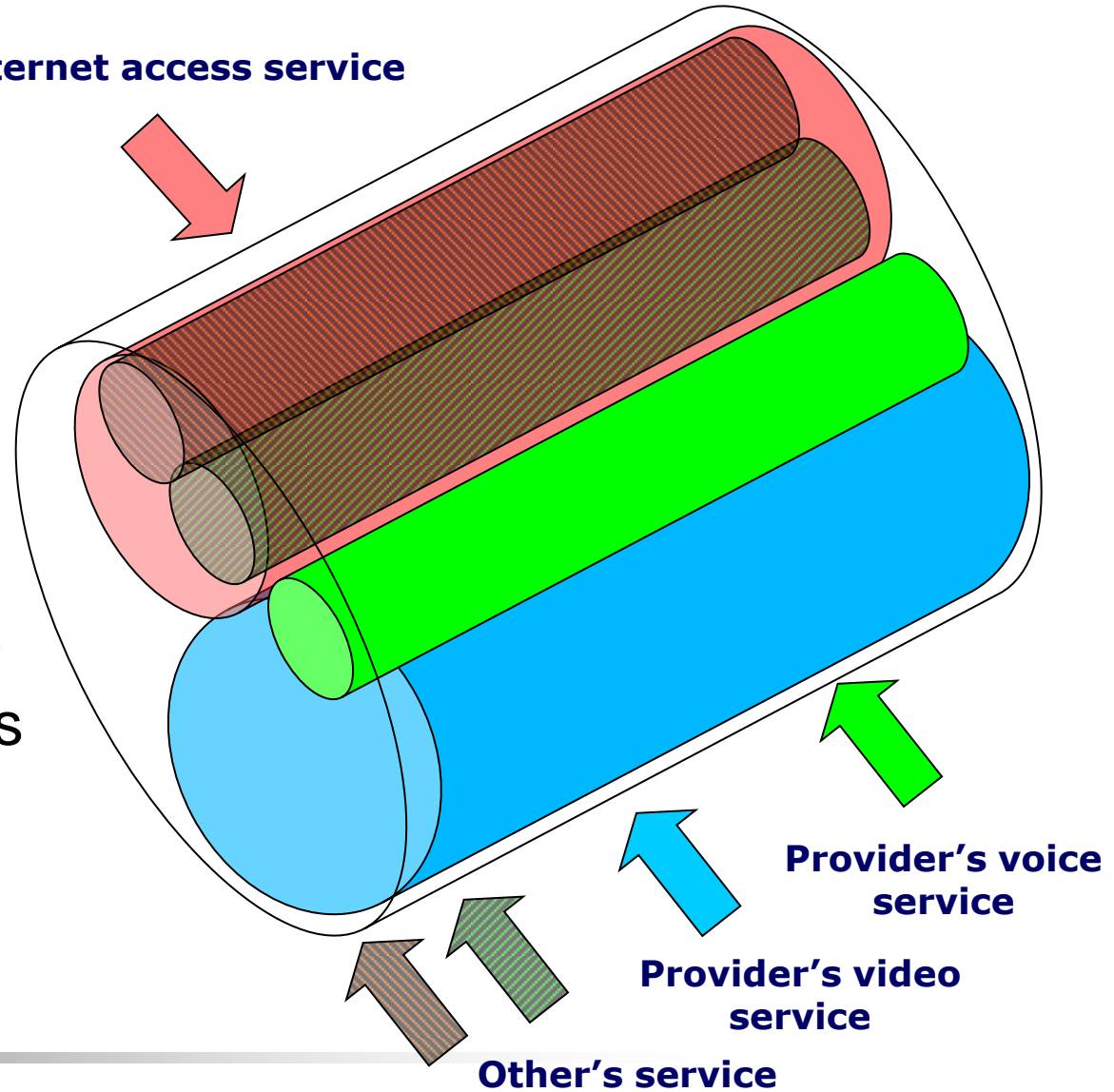
Commercial convergence will
increase in the next future.

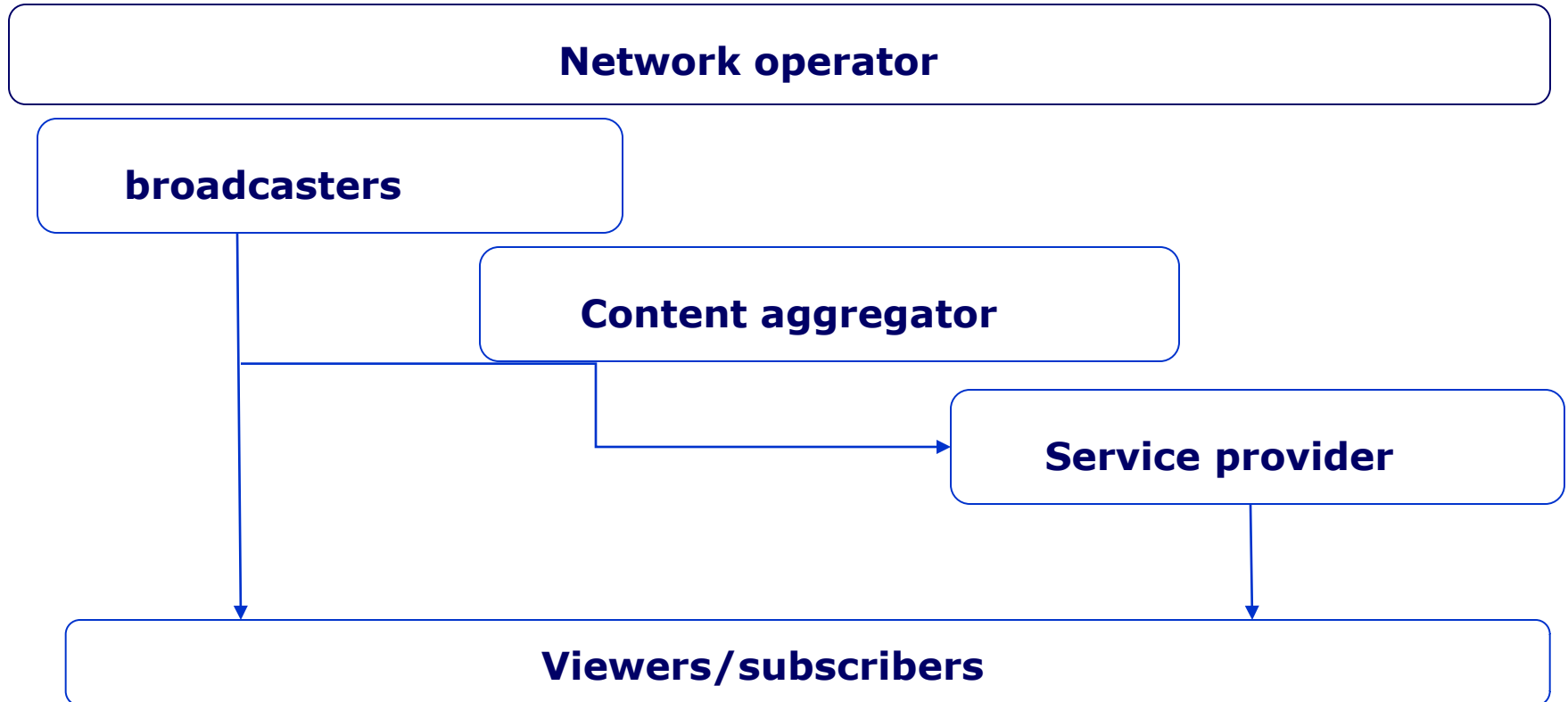
Omni-players: a bit is a bit (2/2)

Internet access service

Residential broadband connection

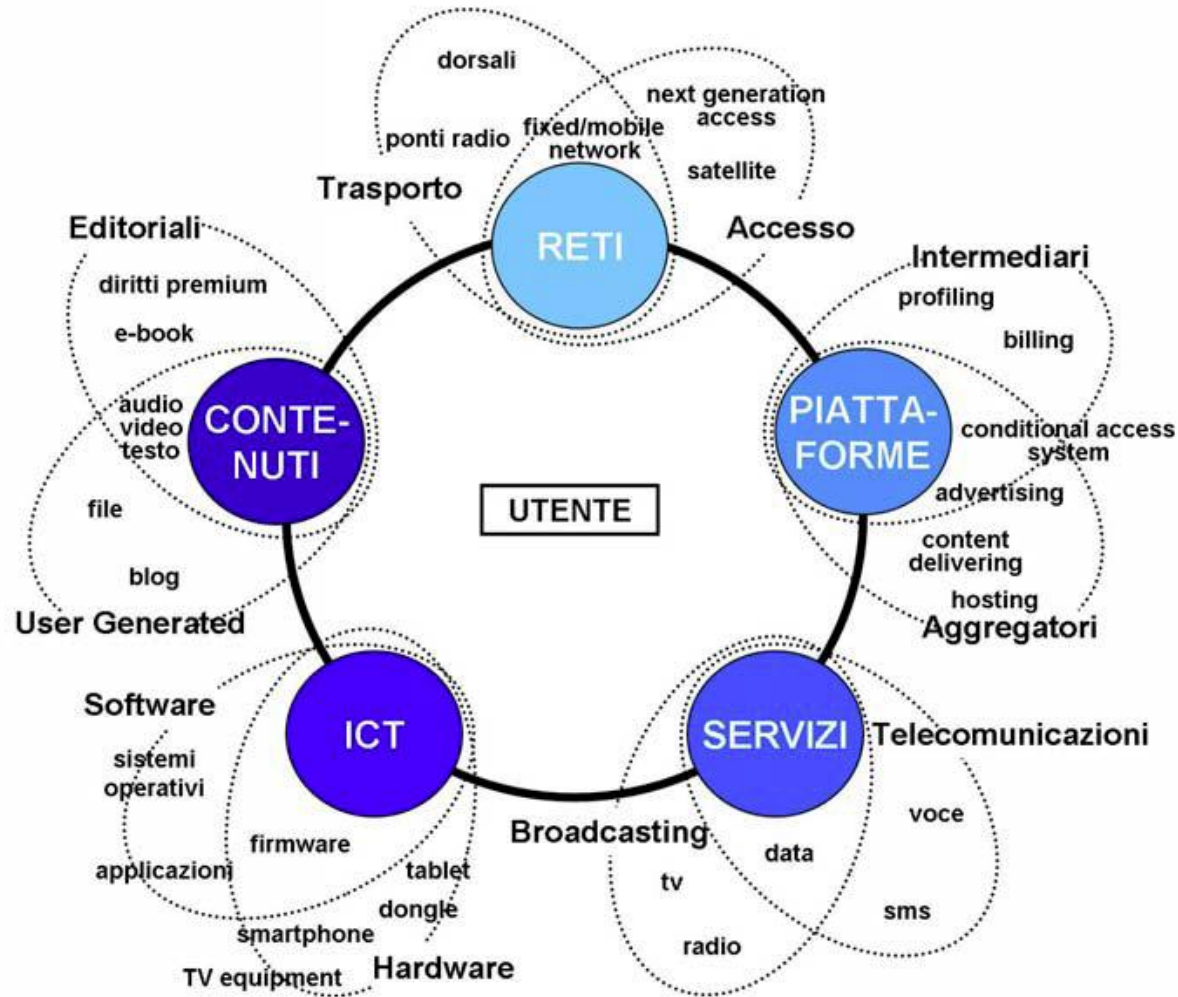
The technological and commercial convergence does not mean that the different networks and platforms are seen by users as interchangeable





Platform managers are like *gatekeepers*. They are in charge of the *control function*.

New value chain



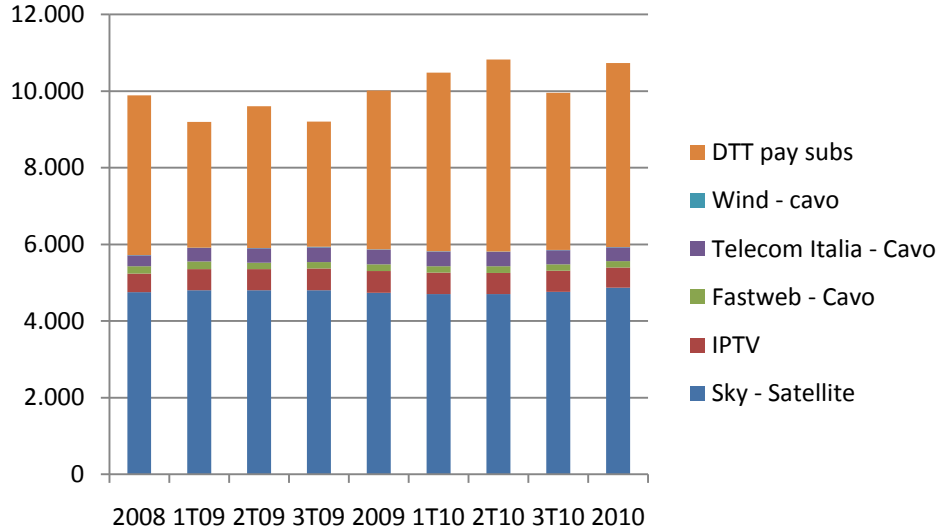
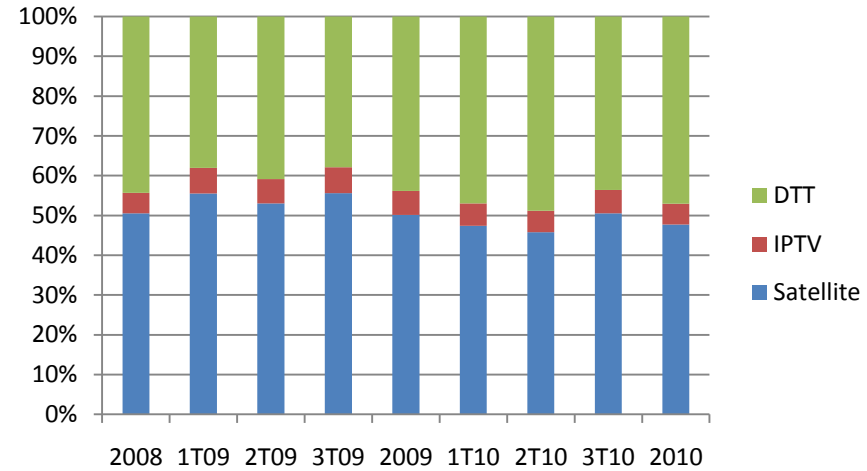
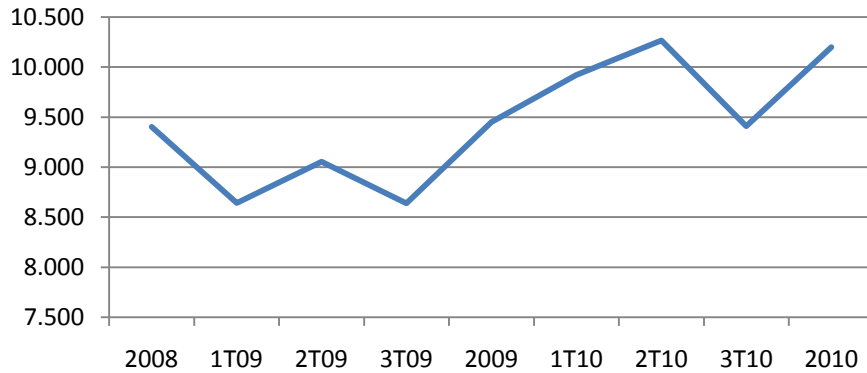
EU Recommendation
 2009/848/CE: by the 1^o
 January 2012 the switch over
 process has to be completed

In Italy the switch off of
 analogue system is almost
 accomplished.

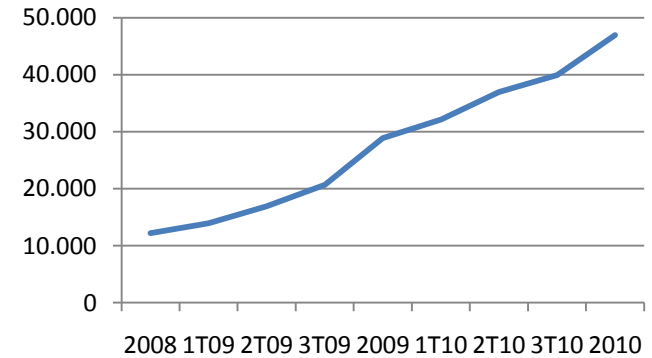


The regions *all digital* are: Sardegna, Lazio, Campania, Valle d'Aosta, Piemonte, Lombardia, Veneto, Emilia Romagna, Trentino and Friuli Venezia Giulia.

Pay TV



Deco. DTT venduti





Thanks for your attention

Enzo Savarese
AGCOM Commissioner