



# Regulatory convergence?

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# Outline

EU regulatory landscape

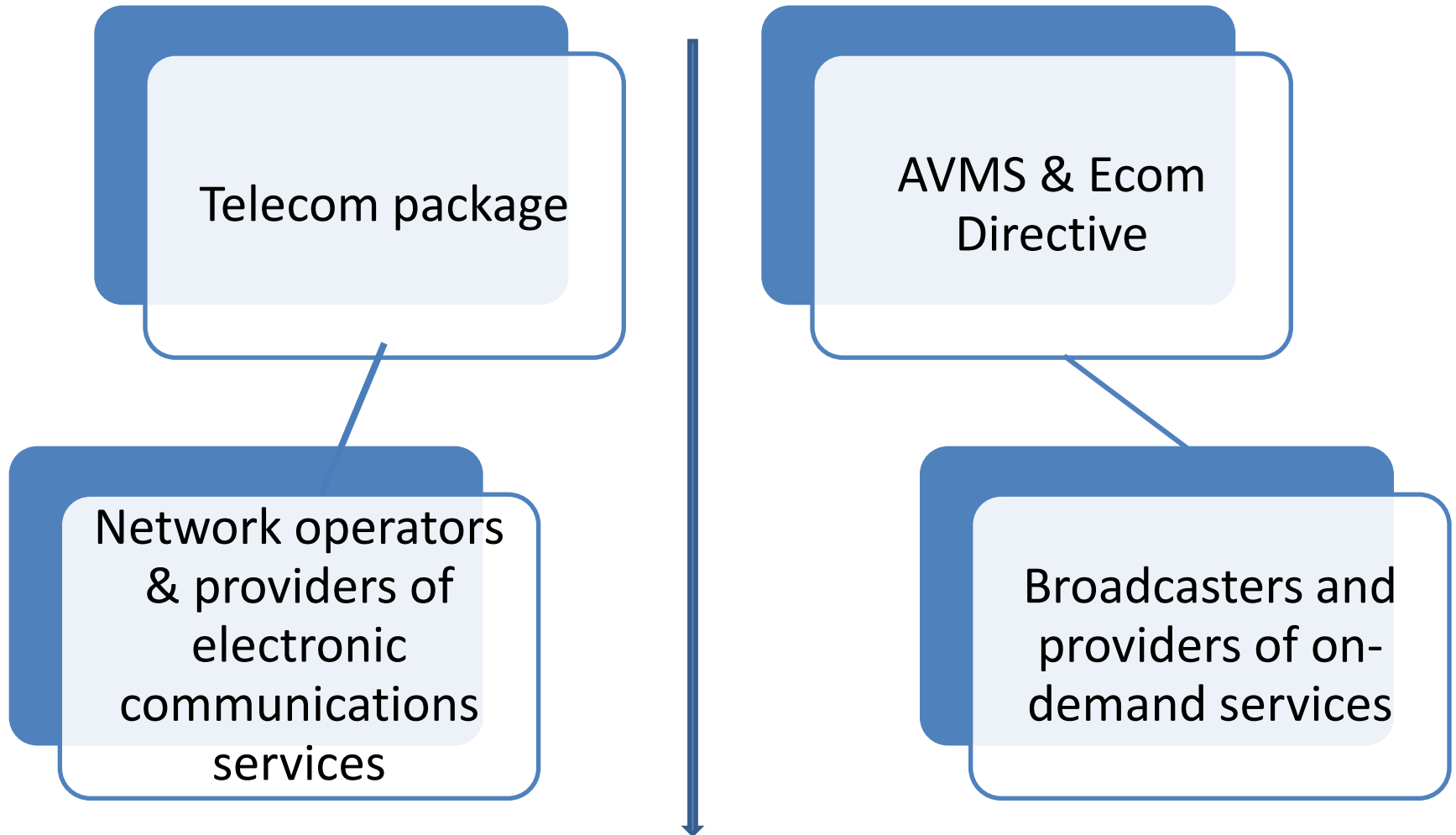


Grey/untouched areas/room for manoeuvre

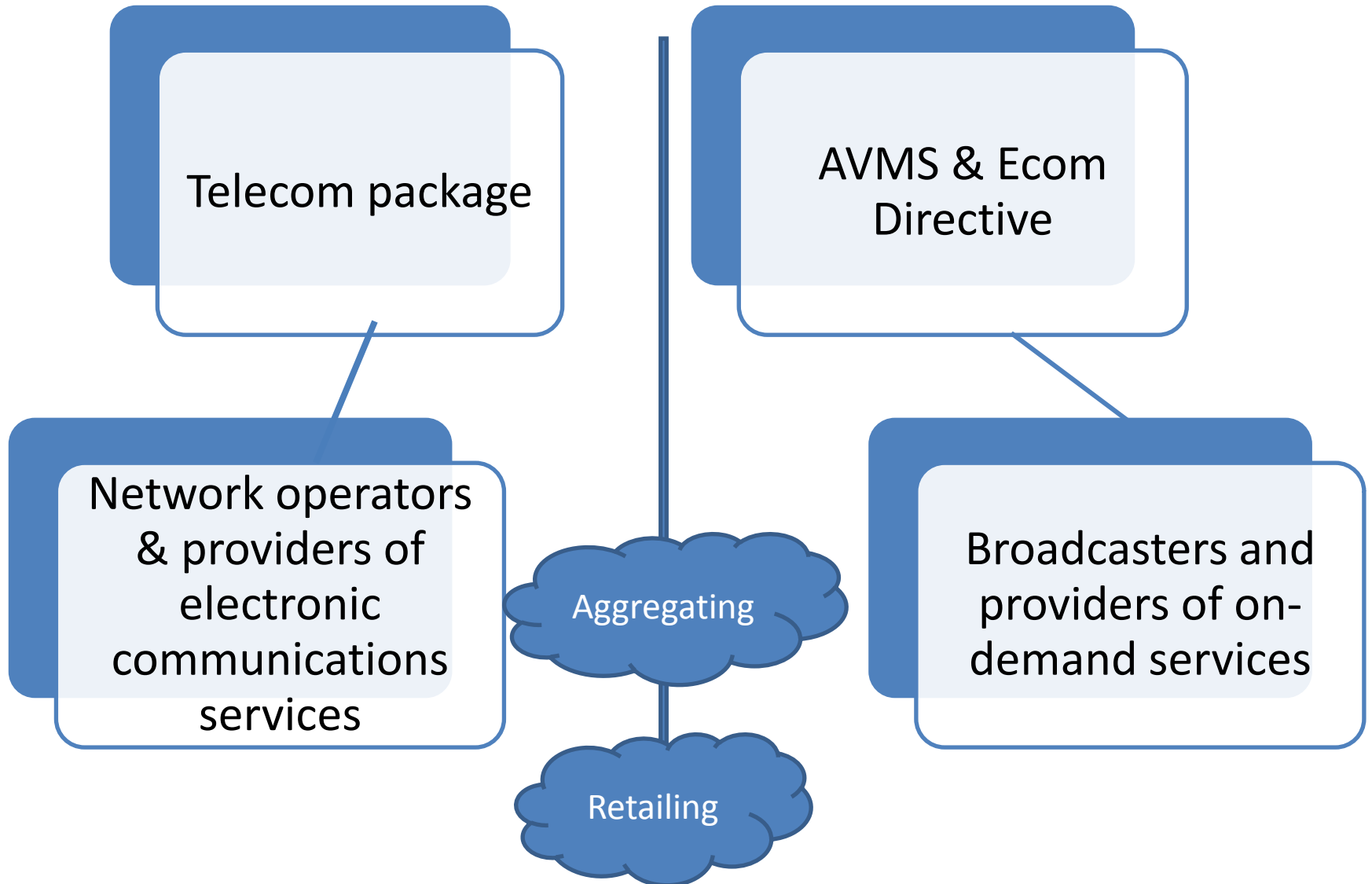


The case of mobile TV and HD TV

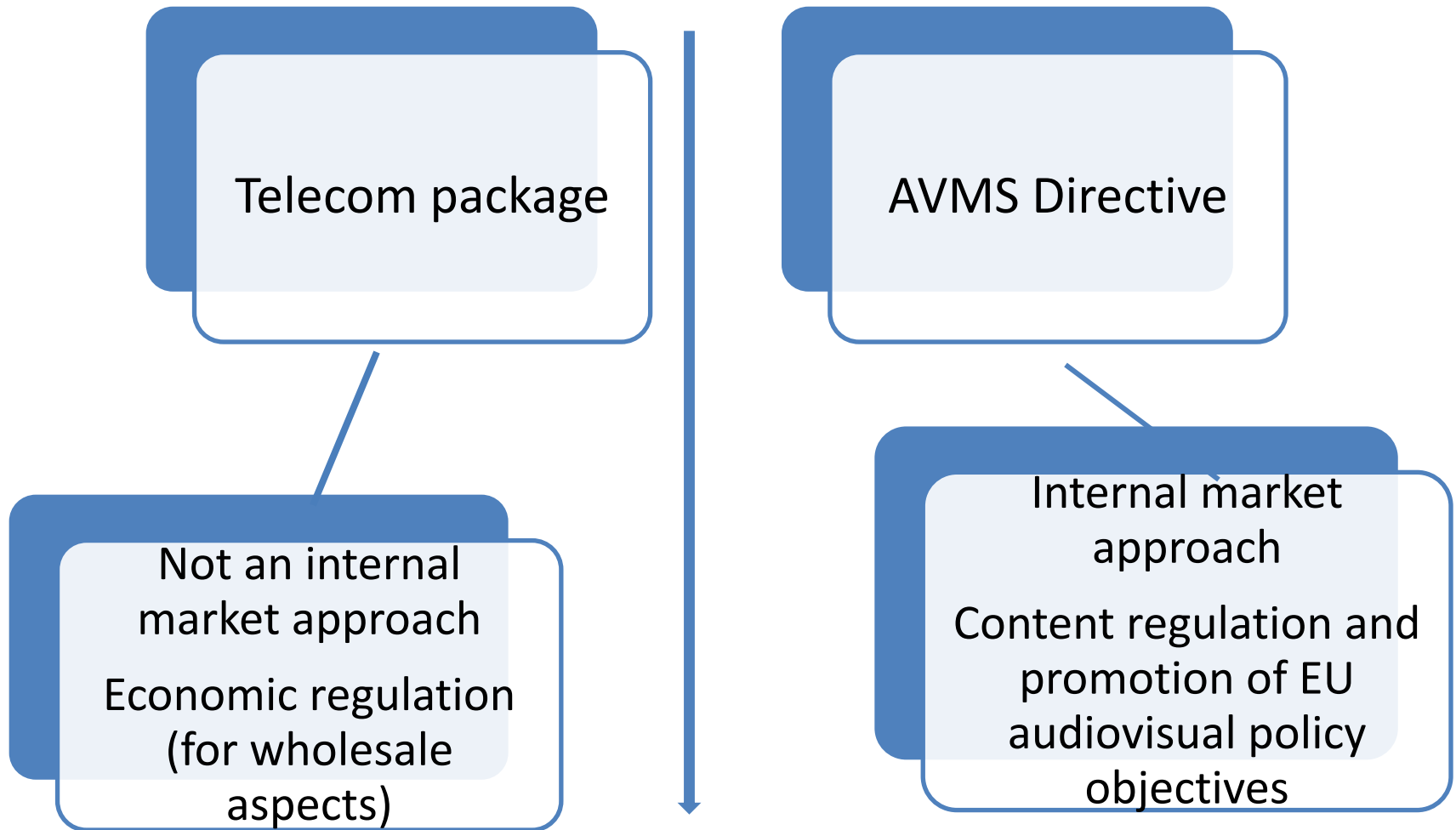
# EU regulatory framework



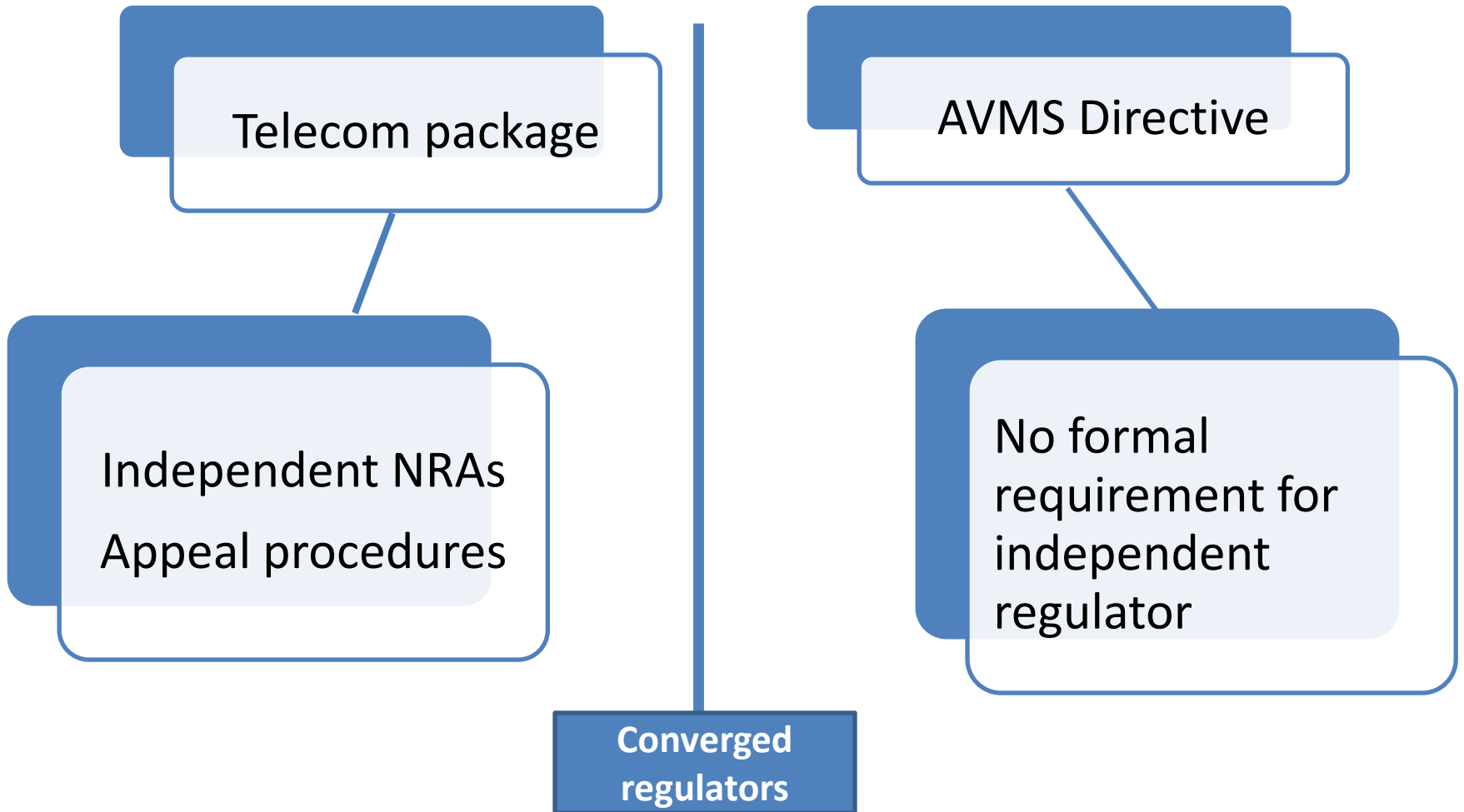
# EU regulatory framework



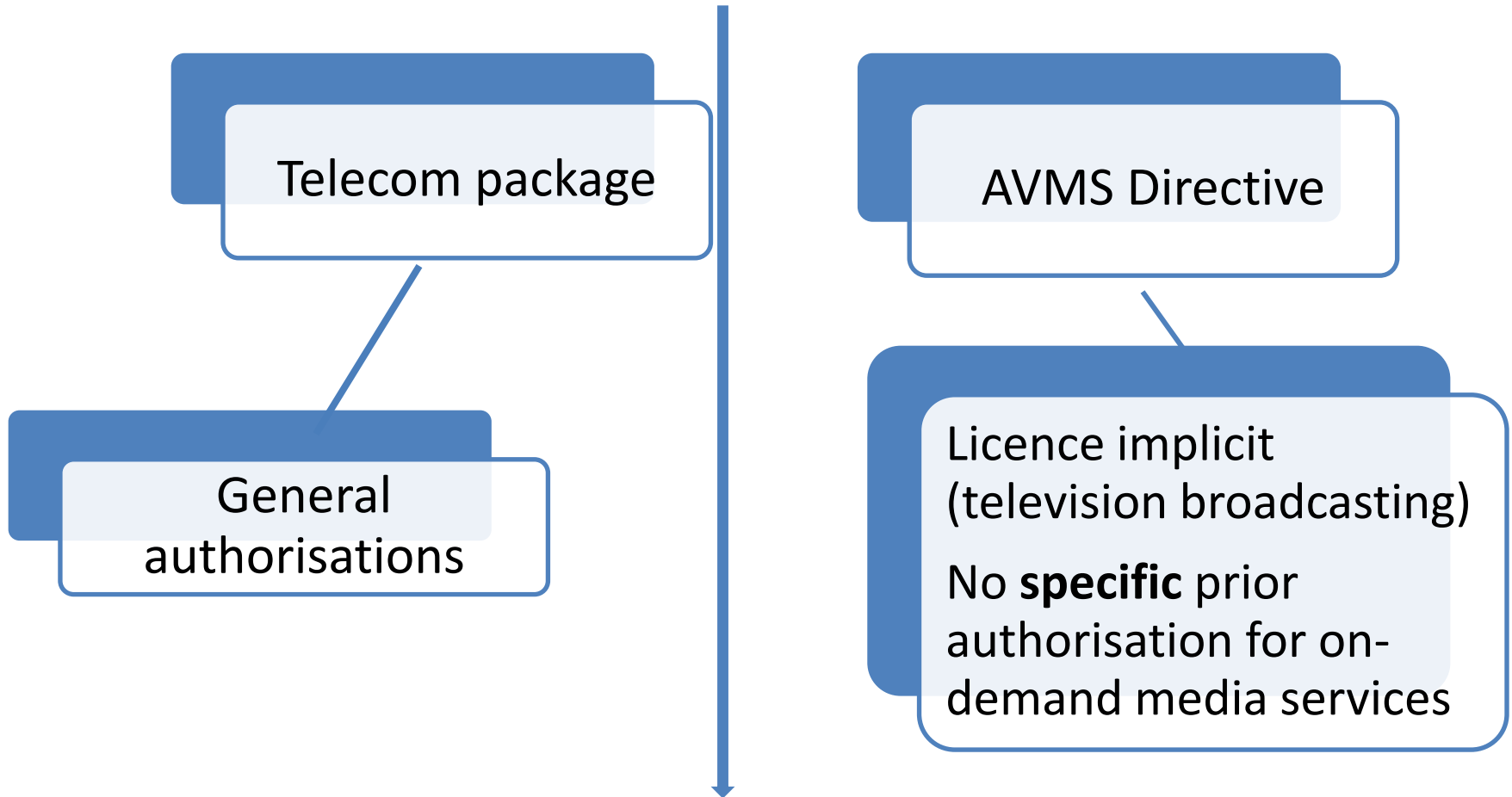
# EU regulatory framework



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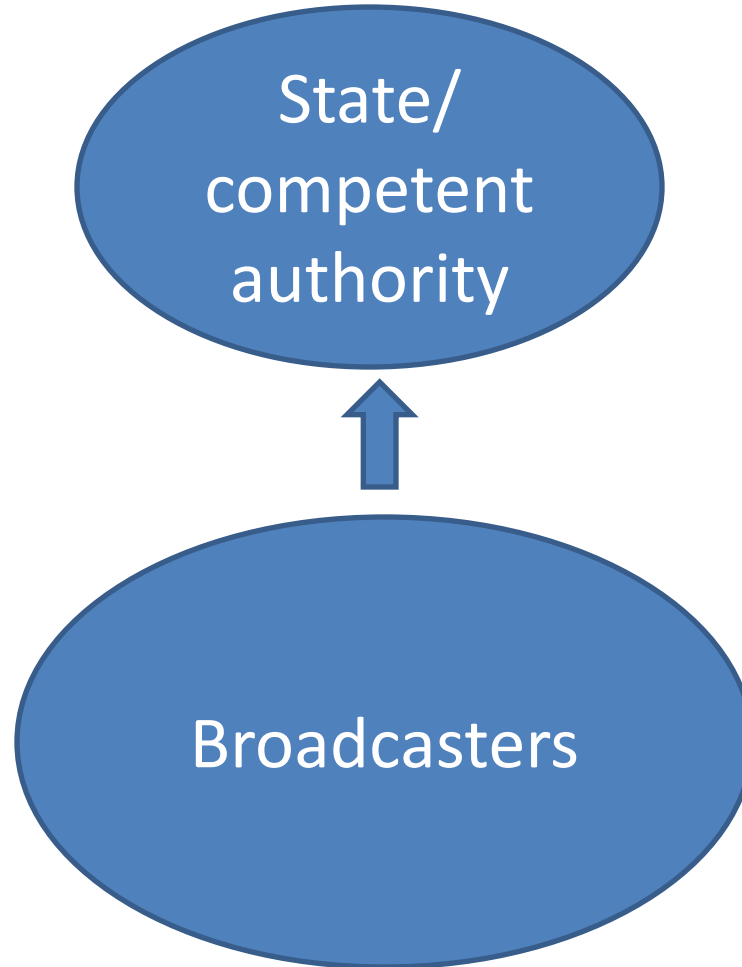
# Powers of Member States and of national regulators

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

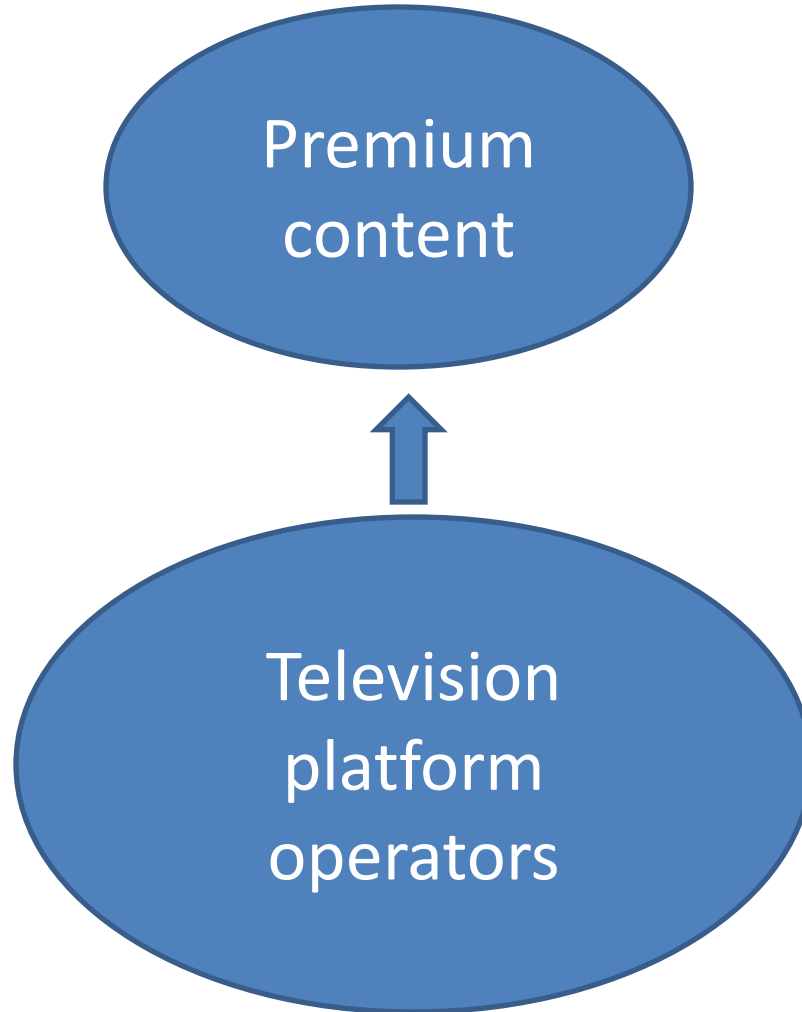
- Italy
- Finland
- UK
- France

## 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

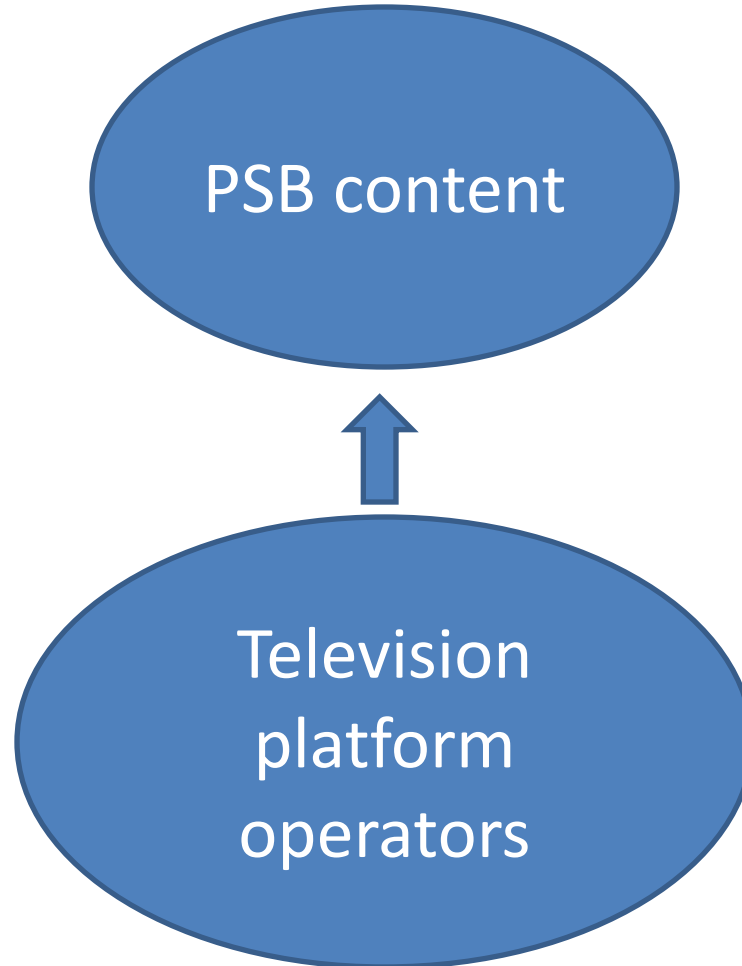
Legislation (e.g. must offer)

Power of the regulator

IPR licensing

Windows

# Untouched areas: PSB new services



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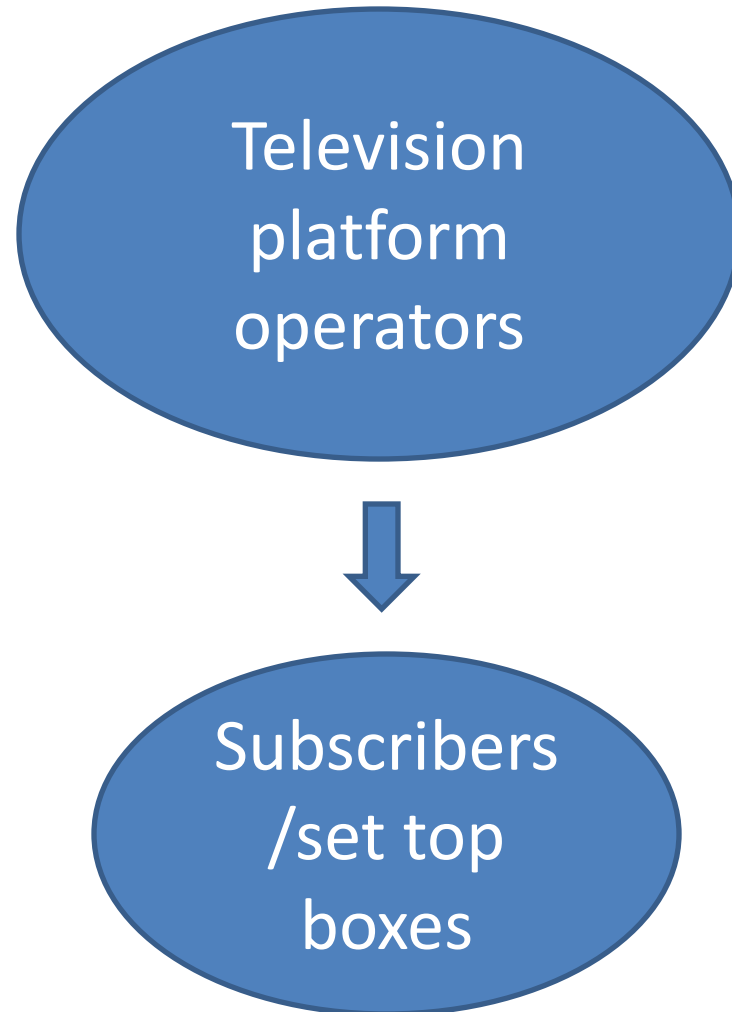
EU state aid scrutiny

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PSB remit for  
presence on  
distribution  
platforms

Ex ante test  
for new  
services (DE,  
UK)

# Untouched areas: relationship with subscriber

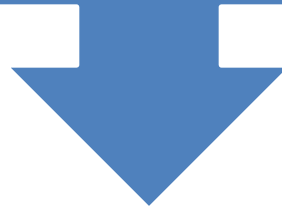


# The case of new converged services: mobile TV

- 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. 2008
- 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