

Defining Broadcasting Services in Times of Media Convergence

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The Future of the Broadcasting License Fee Köln,

Köln, 6.5.2010

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Dimensions of Media Consumption today





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Categories of CE-devices for media consumption Examples from a consumer perspective



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Categories consist of multiple classes from Budget \rightarrow Premium





Boundaries between device categories blur



Diversity of devices will increase rather than decrease Device selection depends on usage context – and design(!)



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Example for "Convergence Devices": TV-Sets





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Digitale Distribution Links for Media in Europe

Telecommunications fixed networks			IS	DN	ADSL	
Broadband (coax) cal	ole		Analog	g TV		ital TV Next /B-C) Seneration (DVB-C2)
Satellite			Analog	TV	Digital TV (DVB-S)	
Hotspot					WLA	N Bluetooth WIMAX
Telecommunications Mobile networks	;			GSM	UMT	Broadcast LTE S Mode
Terrestrial	Analog TV (PAL)				Digital TV (DVB-T)	Mobile TV Next (DMB, Generation DVB-H) (DVB-T2)
Analog Ra (MW, FI				Dig	gital Radio (DAB)	Multimedia Radio (DAB+ / DMB-Radio)
1930 1940 19	950 1960	1970	1980	1990	2000	2010





Networks evolve towards "general purpose" networks

All services over ONE network: telephone, Internet and broadcast (TriplePlay)



Network operator becomes the service provider, who:

- controlls all services offered
- has the direct relationship to the customer
- delivers service over owned managed networks





Mobile Networks as Universal Network?

Evolved from voice to a data network

Bandwidth grew rapidly (from GPRS to LTE)

Today up to 14.4 Mbps

data flat rate established

• "free" Internet acce



... there is much more to consider Media offers over than just technology!

- iPhone Radic
- on demand media streaming

Mass distribution of media

Bundesliga offered by T-Mobile



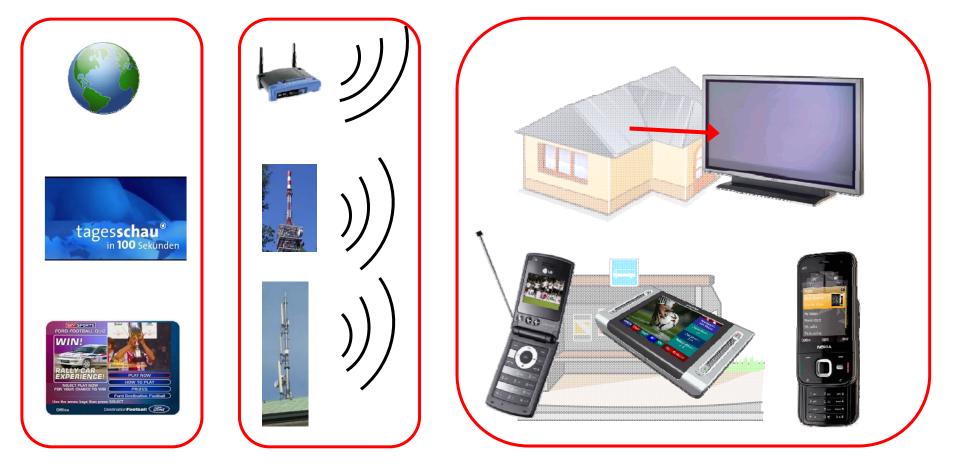






Fixed-Mobile Convergence of Media

Will be accelerated by utilizing the "digital dividende"





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Traditional Broadcast Services: self evident and simple



Radio and TV is more than AV:

- additional information
- complementing services

One outlet to the network: Consumer does not care about a particular network

Dedicated device for broadcast services Very(!) simple usage

- Reliable
- High technical AV quality
- At home and on the move





Services are offered linear and non-linear



- Live program will continue to play an important role,
 - ... but non-linear offers complement the service portfolio
 - ... the customer will be reached over all distribution means





Media shapes the Internet

>> 50% of data traffic in network originates from media











kicker.tv: Über

aschungs-Transfer - Schalke ho





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CE-Manufacturers eye new business opportunities

- CE is the driver, independent of broadcast
- CE-industry follows similar concepts but with proprietary technical approaches





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Apple and Google are entering the TV-market



- itunes media portal
- Exclusive content contracts

- TV ads
- TV search
- Personalization?



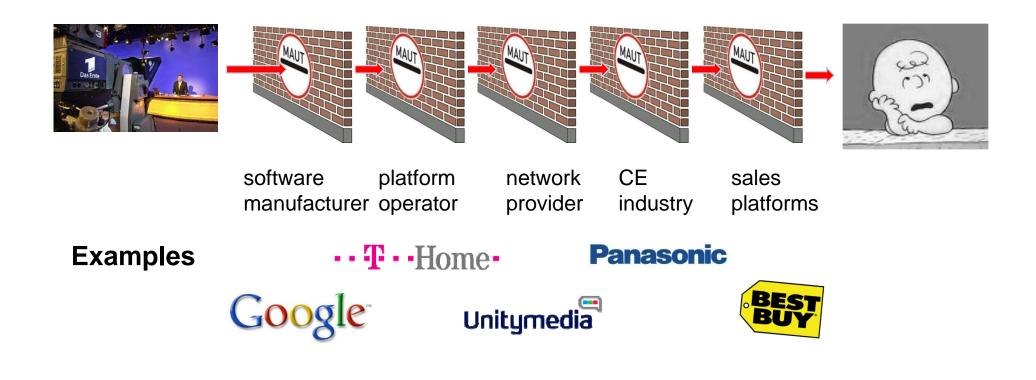








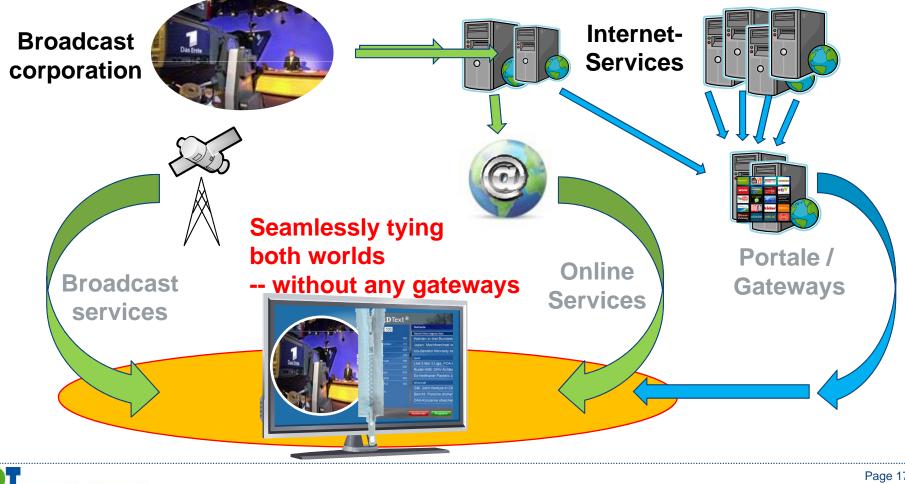
Broadcasters face more and more toll stations







Hybrid-TV – a new Paradigm seamlessly tying linear and non-linear services together



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First Application Scenario (ARD)

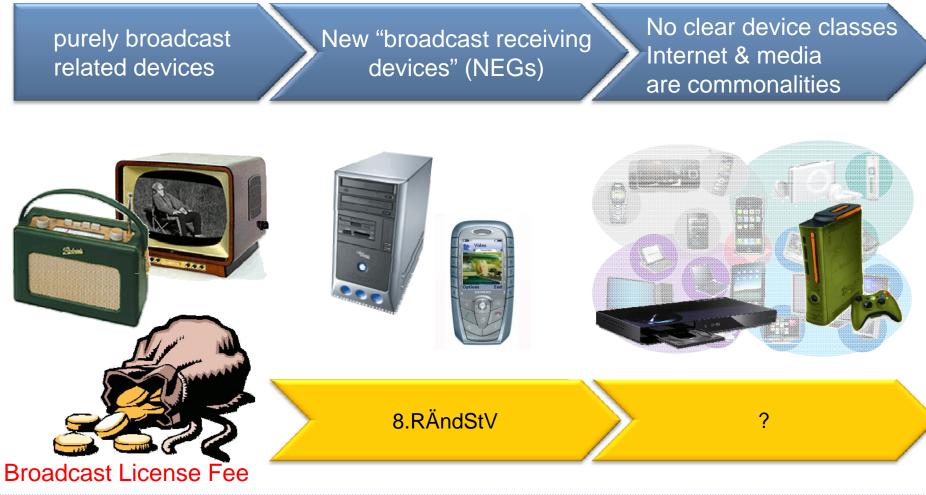
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- Intuitive branching from linear program to non-linear program elements
- maintain homogeneous brand and seamless experience





Consequences for Broadcast License Fees?





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Conclusions

Device heterogeneity increases AV-media becomes a commodity feature

Boundaries between linear and non-linear service blur Broadcast services are much more than just AV-media

The national broadcast market gets competition from global companies

- portals & search rather than program lists
- service offerings combine media, communities, communications
- Ioss of ownership of screen

For broadcasters strong brands become vital requires attractive and competitive services in the market





Thank you for your attention!

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