Defining Broadcasting Services in Times of Media Convergence

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Dimensions of Media Consumption today

Categories of CE-devices for media consumption

Examples from a consumer perspective


Mobile phones


Radio


Set top box


TV-Set


mp3-Player


Digital camera


HomeMedia Center


game consoles


Home stereo


CD/DVD-Player


Computer


navigation devices


… and many more

Categories consist of multiple classes from Budget → Premium

- Differentiation via <u>feature sets</u> (check-box)
- Media (not broadcast) is a core feature

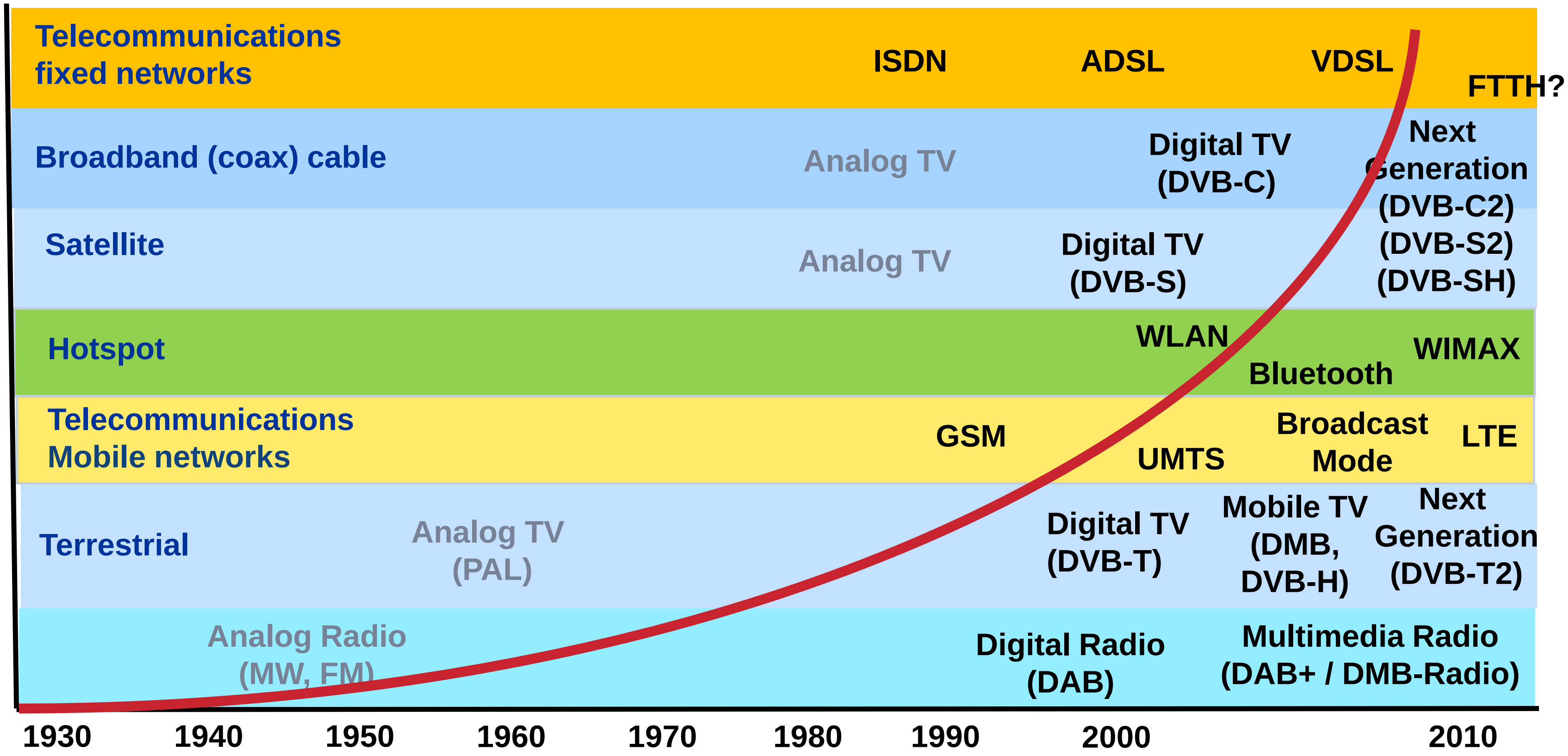
Boundaries between device categories blur

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

Example for „Convergence Devices“: TV-Sets

Broadcast | Internet | DVD/BD | Mediathek | Games | Home Media | Communication | HomeControl

Digitale Distribution Links for Media in Europe



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 establishe

- „free“ Internet acce

BUT…

Media offers over

… there is much more to consider than just technology!

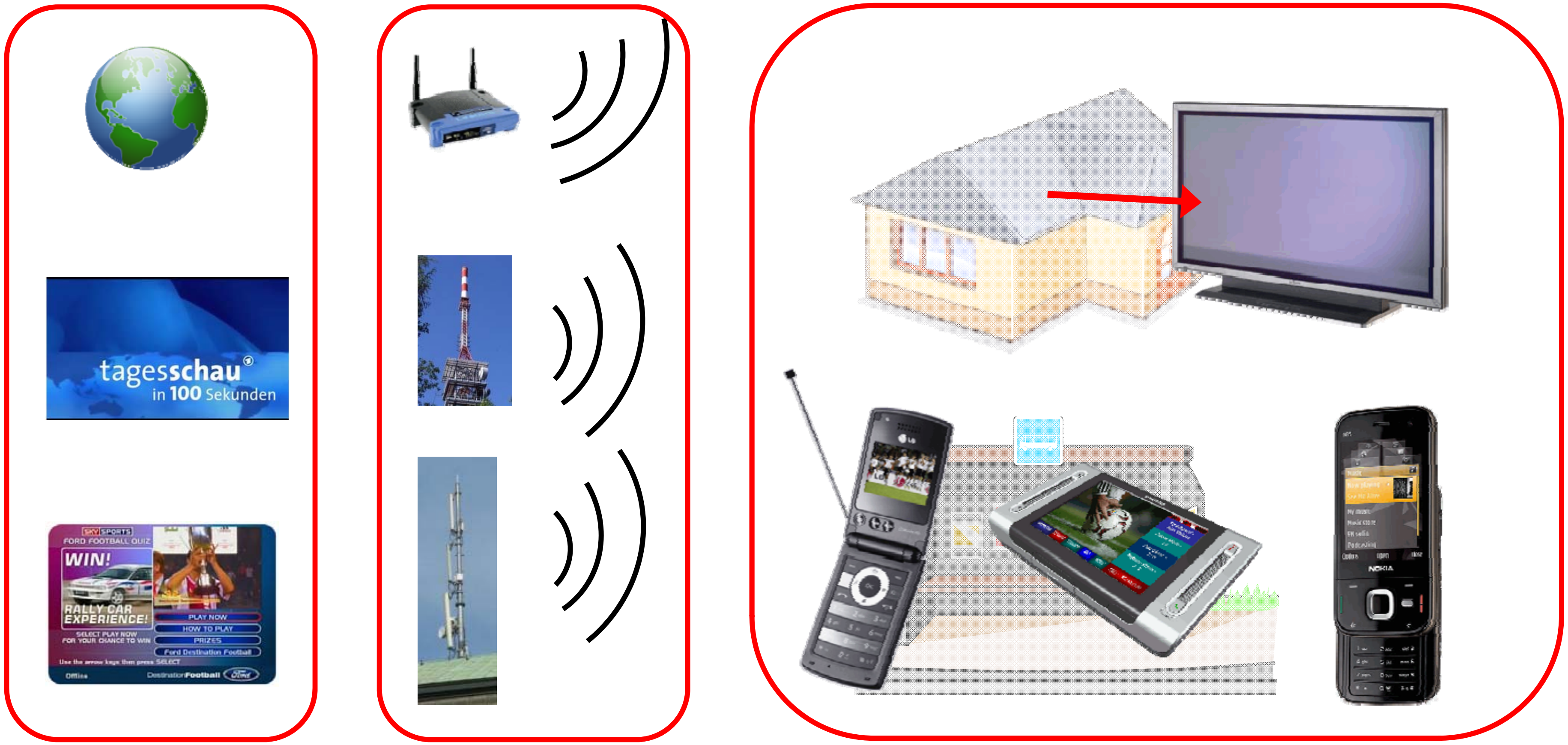
- iPhone Radic
- on demand media streaming

Mass distribution of media

- Bundesliga offered by T-Mobile

Fixed-Mobile Convergence of Media

Will be accelerated by utilizing the „digital dividende“



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

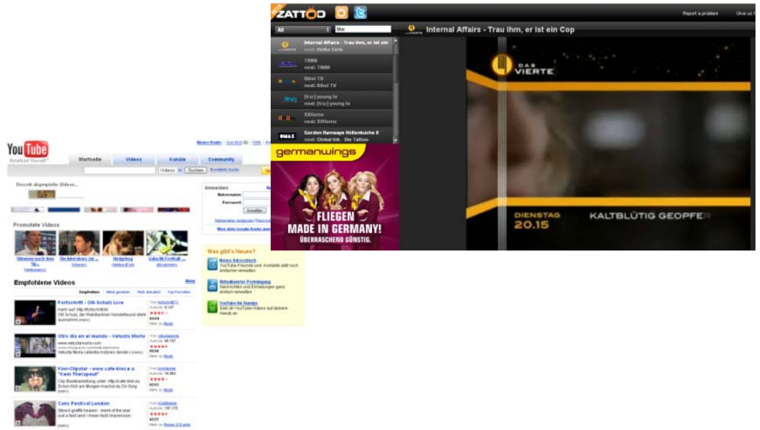
- Reliable
- High technical AV quality
- At home and on the move

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



CE-Manufacturers eye new business opportunities

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

Panasonic VIERA CAST

PHILIPS NetTV

SAMSUNG YAHOO! Widgets

SHARP

SONY

LOEWE.

HUMAX

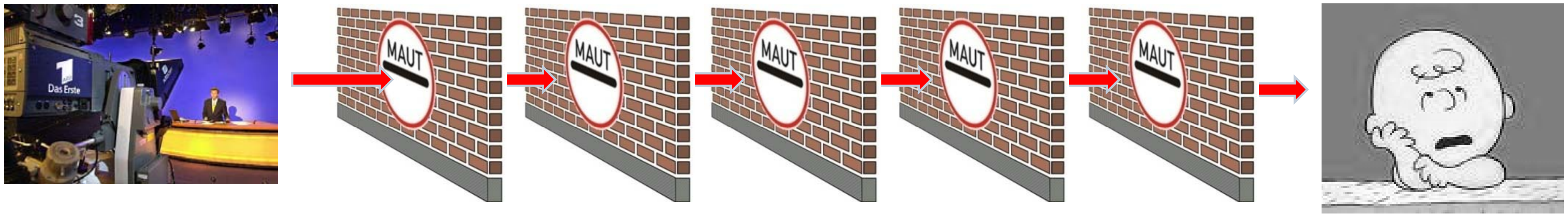
VIDEOWEB

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



software manufacturer

platform operator

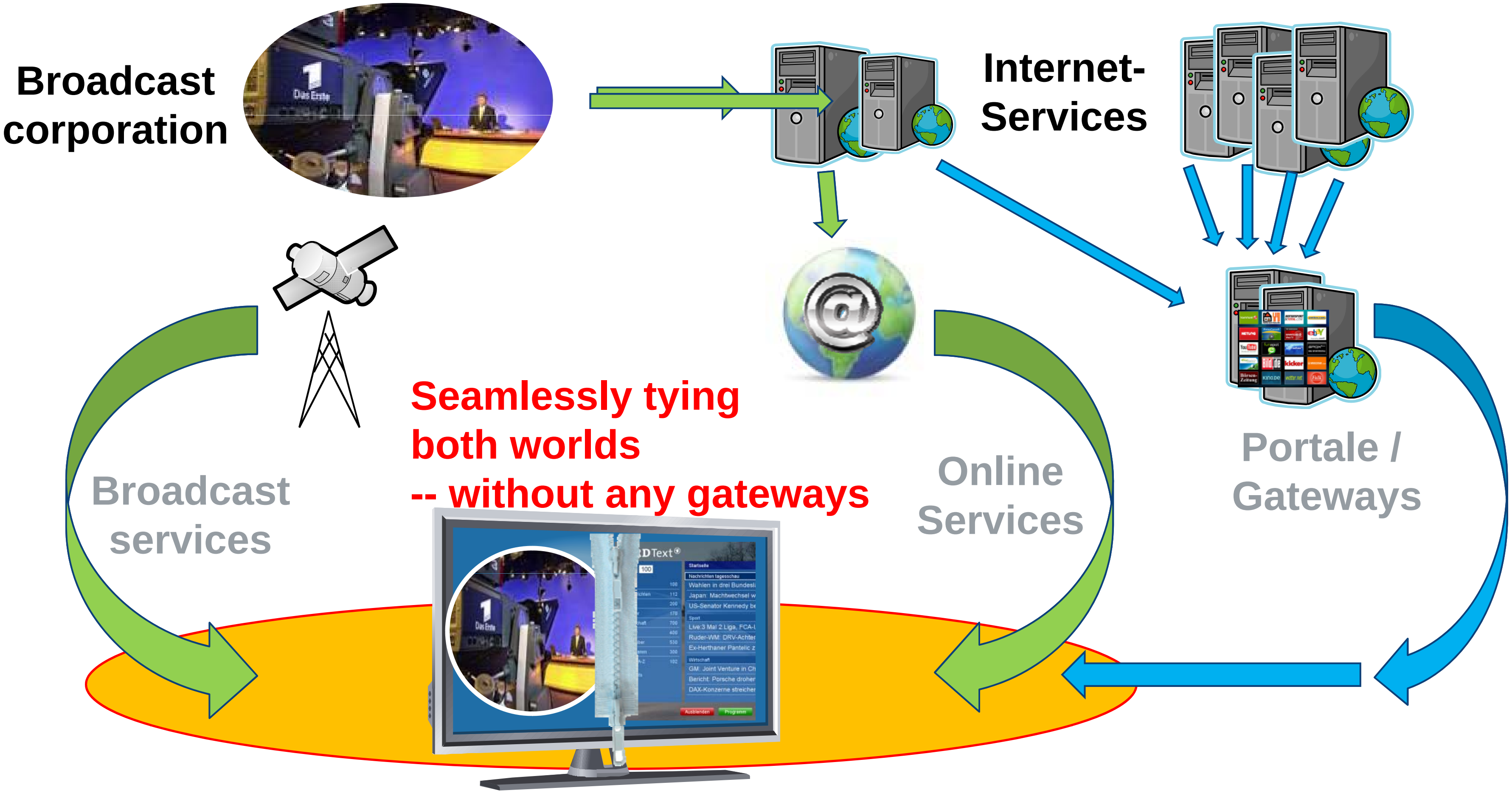
network provider

CE industry

sales platforms

Examples

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



First Application Scenario (ARD)

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

Consequences for Broadcast License Fees?

purely broadcast related devices → New “broadcast receiving devices” (NEGs) → No clear device classes Internet & media are commonalities

Broadcast License Fee

8.RÄndStV → ?

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
- loss 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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