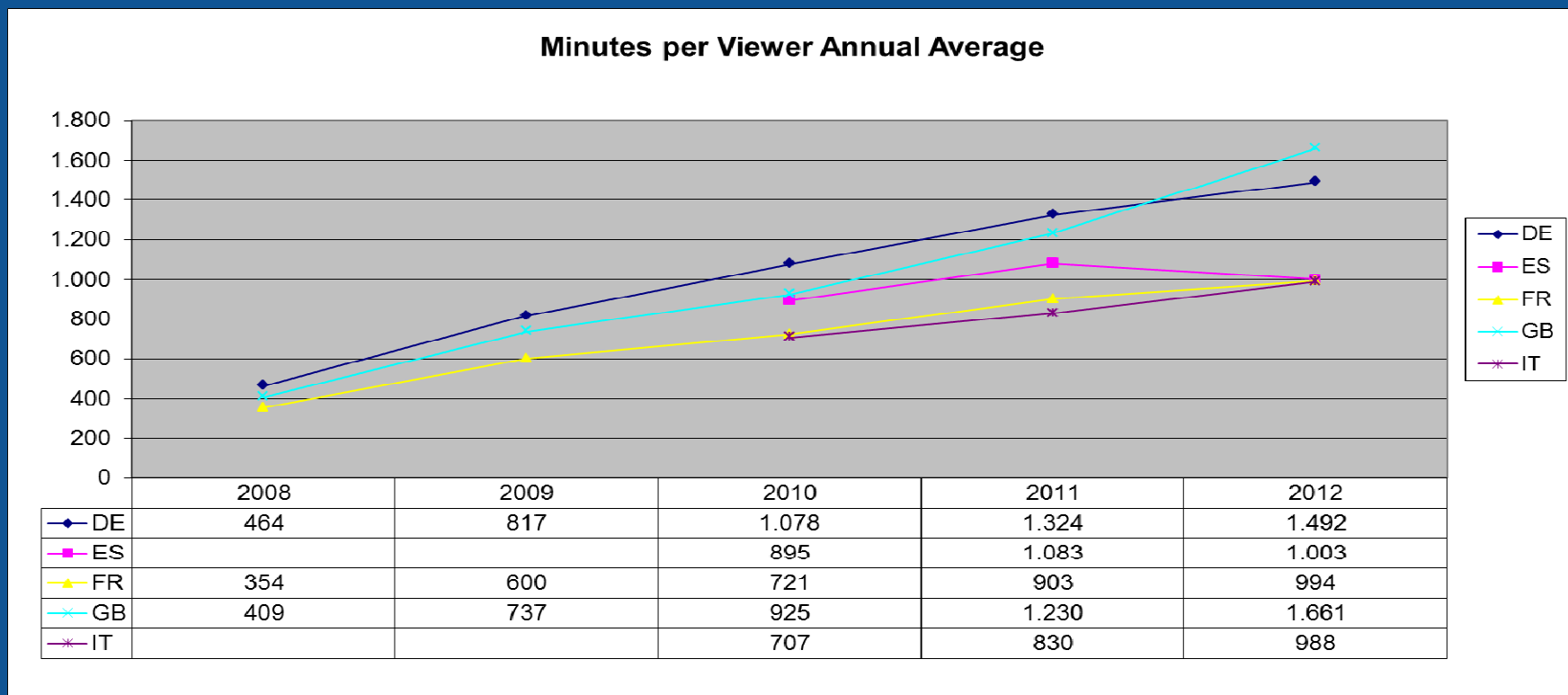




# Convergence of Media

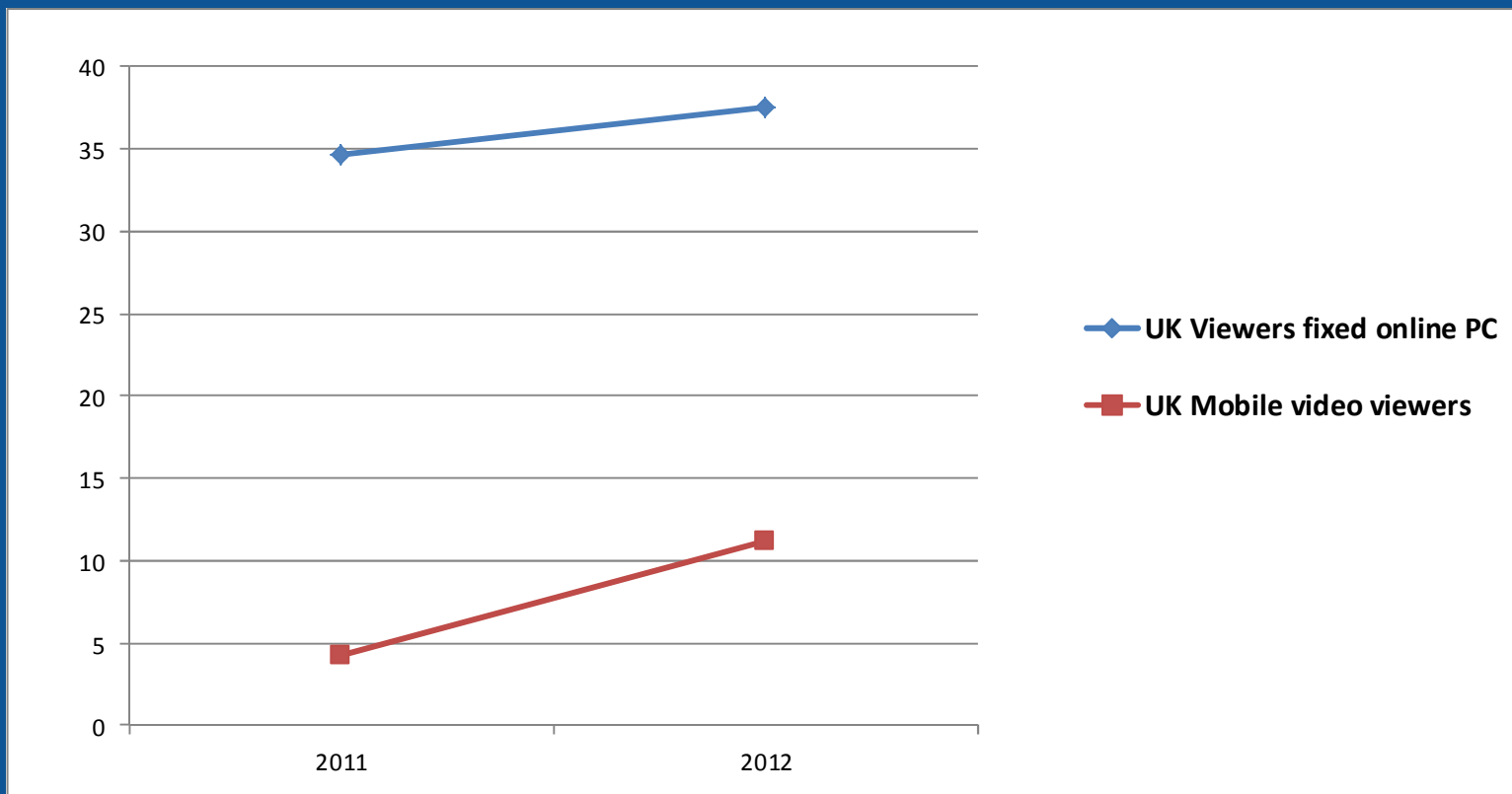


# Online audience of streaming video on fixed lines – watching time



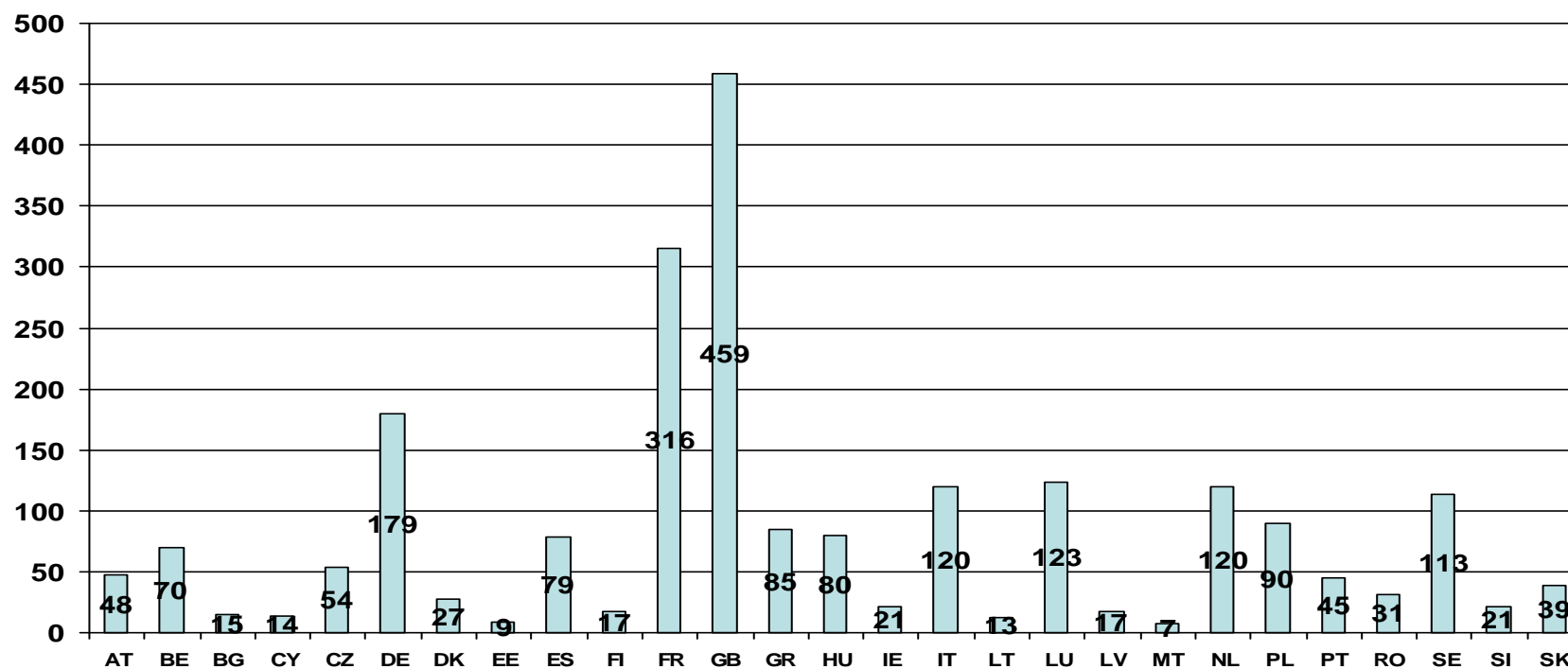
Source: comScore - European Audiovisual Observatory

## Viewers of mobile video outpaced the growth of viewers on fixed lines – the UK case



Source: comScore

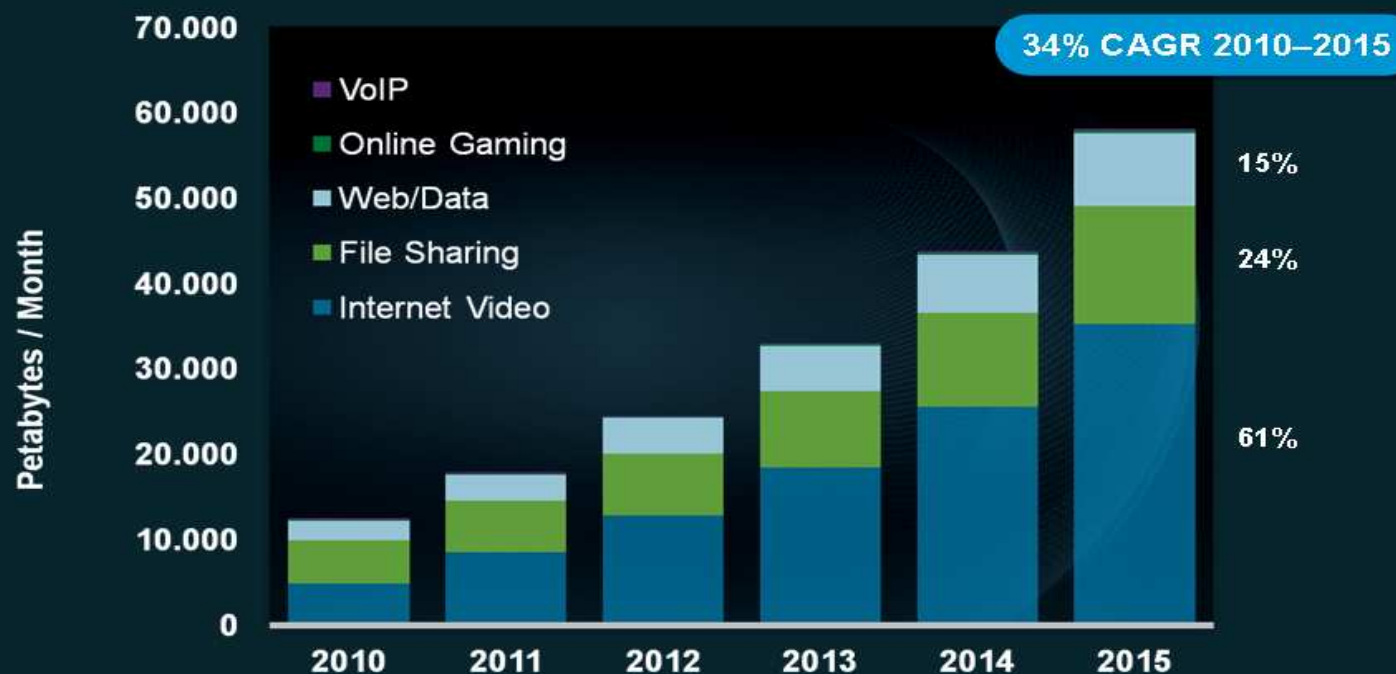
## At least 2293 Video on demand services were established in the EU as of end 2012



Source: European Audiovisual Observatory

# Global Consumer Internet Traffic / Applications

## Internet Video dominates consumer Internet traffic



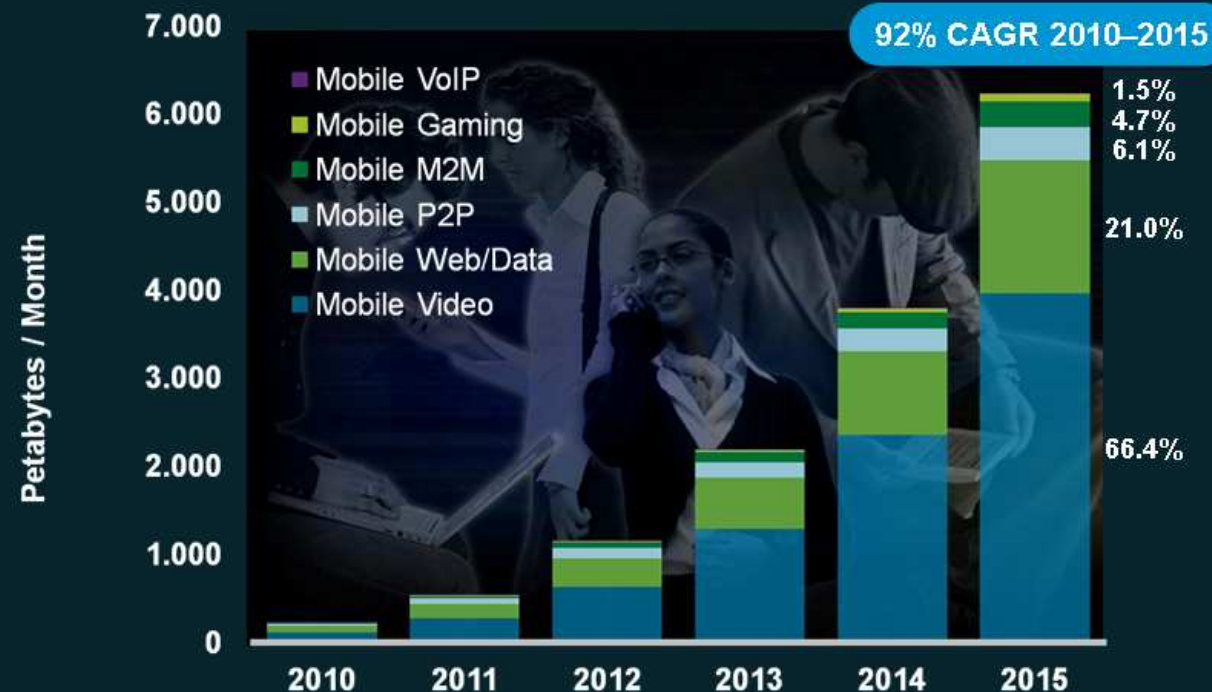
Online Gaming and VoIP forecast to be 0.79% of all consumer Internet traffic in 2015

Source: Cisco Visual Networking Index (VNI) Global IP Traffic Forecast, 2010–



## Not Just Fixed: Global Mobile Data Traffic

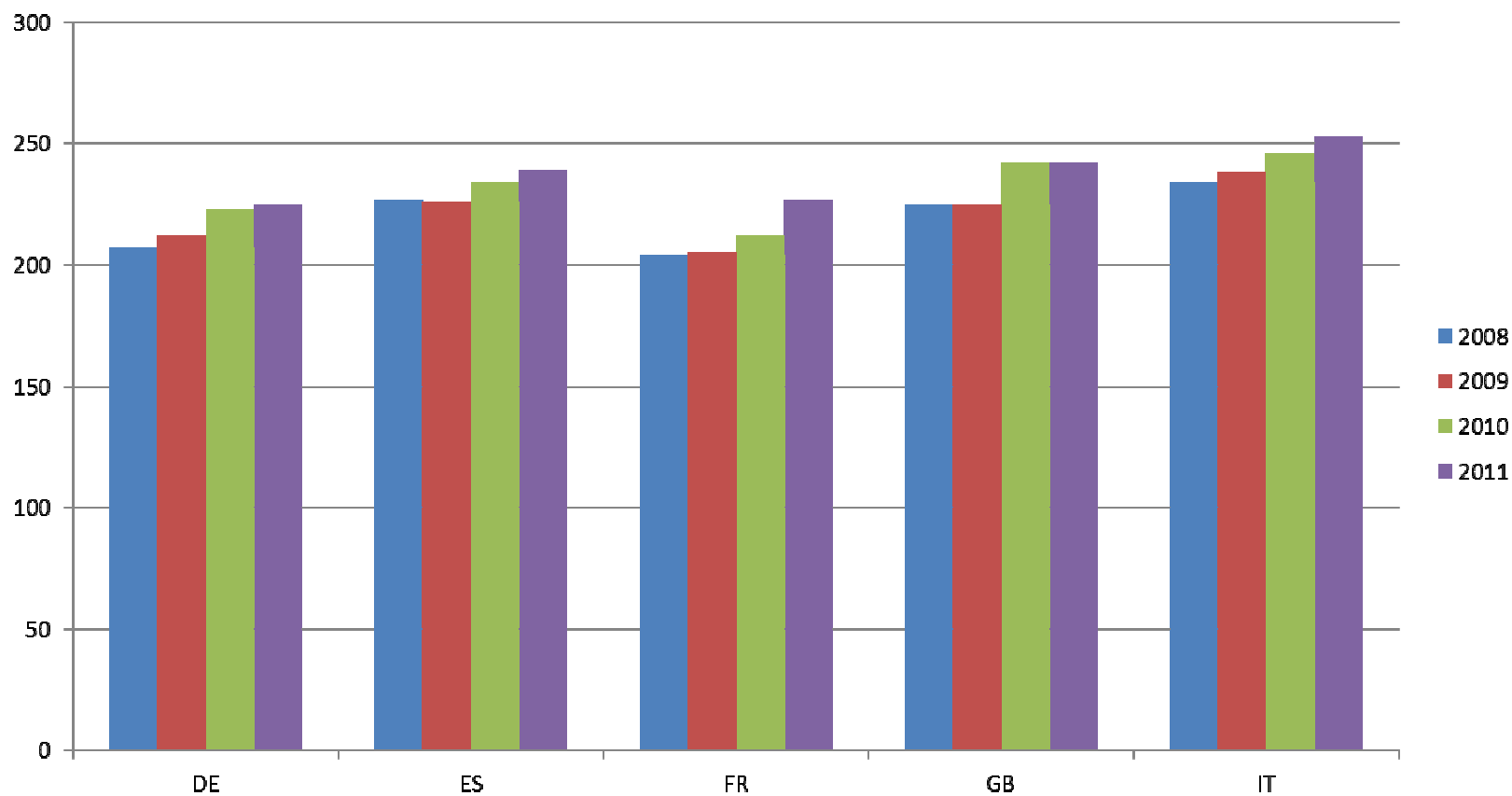
Video to reach more than 50 percent of mobile data traffic by 2011



VoIP traffic forecast to be 0.4% of all mobile data traffic in 2015

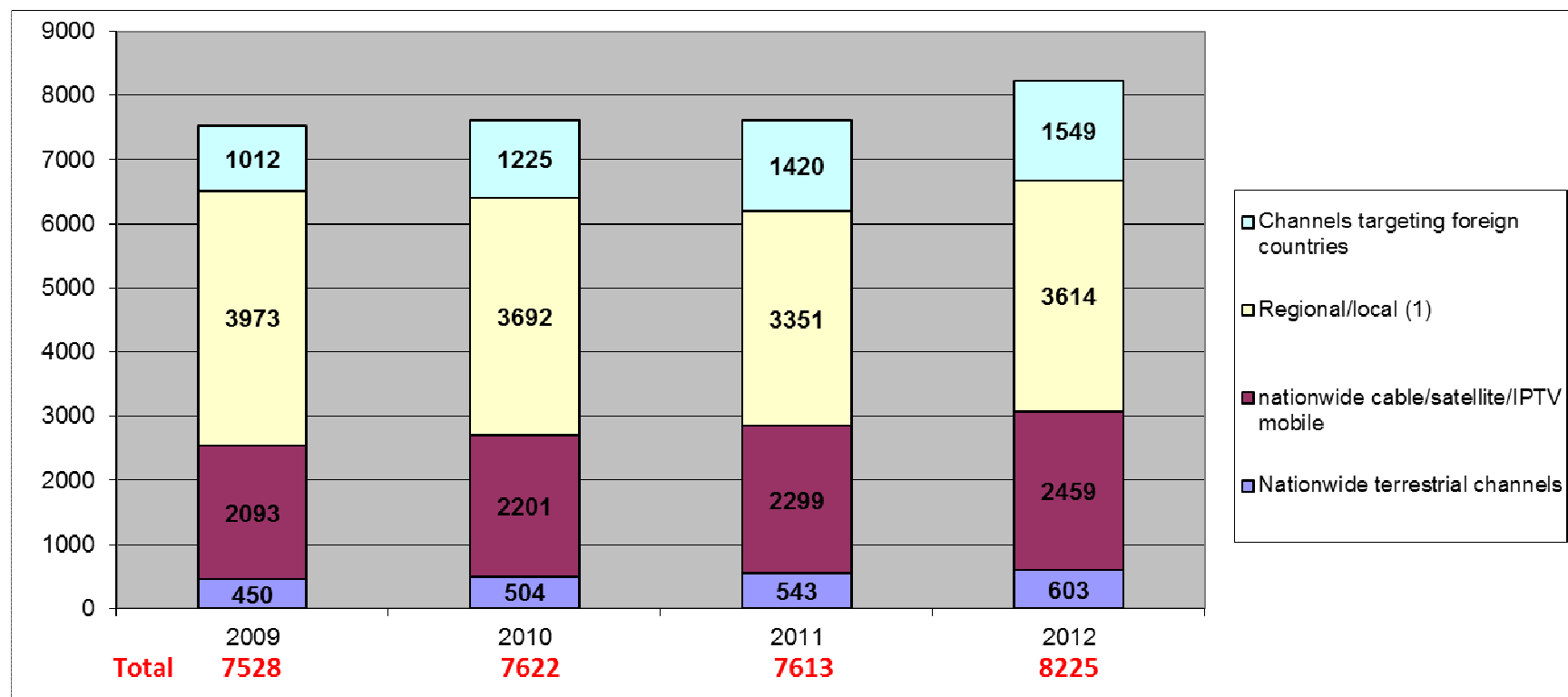
Source: Cisco Visual Networking Index (VNI) Global Mobile Data Traffic Forecast, 2010-2015

# Daily average TV viewing time (minutes)



Source: European Audiovisual Observatory

## Number of channels established in the EU (2009-2012)



Source: European Audiovisual Observatory

# What convergence really means...

- Traditional broadcast services and over the top content on the same screen (TV set or mobile device)
- Parallel usage of a second screen device
- Connexion between the mobile device and the TV set
- And who knows what the future will bring...



# **Ingredients for growth are familiar**

- Scale – Network effects
- Attractive content to attract an overloaded viewer
- Interoperability
- New financing models?
- A regulatory framework that guarantees values

# A possible regulatory debate

- More or less regulation?
- Key concepts:
  - Linear vs. non-linear
  - “audiovisual media service”
  - jurisdiction

## **Another way to see this debate**

- What are the values we want to protect?
- What is the best way to achieve it?

# Links with the telecom framework

- Spectrum
- Article 31 USD (must-carry rules)
- Article 6(4) Access Directive



European  
Commission

