

EPRA33

WG3 on Spectrum

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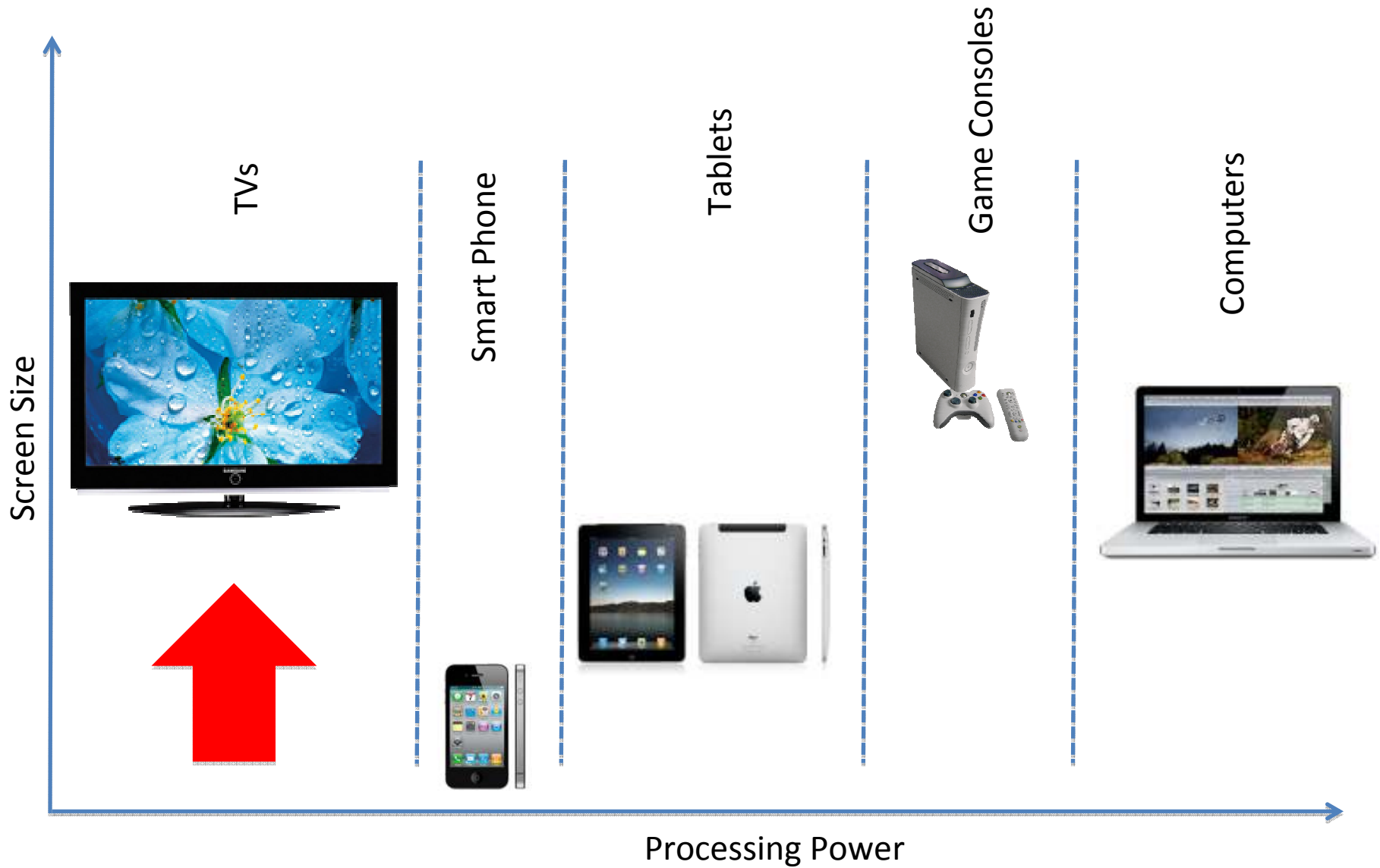
26th May 2011



Painting a picture

- In a future world, the consumer will control what he/she watches
 - Recommendations from friends, etc.
- What is watched will depend on the device and “viewing situation”
 - Mobile, Fixed, Personal.
- This will require a plurality of devices and access networks

Devices receiving PSB content?



Broadcasters Broadband

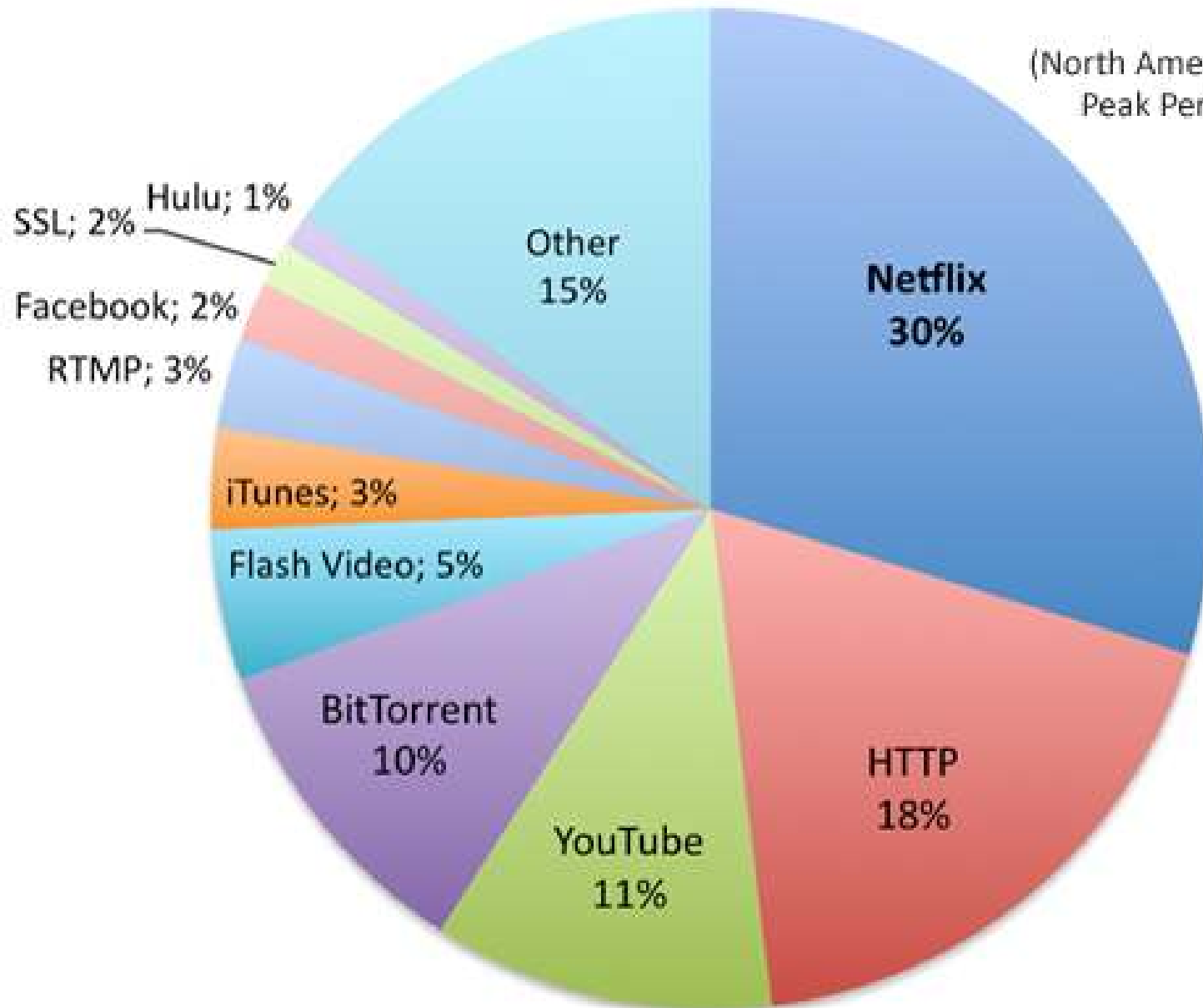


- Broadcasters are some of the biggest users of broadband
 - BBC's iPlayer consumer c.15% of Internet traffic in UK
- To address quality issues with European Internet infrastructures, broadcasters are major innovators in this area
- Wireless broadband is an integral part of a broadband offering



Top Applications By Downstream Bytes Share

Source: sandvine
(North America; Fixed Access;
Peak Period - march 2011)



Wireless Broadband & Spectrum

- Increased public scrutiny of the use of spectrum will improve its efficiency
 - Analogue Switch-off will be completed by 2012-2015
 - 2G networks should all be migrated to 3G/LTE
- Broadcasting and Broadband have to co-exist
 - Interference issues are non-negligible but can be addressed in partnership
- Wouldn't it be great if we could all innovate on wireless broadband networks as well?

Can Wireless Broadband replace Broadcasting?

- Public Service Broadcasters have a universal coverage obligation
 - Terrestrial broadcast networks address this obligation efficiently
 - Broadcasters pay lots of money for distribution
- Current proposals for wireless broadband appear to reinforce today's economic models
 - Broadcast network operators and service providers have been separated for some time

Can Wireless Broadband replace Broadcasting?

- Were wireless broadband networks to
 - address universal coverage,
 - employ a FTA model and
 - be competitively priced

Why not!

- Unfortunately, we don't see this happening anytime soon.

Conclusions

- Content Providers account for substantial traffic on all access networks
- Future is hybrid
 - Content/Applications
 - Networks
 - Devices
- Wireless Broadband is an integral part of this strategy
- So is a vibrant terrestrial broadcast network industry
- Let's work together to ensure that the vitality of both is assured



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