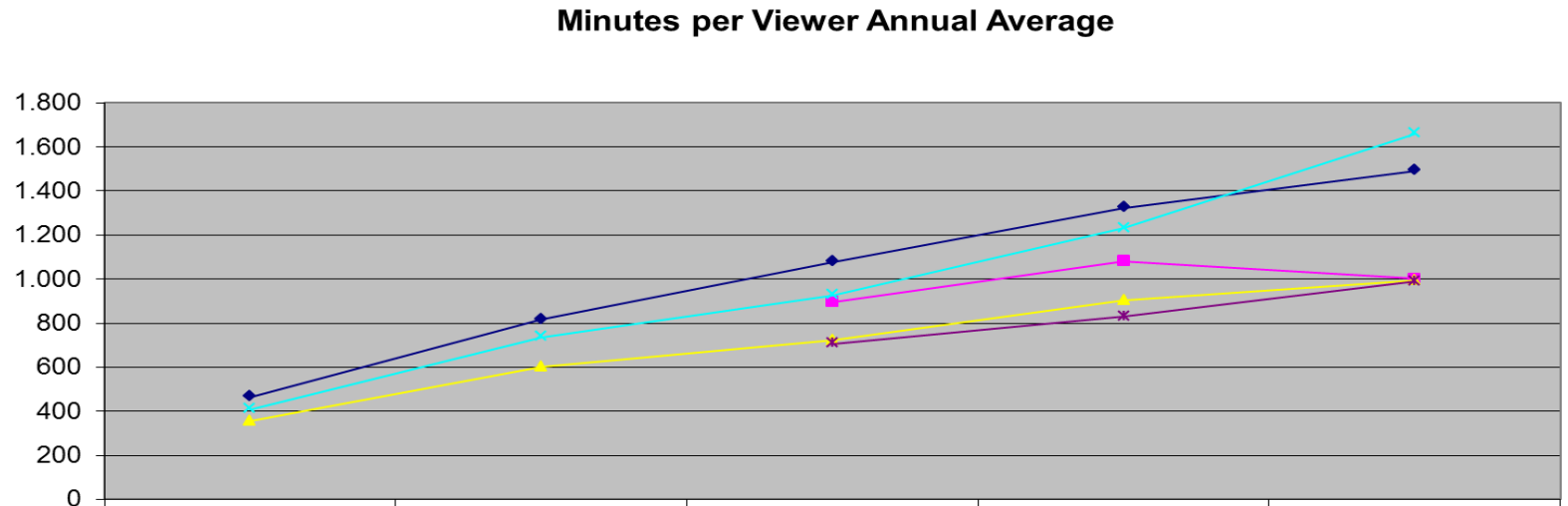
European Commission

Convergence of Media

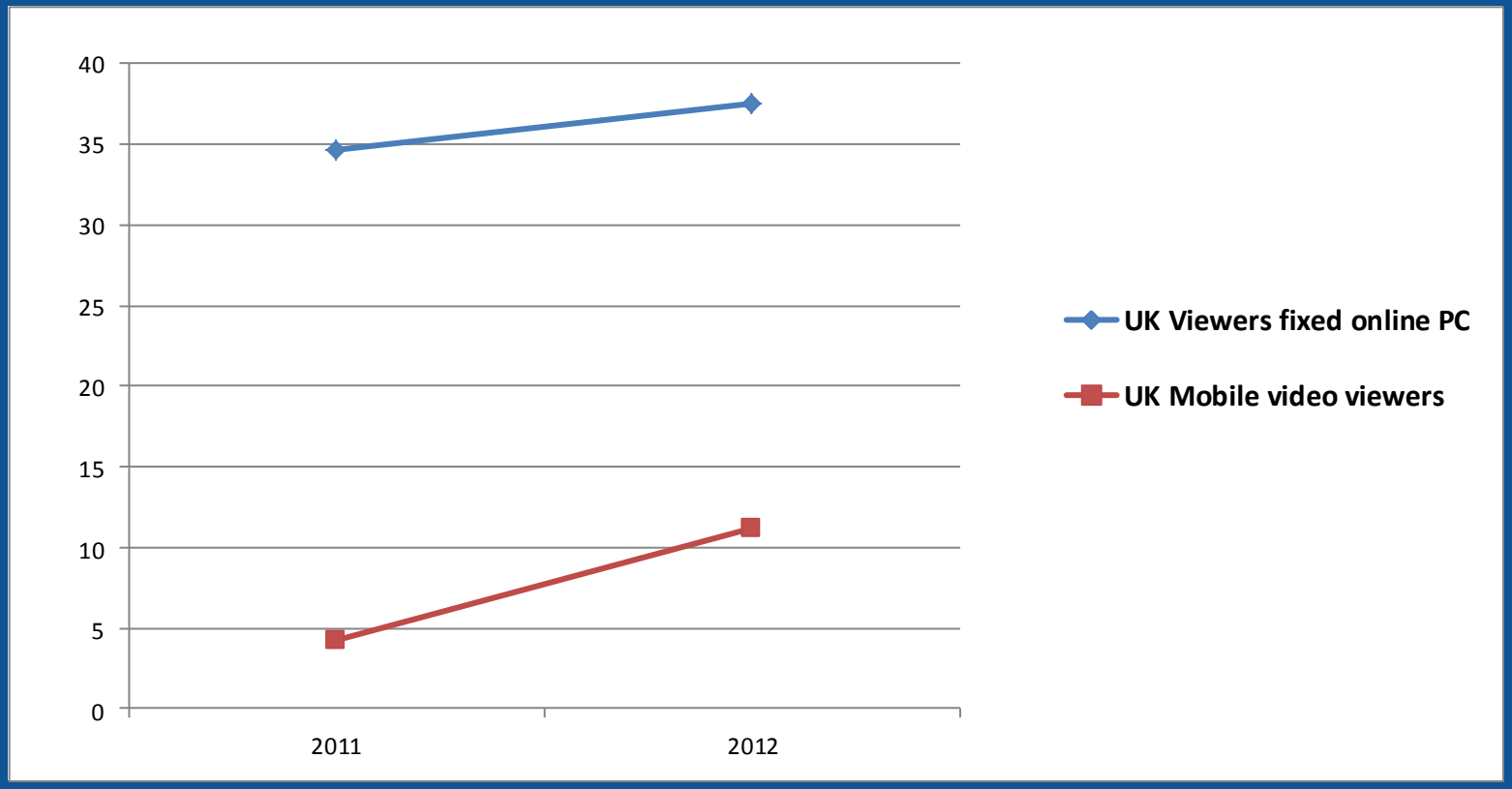
Online audience of streaming video on fixed lines – watching time



	2008	2009	2010	2011	2012
DE	464	817	1.078	1.324	1.492
ES			895	1.083	1.003
FR	354	600	721	903	994
GB	409	737	925	1.230	1.661
IT			707	830	988

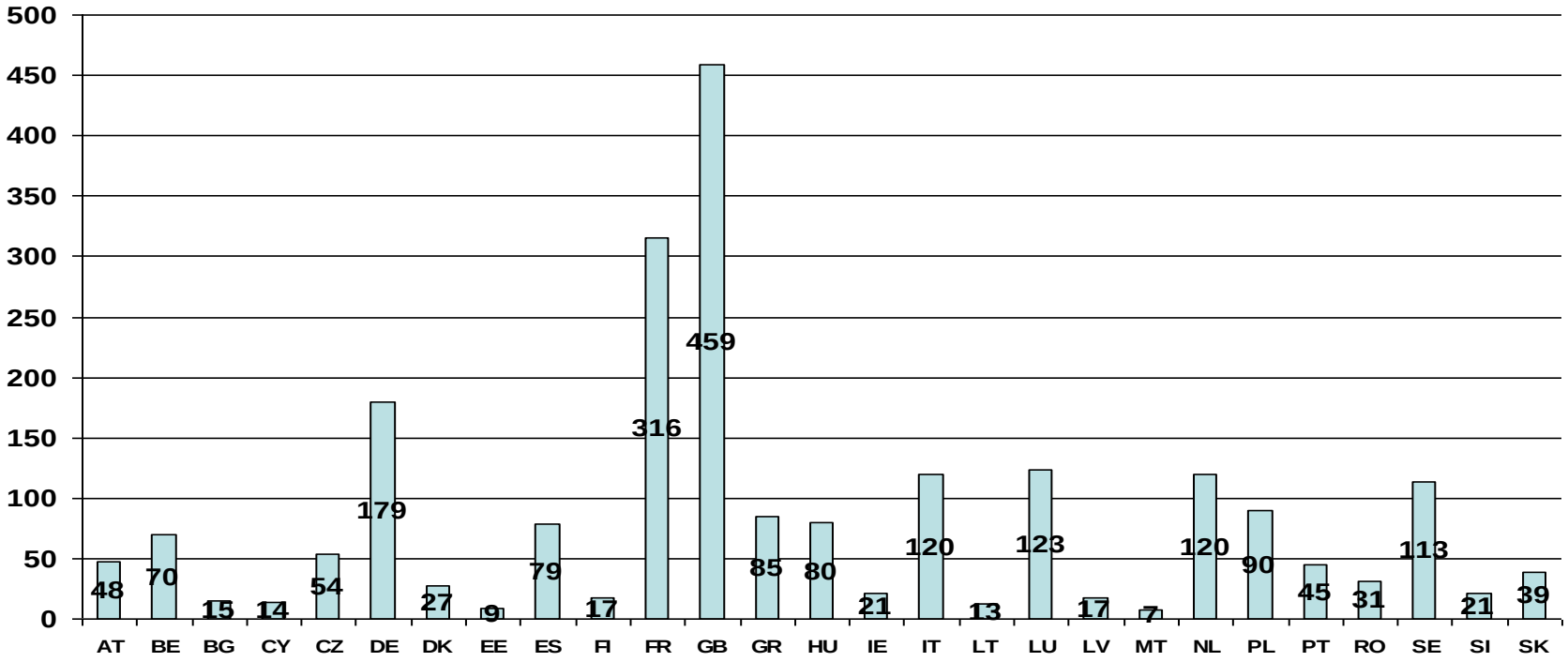
Source: comScore - European Audiovisual Observatory

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

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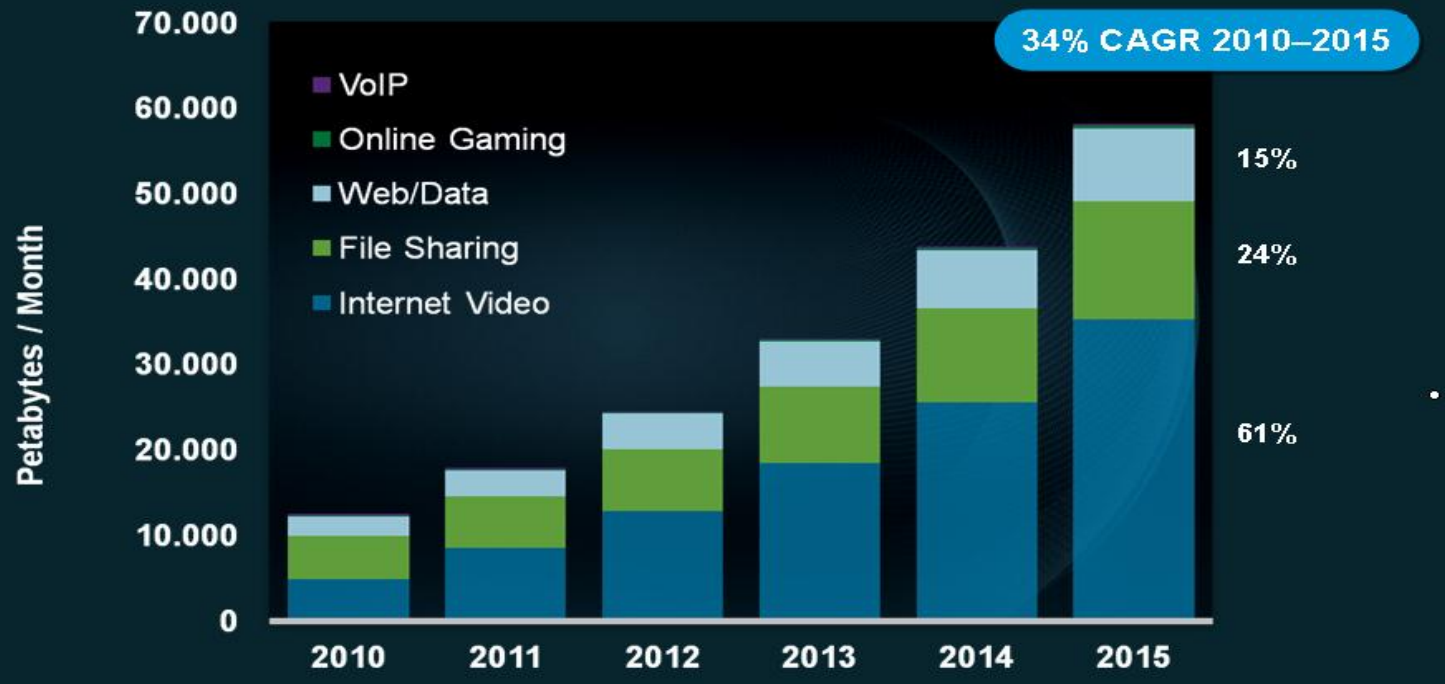
Global Consumer Internet Traffic / Applications

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, 2010–2015

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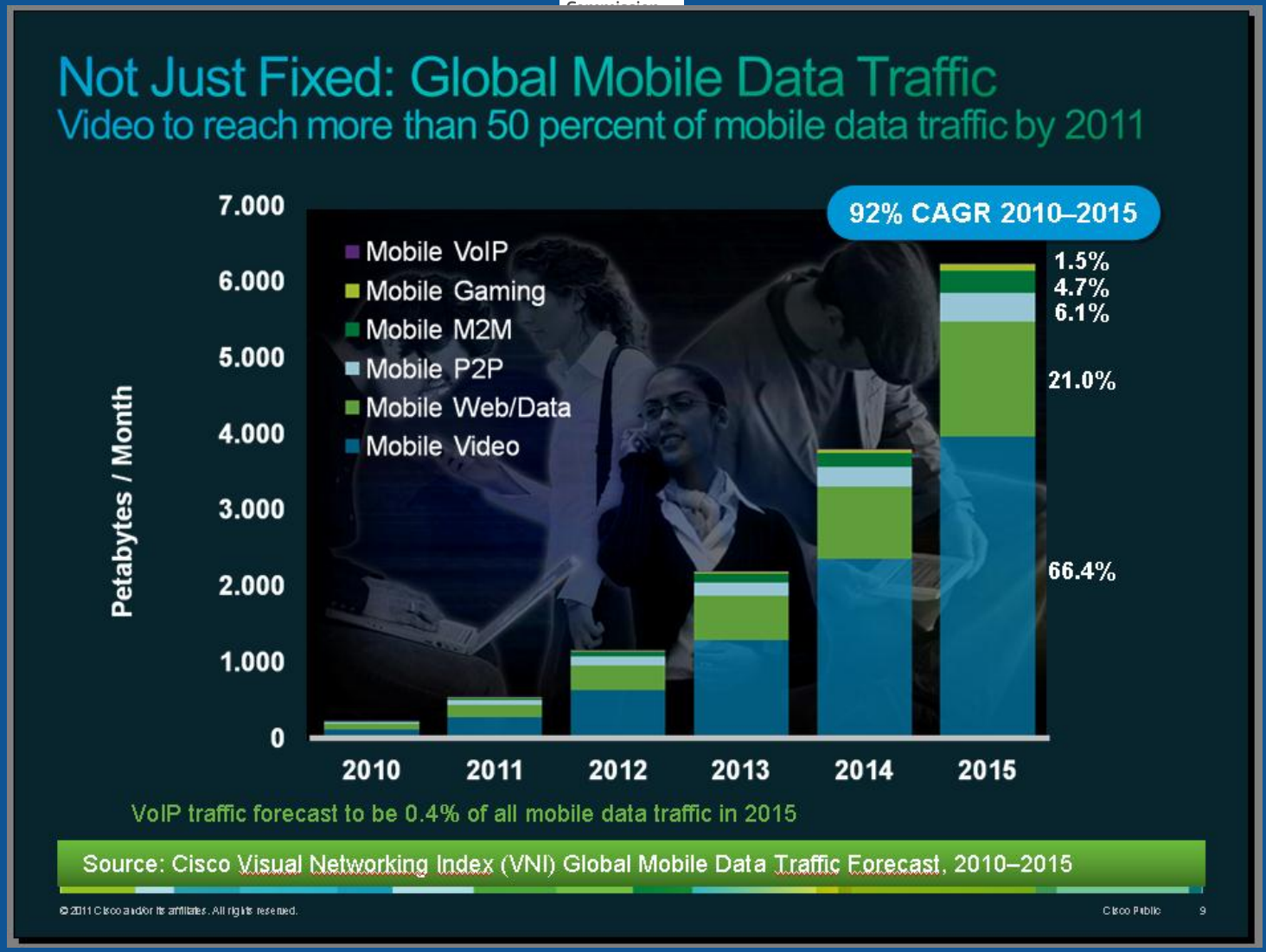
Not Just Fixed: Global Mobile Data Traffic
Video to reach more than 50 percent of mobile data traffic by 2011
92% CAGR 2010–2015
Mobile VoIP
Mobile Gaming
Mobile M2M
Mobile P2P
Mobile Web/Data
Mobile Video
Petabytes / Month
7.000
6.000
5.000
4.000
3.000
2.000
1.000
0
2010
2011
2012
2013
2014
2015
1.5%
4.7%
6.1%
21.0%
66.4%
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
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Cisco Public
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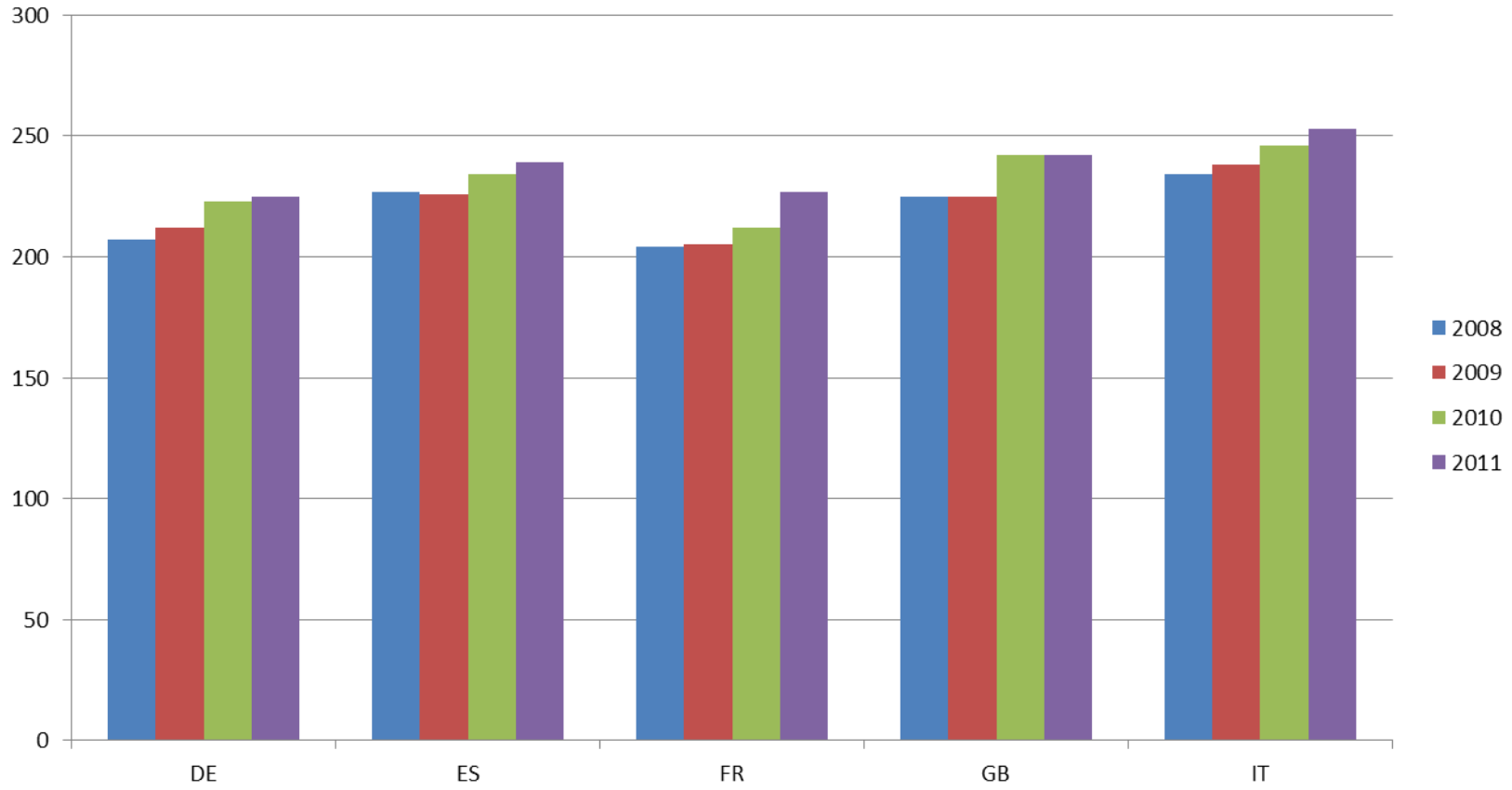
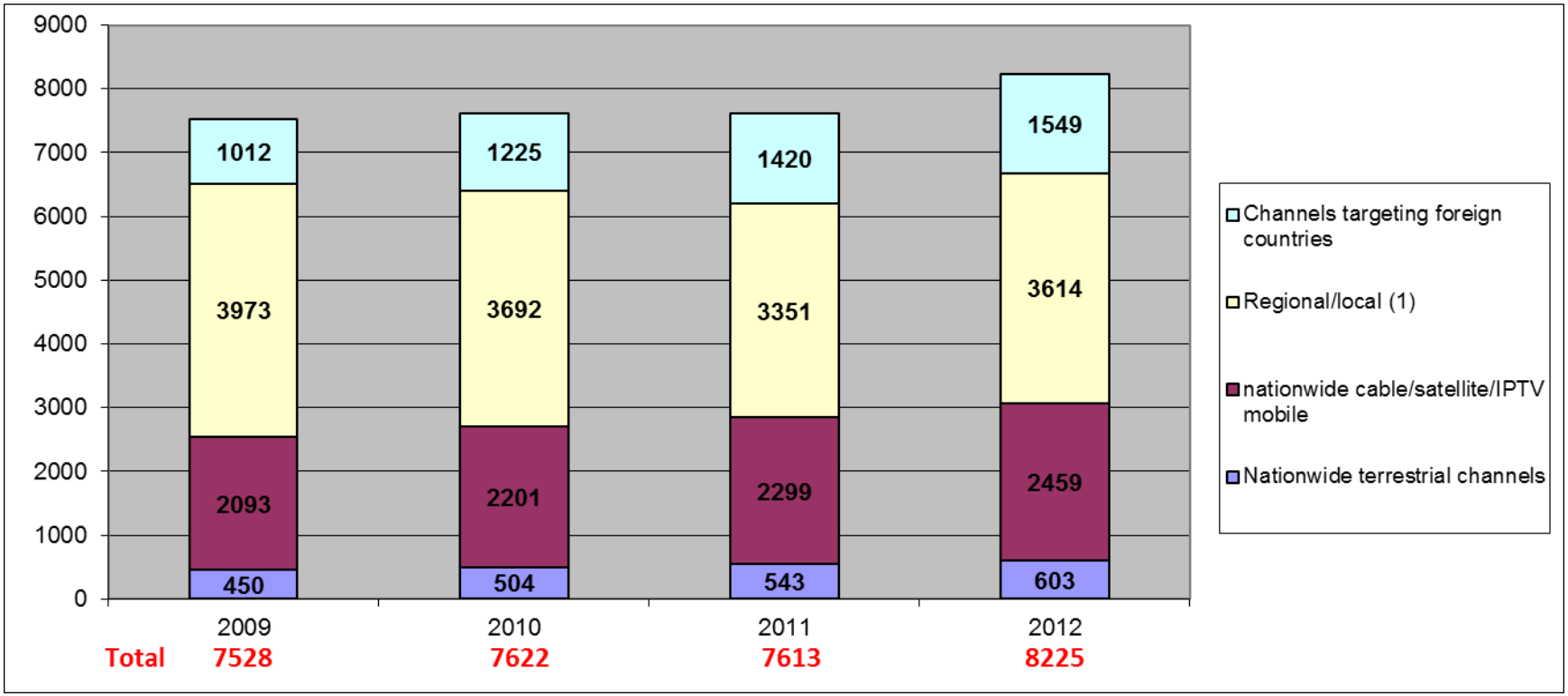
Daily average TV viewing time (minutes)



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

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