

# Regulating the mobile TV market

**Michele Wakefield**

Senior Technology Advisor -

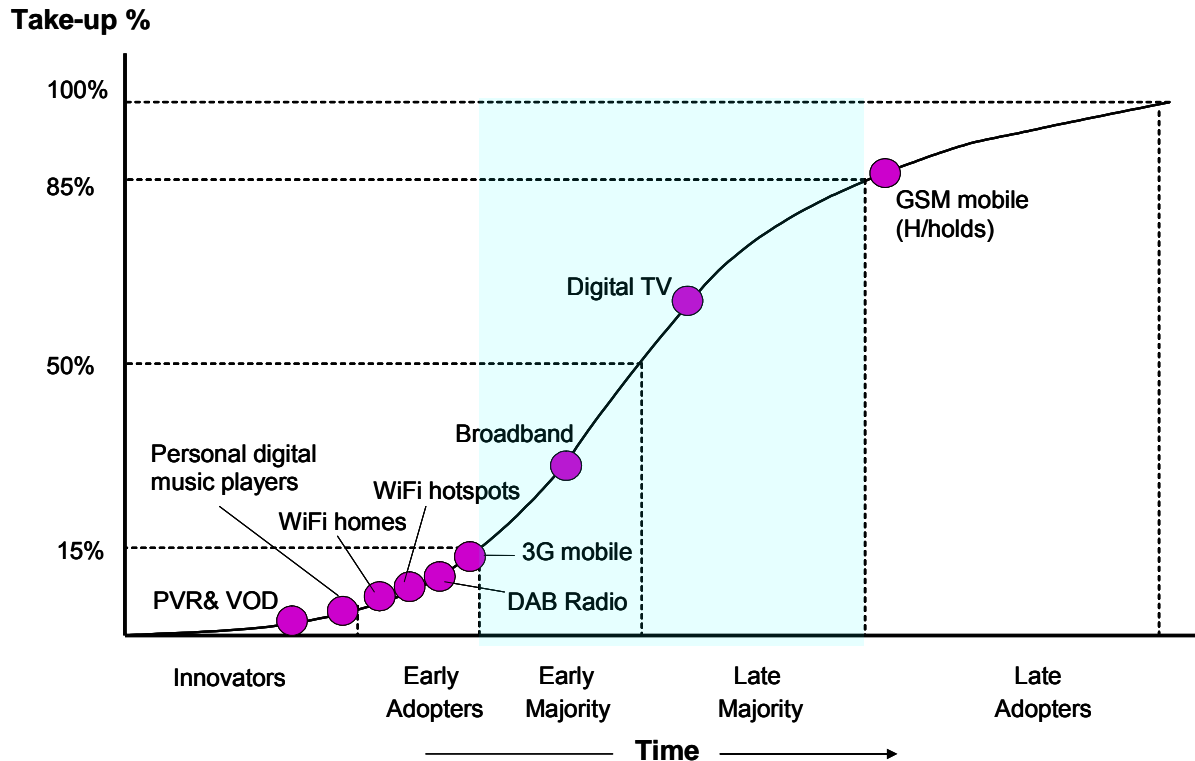
Broadcast and New Media Technology, Ofcom

## Overview

- Section 1 – The UK communications market
- Section 2 – Spectrum opportunities for mobile TV services
- Section 3 – Mobile TV content regulation

# Digital technologies are entering the mass market

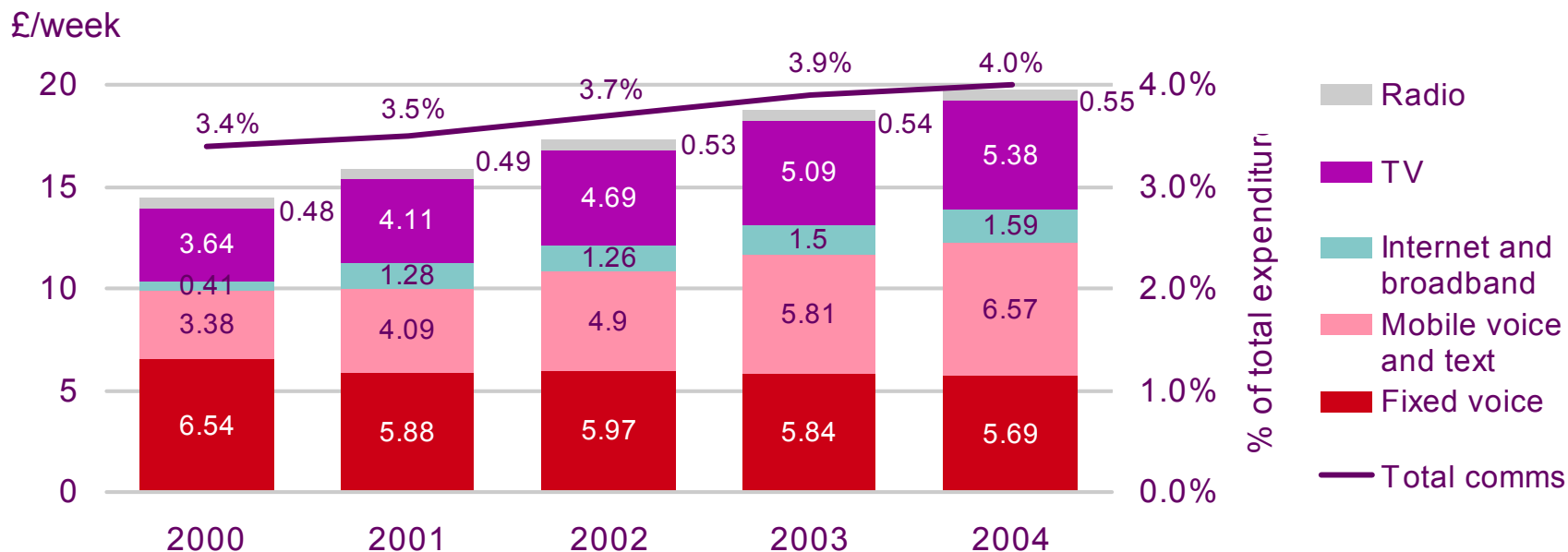
Increasing choice over when and how content is consumed



Source: Ofcom

# Mobile and pay TV household spend continues to rise

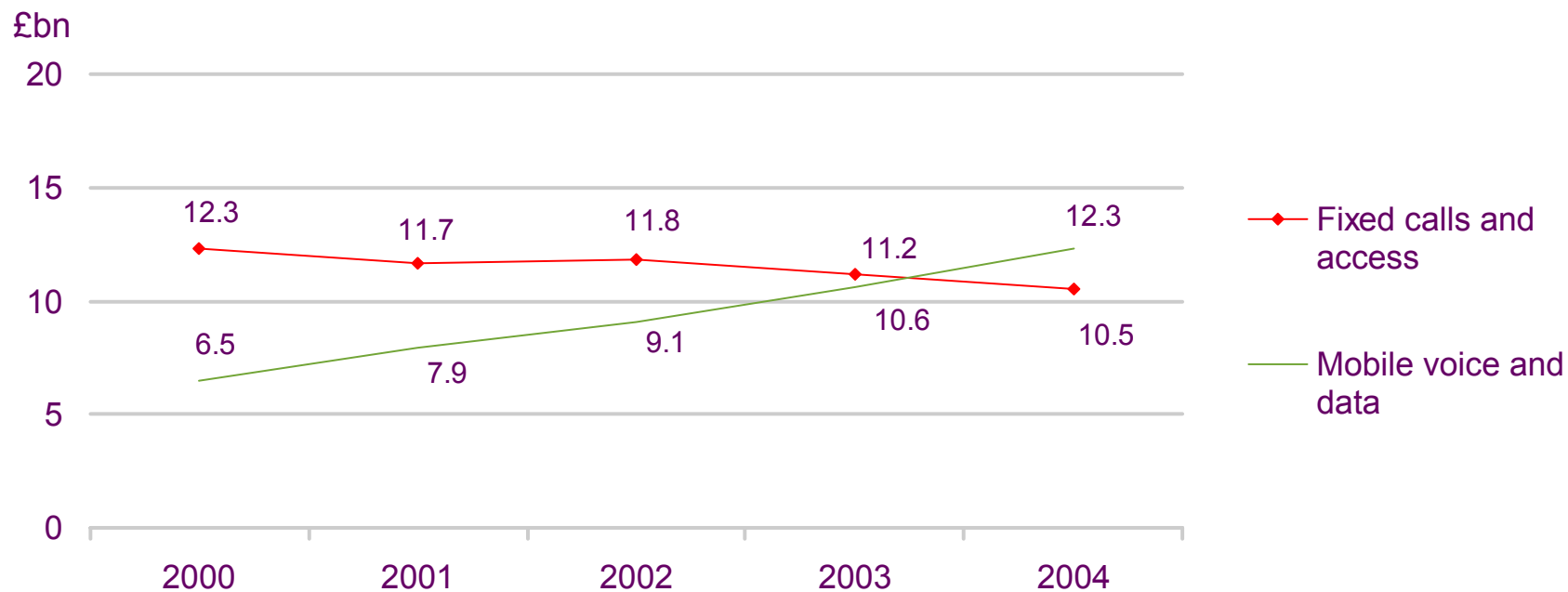
## Average weekly household communications spend



Source: Ofcom / operators / licensees / BBC

## Mobile revenues now greater than fixed

### UK telecomms industry retail revenues



Source: Ofcom / operators

- Section 1 – The UK communications market
- Section 2 – Spectrum opportunities for mobile TV services
- Section 3 – Mobile TV content regulation

## Ofcom's spectrum management agenda

### **The Given: Fulfil our statutory duties**

Ensure optimal use of the spectrum

Take account of the needs of all spectrum users

Maximise economic benefits of the spectrum

### **The Ambition: Make the UK the leading country for wireless investment & innovation**

A better signposted approach to spectrum, giving more certainty in the market

A flexible approach to spectrum, providing opportunity for innovation

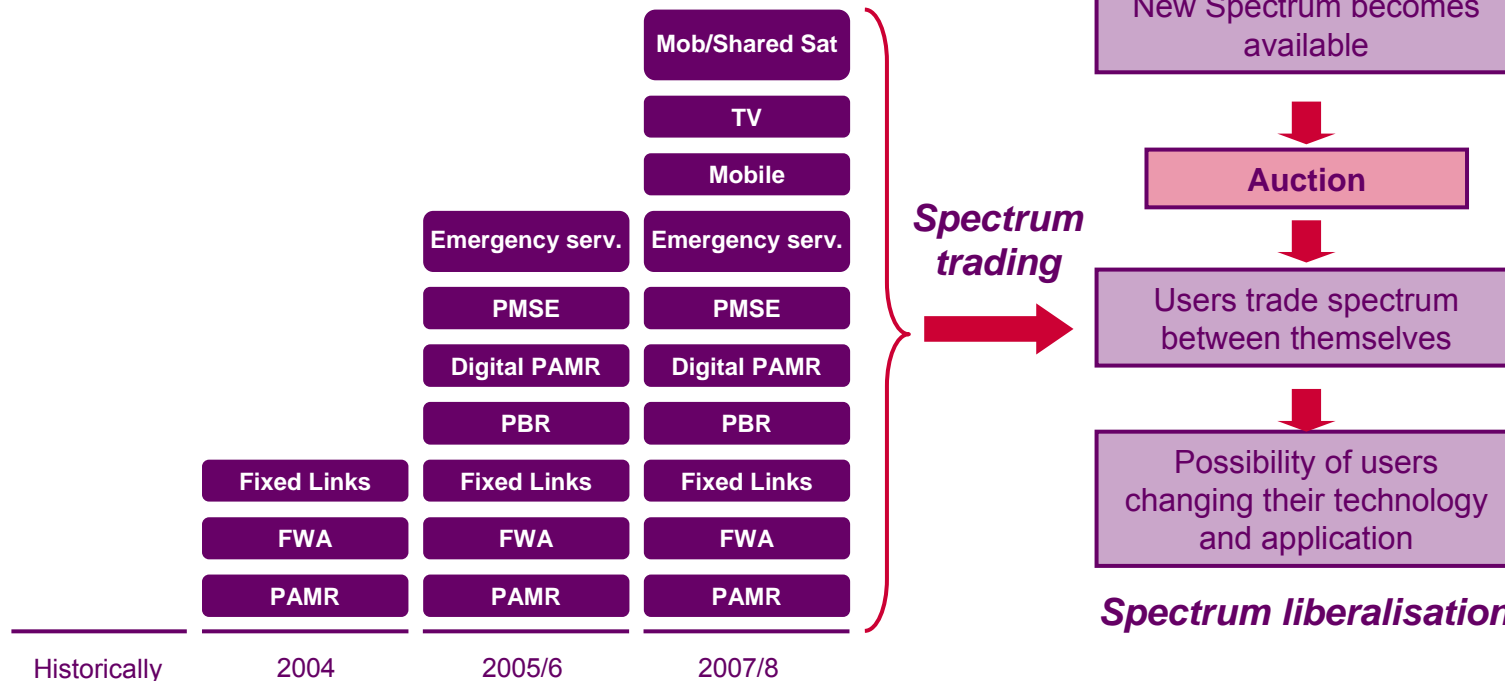
A competitive communications market, providing opportunity for returns on investment

# Spectrum Framework Review

## Spectrum trading and liberalisation

*Existing 'command and control' assignments (+95%)*

*New spectrum assignments (<5%)*



# Digital Audio Broadcasting

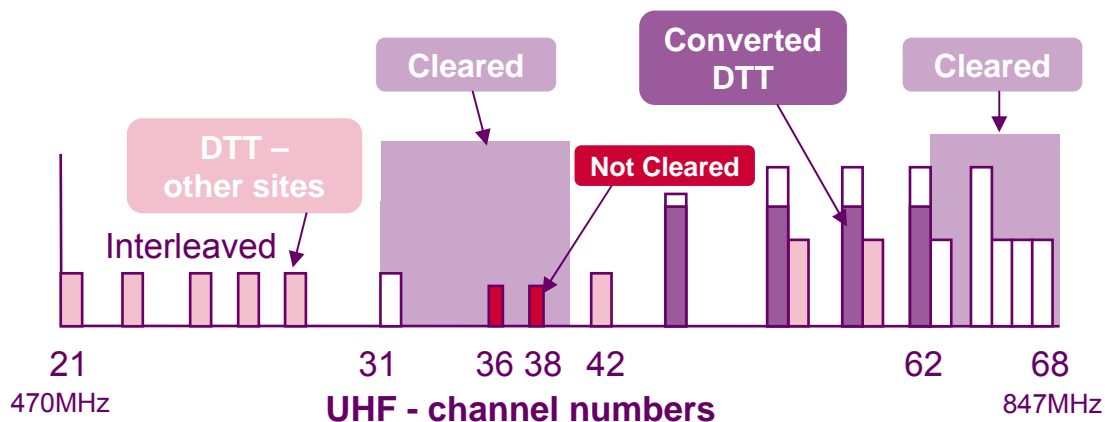
## Band III

- 20% of each DAB multiplex can be used for services other than radio
- Ofcom's Digital Radio Review has proposed an extension of the number of DAB multiplexes
- Proposals are subject to consultation this autumn and the on outcome of next year's international RRC 2006 radio planning conference

# Digital television switchover

## UHF/VHF

- TV spectrum currently used to provide five analogue and six digital multiplex channels
- Phased switch-off of analogue services planned to start in 2008 and finish in 2012
- Potential release of 14x8MHz channels depending upon outcome of RRC06



## L-band

### 1452 to 1492 MHz

- Identified for digital broadcasting across Europe
- Ofcom plans to auction spectrum on a technology service neutral basis in 2007
  - Fixed links currently using band are migrating to other frequencies

- Section 1 – The UK communications market
- Section 2 – Spectrum opportunities for mobile television services
- Section 3 – Mobile TV content regulation

# Television content regulation ...

## Analogue terrestrial

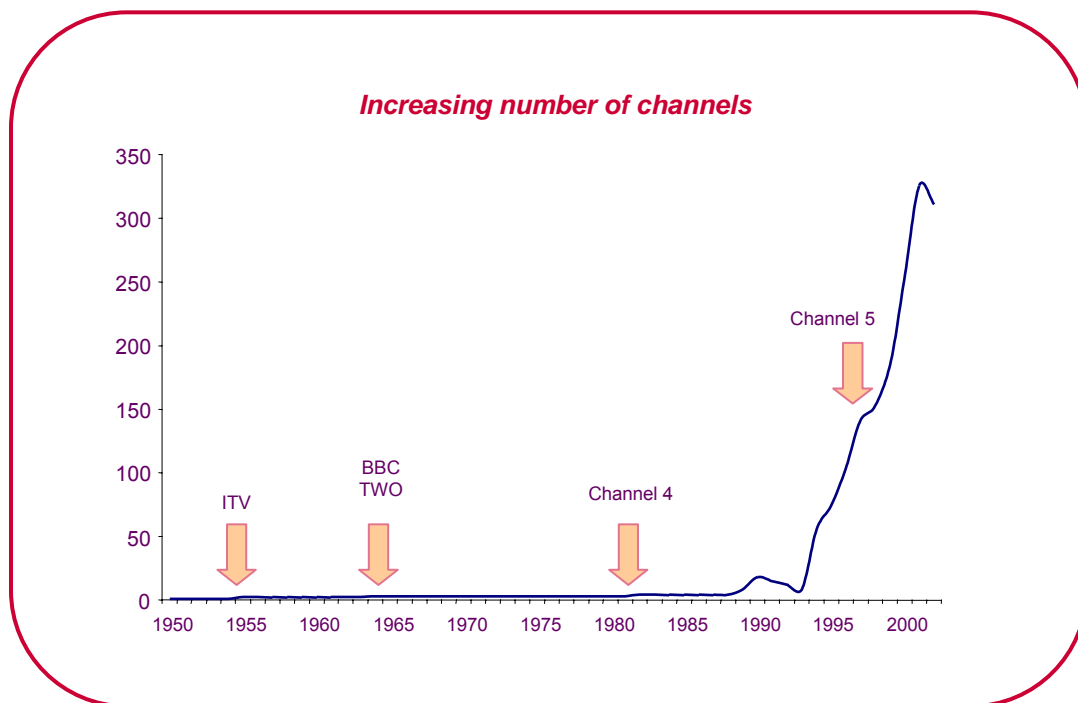
- Five channels
- Uninvited *guest*
  - Tier 1: Basic broadcasting standards (harm, offence, fairness, advertising)
- Access to scarce terrestrial television spectrum in exchange for **positive** content commitments
  - Tiers 2 and 3: Regional and independent production quotas, news, religion, children's, arts ...

	ITV1	Channel 4	Five
<b>Tier 1</b>	Basic broadcasting standards		
<b>Tier 2</b>	Independent production quotas		
	Regional production quotas		
	65% original	60% original	51% → 60% original
	News Current Affairs Regional News Other regional	News Current Affairs	News Current Affairs
<b>Tier 3</b>	Religion Children's Arts Education Documentaries	Religion Education Schools Multicultural + "innovation"	Religion Children's Documentaries Arts Education

# Digital multi-channel television ...

Provides much greater choice of content

- Only Tier 1 (basic broadcast standards) for new digital channels
- Digital TV now in more than 60% of UK homes



## On-demand content

Provides consumers **greater control** over what content is accessed

- **Not** regulated by Ofcom
- **Self regulation** of on-demand television services by the Association of Television on Demand (ATVOD)
- **Self regulation** by mobile content producers using The Independent Mobile Classification Body (IMCB) framework
  - Content providers self-classify their content as 18 where appropriate and provide access controls to assist subscribers to protect children and young people from unsuitable materials



▶ **Excellent examples of self-regulation at work**

## Internet content

### Vast range of content available

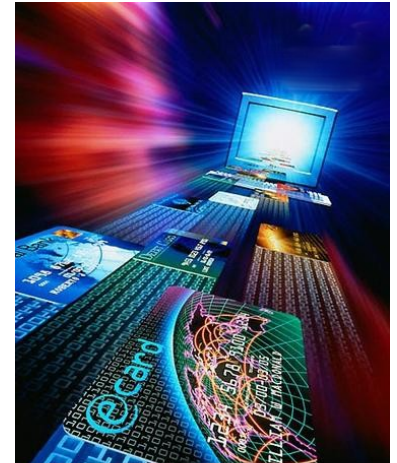
- Communications Act 2003
  - Internet content is largely unregulated
  - General law still applies: obscene publications, defamation, copyright ...
- Some illegal content dealt with by Internet Watch Foundation
  - Child abuse images worldwide, criminally obscene content and criminally racist content, hosted in the UK
- User centric control over what is accessed
  - Media literacy
  - Rating and filtering systems



## Media literacy

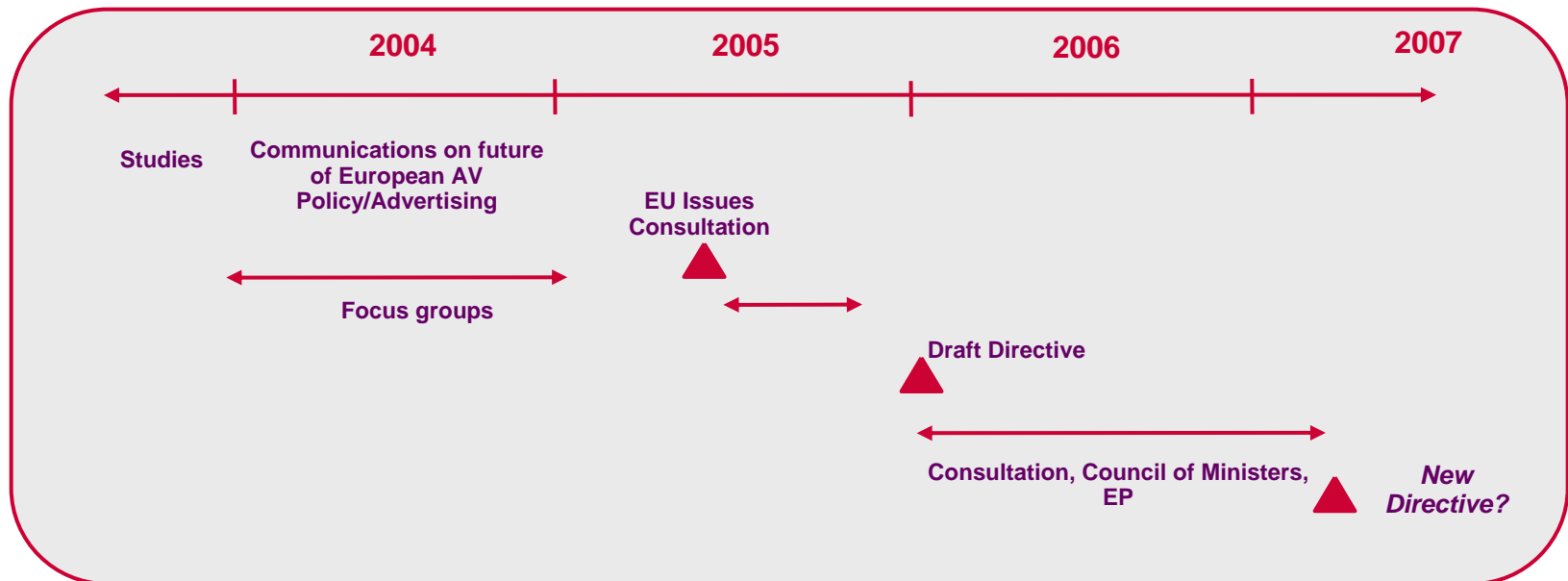
### Empowering the consumer in the digital age

- The Communications Act requires Ofcom to promote a better understanding of the nature, selection, regulation and control of electronic communications.
- The priorities
  - To research media literacy issues
  - To ensure people have access to adequate and timely information about the nature of audio visual content
  - To act as a signpost to advice and guidance on matters of safety and best practice; to connect media literacy projects and to work in partnership with other stakeholders to promote media literacy



## Mobile television content

- Is not explicitly excluded from licensing and content regulation by the 2003 Communications Act
- Ongoing review of the European Television Without Frontiers (TWF) directive
  - Sets statutory framework for television regulation by member states
  - Proposed extension of scope for content regulation across different delivery platforms



## Summary ...

- There are a range of different future spectrum opportunities for mobile television broadcasting
- Self-regulatory approach for on-demand and internet delivered content
- Ongoing European consultation over the future of audio-visual content delivered on different delivery platforms