

WORKSHOP

TELEVISÃO MÓVEL
MOBILE TELEVISION
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Mobile TV Technology and Information of the Future

Markets and Business Panel

Mobile-TV: have you got one in your pocket ?

G. Alberico
RAI – Radiotelevisione Italiana

- Systems for mobileTV like DVB-H (and others) are BROADCASTING services
- The equation:

MobileTV receiver = telephone

has very little to do with the technical reality:

- to receive such services the cellular phone functionalities **ARE NOT NECESSARY**
- even for “encrypted” or “pay” services the SIM card is a nice option, but **it is not the only one**

- Some assumptions have been used to support or justify the choice of one system or another:

- “it should be possible to have *roaming* of your preferred national TV program when you’re abroad”

or

- ... (when you are in a foreign country) you may want to watch local TV stations but in your own language

RIGHTS

**PRODUCTION
COSTS**



- Building a network to provide a mobile TV service with good coverage is expensive (whatever the technical system adopted)
- Is it feasible to use it for delivery of Free-To-Air services only?
 - **Public Service Broadcasters**: could the costs be covered by the government ?
 - **Commercial Broadcasters**: can they get Return-On-Investments in reasonable time with advertising only ?

If users are a few it could be considered as a waste of public money

Yes, but only when there is a mass market

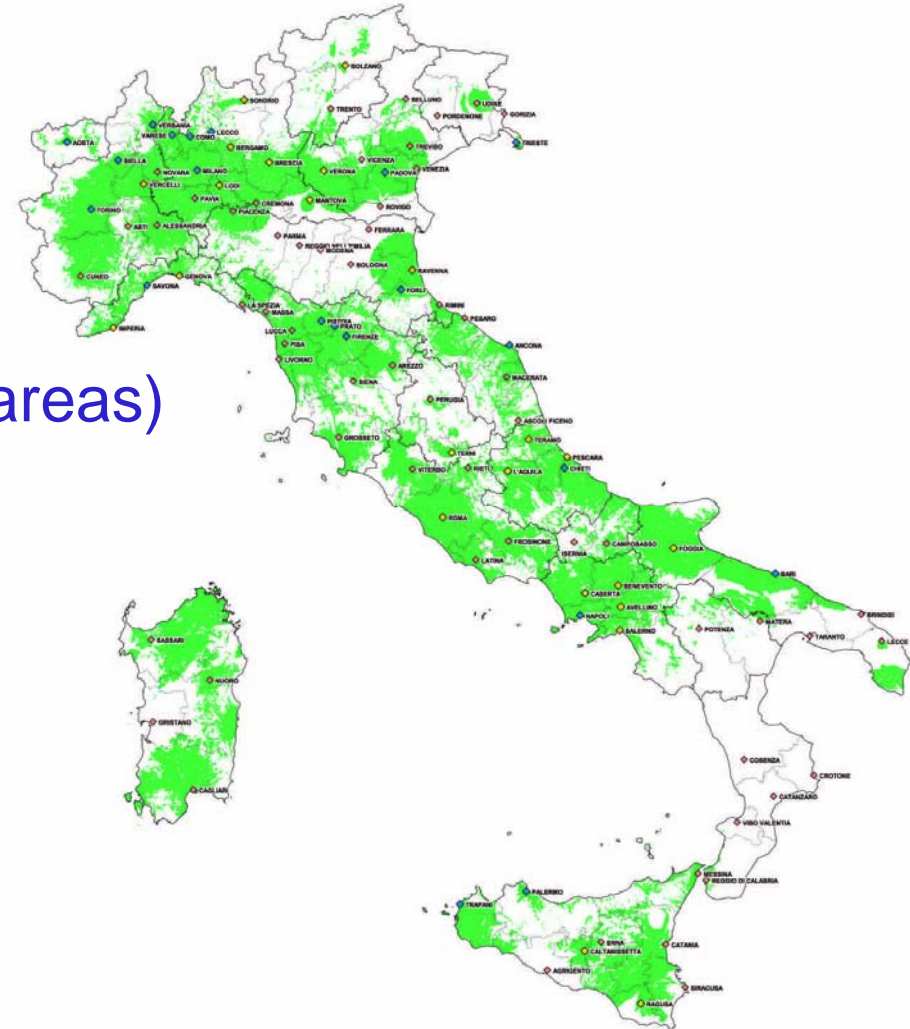
Mobile TV in Italy

Italian Mobile-TV market started, among the first in Europe, in 1964 ...

... but significant progress was achieved just recently



- 1000 transmitters
 - 5 W to 2.5 KW
- Coverage: 75% pop.
 - mainly outdoor (GREEN areas)
 - only large cities covered



- SKY Sport
- SKY Cinema
- SKY VIVO
- SKY TG24
- LA3 Live
- Rai1 – Rai2
- Mediaset
- Premiere League Soccer
- Moto GranPrix



- **Mobile-TV offer: 19 €/month**
(or: 2€/day, 9€/week, 59 €/ 6 months)

- **Full package offer: 29 €/month including:**
 - + Mobile Tv
 - + 1 hour/day of voice calls
 - + 1 hour/day UMTS videocalls
 - + Internet navigation (max 1 GByte/month)

- **Telephone is included**



■ **Coverage: 75% pop.**

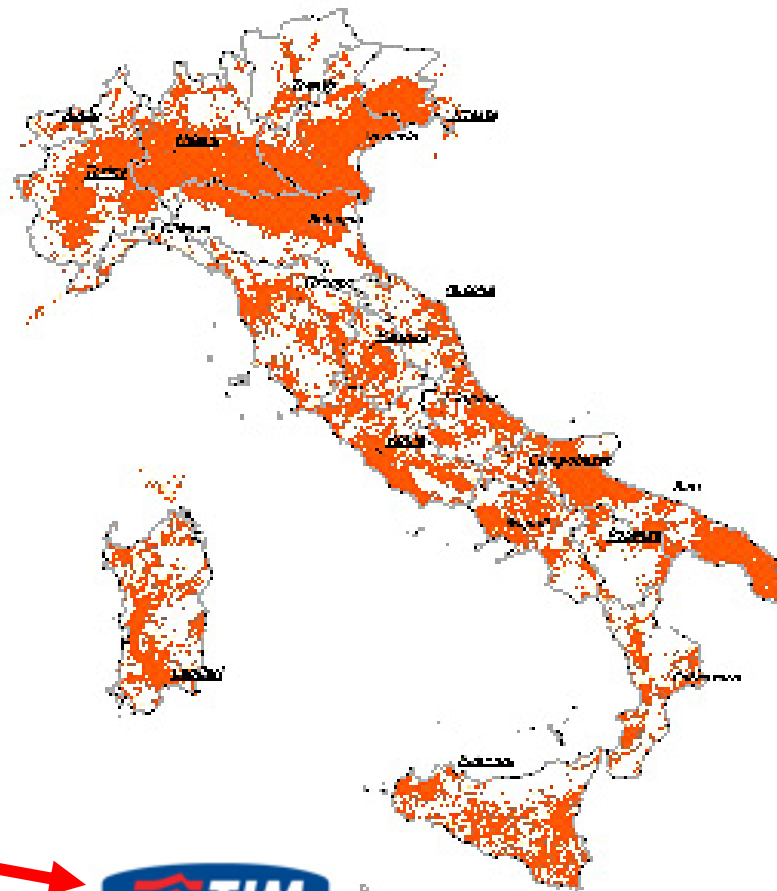
- mainly outdoor
- 100 cities

■ **Transmitters**

- 400 main TX
- 1000 urban repeaters

■ **Modulation: 16QAM - 1/2**

- Total capacity: 10 Mbps
- 2.5 + 2.5 Mbps allocated to TIM and Vodafone



■ TV Channels:



+ Soccer
(Premiere league)



■ Commercial offers:

- Offer 1: **5€/month** + 25€/month voice calls (at least 24 months) plus telephone at **199€**
- Offer 2: **49€/month** including 16 h/month voice calls and 1000 SMS plus telephone at **99€**

■ Terminals





- **Basic Package**
(9.90 €/month)

- **9 channels**
(free until April, 22th)

- **Premium package**
(free until June, 30th)

- **8 channels**
 - *Italian Premiere League*
 - *UEFA*

- **Terminal: 599 €**



- Till now, all the current commercial services:
 - no access to free-to-air channels
 - no possibility for broadcasters to control their brand and the access to their programmes
 - fragmentation of the offer: available channels depend on the operator you choose
 - no interoperability with other operators' terminals
 - *SW locks*
 - *different content protection mechanisms*
 - a few terminal brands (2-3) and models (4-5)

1. How to achieve a rapid growth ?
Who has to be involved ?

**Co-operation among
Broadcasters and Mobile Telco**

2. What are the key elements for success ?
3. What are the revenue streams ?

1. How to achieve a rapid growth ?

Marketing

- Do not confuse technical possibilities with commercial viability (don't try to sell a technology but services)
- Even if you have a brilliant product, you need to market it
- Very few products are iconic (e.g. iPod)
 - they need little marketing
- DTT failed initially in Spain and UK
 - now fastest growing digital TV platform across Europe

2. What are the key elements for success ?

Trying to predict the future ...

■ Human psychology needs

- human needs may be unexpressed (but a new technology can wake them up) (think of Web, SMS)
- The human psychology is multiform and may change over the years MAKING FUTURE UNPREDICTABLE

■ Mature technology

- QoS, user experience (simple to use)

■ Sustainable business

- Cost of network, consumer devices
- Revenue model (service price, types of services, ...)

3. What are the revenue streams ?

■ For the broadcasting industry

- Access fees (for basic and premium packages)
- Pay-TV services (subscription, pay-per-view)
- Advertising (once mass adoption has occurred)

■ For mobile telco operators

- Service subscriptions
- Download sales (ringtones, applications and games)
- Premium messaging (SMS/MMS revenues from viewer voting, user polls, etc.)
- Portal traffic (links and traffic for sending video clips, etc.)

- Availability of **spectrum resources** and their usage
- Risks of **vertical development of the market**,
(terminals locked to each single operator):
 - Access to horizontal (FTA) offers ?
(this should be mandated by the Authority as it is now for digital receivers)
 - Possibility for the user to migrate to another operator ??
- Risks of **multiple transmission of the same content** on different networks: how many times the same channel will be encrypted/delivered ?
→ **global system inefficiency**



- Strong synergies between the broadcast and telco world are required (win-win approach)
- Consumers do not necessarily agree with the judgement of engineers
- It is OK to predict “WHAT” ...
... but never try to predict “WHEN”

Predicting the future is easy. It's trying to understand what's going on NOW that's hard

Fritz R. S. Dressler

Thank you

g.alberico@rai.it

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