

HOW 5G CAN ENHANCE PUBLIC SERVICE MEDIA'S CONTRIBUTION TO THE DIGITAL SOCIETY

The broadcasting industry has been an early driver of digital technologies, standards and innovation. For Public Service Media (PSM) in particular, digital innovation underpins universal availability to all members of the society and a crucial contribution to informed citizenship. A well-adapted 5G EU policy and development can support PSM's role and contribution to the digital society.



DELIVERING PUBLIC VALUE FOR CITIZENS WITH DIGITAL INNOVATION

PSM organizations provide a wide range of audiovisual media services, including linear, on-demand, time shifted, hybrid, interactive, personalised services, multi-screen and multi-view, and cross-platform services.

Audiences access these services through different user devices, including personal devices (e.g. PCs, smartphones and tablets), connected radio and TVs, and a host of streaming devices. As devices continue to improve, user expectations on quality and availability of services increase. PSM organisations have also developed hybrid audiovisual and radio services which efficiently combine broadcast and broadband technology. European broadcasting standards, including DVB-T2, DVB-S2 and HbbTV in particular, guarantee the highest standards of quality delivery and generate economies of scale.

While on-demand use is growing, traditional live TV still represents the vast majority of total viewing time (about 4 hours a day). Free-to-air Digital Terrestrial TV remains the most widespread platform for TV reception in the EU (it reaches over 250 million viewers), followed by cable, satellite and IPTV distribution. Today, 94% of EBU Members also livestream their TV channels on the Internet.

Programmes provided by PSM are trusted and valued by audiences and attract high levels of viewership. In 2015, EBU EU Members were reaching 330 million

EU viewers every week, over two-thirds of the total EU population.

PSM in the EU invest yearly 16.6 billion in content and this quality content combined with innovative services has been among the key drivers for the take-up of fast and superfast broadband and of the adoption of new consumer technologies.

If the 5G ecosystem support the whole audiovisual and radio value chain, from content creation and aggregation, over distribution to consumption by users, PSM content and services could play the same role in the adoption of 5G.

Potentially, 5G developments could support:

- Development of content **formats and genres**, e.g. cross-media, multi-lingual and interactive,
- Development of new **types of services**, e.g. augmented and virtual reality, personalized services,
- IP-based and networked **media production**, remote production workflows,
- **Distribution** of the right content on the right device at the right time in the right place.

REQUIREMENTS TO MAKE THE POTENTIAL OF 5G A REALITY

5G developments could be an opportunity to find sustainable solutions that will meet future needs of PSM and their audiences as well as other participants of the value chain. In order to make this happen 5G technical development and related policy decisions need to take into account a number of requirements.

Audiences should benefit from:

- Easy access to and prominence of content of public value
- Low barrier to PSM accessibility services
- Universal access to PSM content and services free of recurrent charges (e.g. free-to-air)
- Quality of service

PSM should be able to:

- Deliver content to the public without blocking or filtering and without gatekeeping,
- Deliver services without discrimination compared to equivalent services,
- Control and protect the content and service, including their online signals and the integrity of their offer,
- Define the geographical availability of their services,
- Reach audiences in emergency situations,
- Have unimpeded access to audience data generated of their services,
- Develop suitable business models to ensure universal availability of PSM content and services.

As for all distribution networks it is crucial that distribution costs are transparent, predictable and affordable. The higher these costs are the less PSM can invest in content.

5G SUPPORTING EUROPEAN AUDIOVISUAL POLICY OBJECTIVES

The EBU and its members are supportive of 5G developments. As the pace of activities continues to accelerate the EBU is working with the telecommunication industry in order to provide timely input to the standardization process. The EBU and its members are committed to continue this work and to expand cooperation to other relevant stakeholders.

Requirements identified by the EBU cannot only be met by technical solutions. A European 5G Policy should reflect a holistic approach.

It should:

- Support the development of an open and interoperable 5G technology platform
- Foster a pluralistic and diverse European audiovisual and radio landscape,
- Support the whole audiovisual and radio value chain, from content creation and aggregation, over distribution to consumption by users,
- Contribute to achieving national and European audiovisual policy objectives,
- Be a vehicle towards cooperative use of broadcast and broadband infrastructures,
- Bridge the gap between technology research and the creative sectors.

Therefore:

- Digital Single Market policies, in particular spectrum policy, net neutrality principles and audiovisual media services policy, must support a holistic approach to 5G development. The requirements identified by the EBU and its members must be taken into account in the relevant EU regulatory reviews;
- The Commission should support improved collaboration between the interested parties, especially between the telecom industry and creative sectors;
- An umbrella scheme to bridge the gaps between R&D, content production and technological innovation in the media field should be set up.