TITAN Conference
Broadband Access to the PAB

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Agenda

1. Available Technologies

2. Scope for « convergence » in infrastructure and services

3. Competitive landscape :
   - Access to contents
   - Delivery of contents

4. The regulatory « hot potato »

5. Conclusions

1. Available technologies

a) Fixed networks

- Coaxial Cable (EURO DOC.SYS)
- Over the air TV (analog and digital)
- Over the air TNT (DVB-T)
- « Copper » pair (DSL)

b) Mobile networks

- 2G/3G networks media capabilities including DVB-H

2. Scope for convergence in infrastructures and services

a) Short term perspective. Infrastructure competition is raging.

- Infrastructures : too soon .... or too late
- Services :
    1. Both cable and « copper » pair fight for survival
    2. TV over 2G/3G, an « add up » to voice/data services

b) Longer term perspective. Which infrastructure competition ?

- The netco/servco model ?
- Will content providers be the arbitrators ?

3. Competitive landscape

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a) Access to contents

- The current « business case » of the network operators
- Will contents (media) prices go up ?
- « Direct » access to content via Internet

b) Delivery of contents through xDSL

- Technical constraints
- Return on investments

4. The regulatory « hot potato »

a) The three-layer regulatory model in Belgium

b) The Belgian conundrum

- Constitutional issues
- Industry structure

c) Re-unite or divide further ?

5. Conclusions

a) « Convergence » is ultimately a consumer issue/choice

b) « Converged » service offering is a complex issue
   - Technologies (hard, soft)
   - Regulation

c) DSL and DOC.SYS networks are neck to neck in convergence

d) Price wars and unsecured ROIs are real threats

e) Belgium is a « unique » laboratory