

Audiovisual media services and 5G

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The European audiovisual (AV) media context

The European audiovisual media ecosystem is rich and diverse

- 25% of the global AV market
- Co-existence of commercial and publicly funded providers

European cultural, creative and media industries – key economic sector

- 6.8% of GDP (€860 billion in 2014)
- 6.5% of Europe's employment (approx. 14 million jobs, highly-skilled)
- Rooted in local territories, economies, and cultures
- Companies of all sizes (more than 1 million SMEs)

World class excellence in both **content creation** and **technological innovation**

- Substantial potential for further and sustainable growth in both domains

Substantial challenges

- Struggle to turn home-grown success stories into global opportunities
- Content creation programmes are disconnected from technological developments
 - The old model is broken, too slow to bring R&D results to the users
 - No research programme that combines these two dimensions
- Parallel developments of telecom networks and the purpose-built AV infrastructure
 - Lack of interoperability; no alignment between the development roadmaps

Industry initiative – platform for creativity and innovation in AV sector

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OBJECTIVES FOR A POTENTIAL SCHEME INNOVATION AND CREATIVITY IN THE AUDIOVISUAL AND RADIO SECTOR

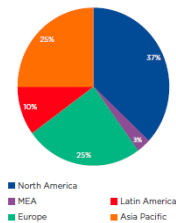
Media convergence is accelerating the sector's move towards a research-driven industry. Europe's strong tradition of investing in R&D for media and broadcasting is undeniable. However, today, investment in **technological innovation** in Europe is dwarfed by powerful global players.

On the other hand, the European audiovisual and radio ecosystem is in a unique position - it reaches citizens directly with highly diverse and trusted content in terms of entertainment, education, news and drama. This position is shown by the European share of the general global audiovisual and radio market. In comparison, on the global on-demand market Europe is losing ground. Nevertheless the European audiovisual and radio sector is rich and diverse. This can unleash an enormous creative potential for innovative services. We propose to capitalize on this strength by creating a European ecosystem for sustainable growth by developing creative and innovative media concepts, turning home-grown audiovisual and radio success stories into worldwide opportunities.

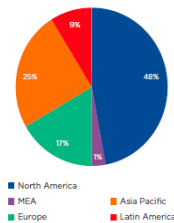
Separate programmes exist to support and strengthen respectively technological innovation and content creation. However there is no programme combining these two dimensions in a way that enables real change and fast acceleration from project ideas to implementation and pilots: Horizon2020 does not sufficiently take into account the creative and content dimension and Creative Europe targets smaller scale projects and offers low co-funding rates.

The audiovisual and radio sector is in need of an **umbrella scheme** to bridge the gaps between R&D, content production and technological innovation in the media field. This would ensure that in-depth media, IP and broadcasting know-how and skills remain and are nourished in Europe. It would also facilitate commercial and employment opportunities, attract young creatives, technology savvies and interested users. This will foster a pluralistic and diverse European audiovisual and radio landscape built on a common technical foundation which supports the European Digital Single Market.

Regional breakdown of global audiovisual market (2014, in %):



Regional breakdown of global on-demand market (2014, in %):



Source: EBU, based on IDATE data

Principles:

1. Involve from the outset both technology and creative sectors
2. Convergence between different technology pillars to generate new ecosystems for innovation and user impact
3. Develop enabling technologies for new business models and new services which will be appealing to the users
4. Fast market deployment: shorten the cycle from project ideas to their implementation and potential market impact
5. Turn European diversity into opportunities and orchestrate collaborative actions across creative and technology industries

Supporting organisations:



Association of European Radios (www.aereurope.org)



The European Coordination of Independent Producers (www.cepi.tv)



The European Federation of Journalists (www.europeanjournalists.org)



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The European Broadcasting Union (www.ebu.ch)

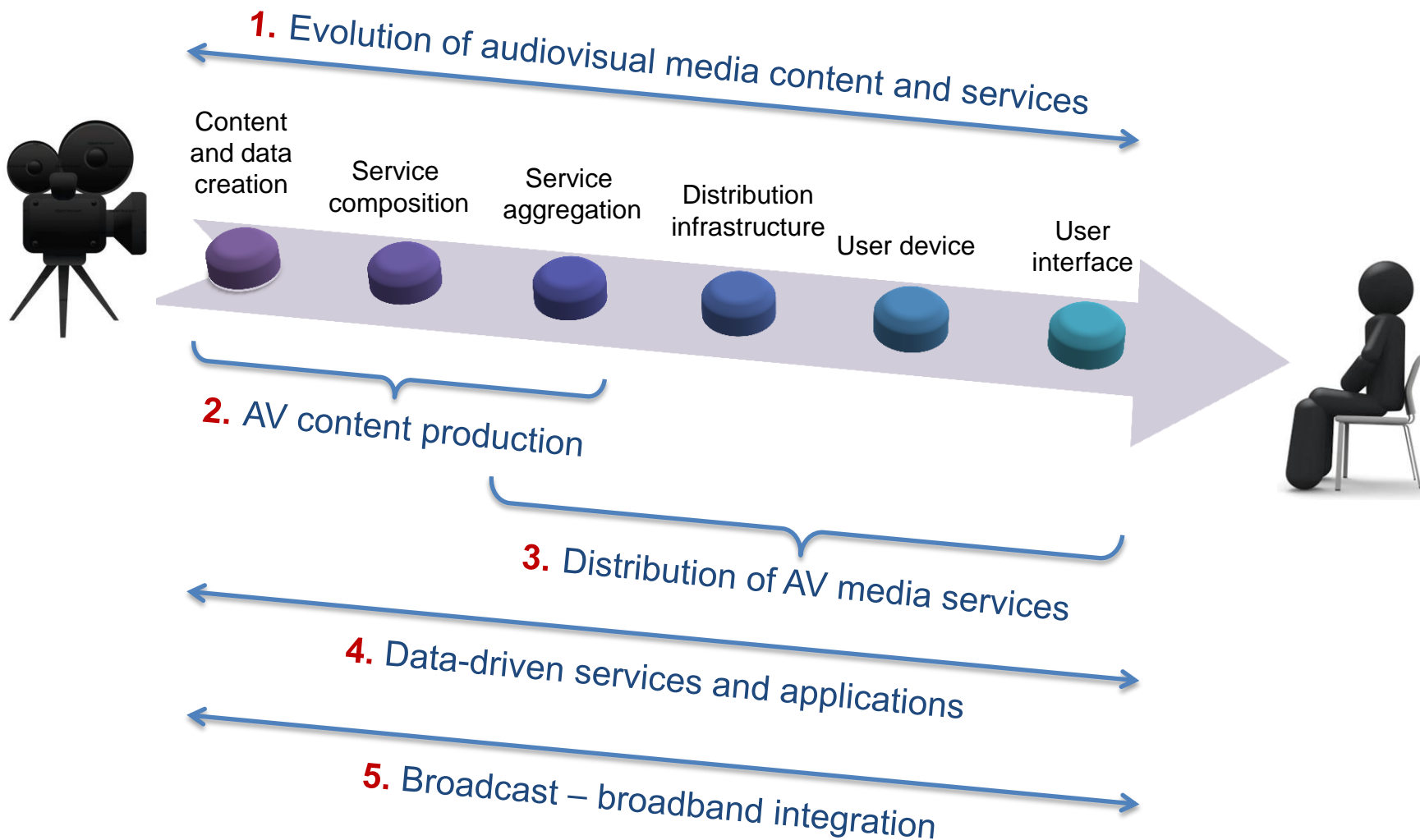


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5G as an enabler for the AV sector



Proposal

- Establish an umbrella framework that brings together European ***content creation*** and ***technological innovation***
 - Create new opportunities for the European audiovisual and technology sectors
 - Leverage on the European diversity and excellence in both domains
 - Open platform for both large and small media and technology providers, independent producers, as well as start-ups and SMEs

- Proposed research domains:
 1. Evolution of audiovisual media content and services
 2. AV content production
 3. Distribution of AV media services
 4. Data-driven media services and applications
 5. Broadcast - broadband integration

- Involve from the outset programme producers, journalists, and the users to collaborate with technology researchers
 - Requirement capturing, co-development, tests and trials
 - Fast market deployment
 - Education and training programmes to facilitate timely adoption

Thank you
for listening!

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European Broadcasting Union

Professional association of **public service media**

73 Members in 56 countries (Europe, North Africa, and Middle East)

- 780 TV services provided by EBU Members
- 1040 radio services
- broadcasting in 123 languages
- audience reach: > 1 billion people

34 Associates in Africa, the Americas, and Asia

The EBU operates Eurovision and Euroradio.

