



Editorial

With service launches in Austria, Netherlands and Switzerland, all based on the profiles developed in the **bmcoforum**, commercial mobile TV services are a reality in more than a single European country. Other countries as France, Germany, Hungary and Poland may follow soon. TV services launched are based on the DVB-H standard providing good quality, easy access and transparent pricing for the end user.

Another positive development is on the technology side: More handsets have been developed with integrated DVB receivers being it DVB-T or DVB-H receivers. For handset hardware manufacturing there is no difference, this signals a growing market and increase choice for consumers. Europe is still far away from having such a wide variety of devices available as in Japan and Korea. In Japan all new mobile phones are said to be ISDB-T enabled. These numbers really open the door for advertisement revenue and more differentiation in business models. Europe is a different less homogeneous market but numbers count and that's where the joint effort in Europe will be focused up on.

bmcoforum is now tackling the next challenge: audience measurement data, just as in standard TV advertisers need measurement data and the good news is that mobile TV can deliver good data. Having the solutions ready when mobile TV will become a mass market is KEY for advertising.

bmcoforum has started audience measurement activities by gathering requirements. In a next step they will be further considered for technical implementation approaches. Audience measurement standardisation, starting with the basics, is needed to avoid country and device specific solutions.

Franklin Selgert
Chairman of the Board

Hot Topic: IBC 2008 – Technology consolidation for wider markets

[read more on page 2](#)



Editorial

In this issue:

- New **bmcoforum** members..... 2
- IBC 2008 – Technology consolidation for wider markets... 2
- KPN experiences of introducing mobile TV in the Netherlands..... 4
- Results of the **bmcoforum** annual plenary meeting 2008..... 5
- News from the **bmcoforum** work items..... 5
- New **bmcoforum** studies..... 6
- Relaunch of the **bmcoforum** web site..... 7
- Events..... 8

New **bmcoforum** members

Since the last newsletter, Eutelsat, Harris, ITRI, Mediapulse, Regiocast Digital, Ringier, Telenor and Turkcell have been approved as **bmcoforum** members.

The total number of **bmcoforum** members is 110.

IBC 2008 – Technology consolidation for wider markets

At IBC 2008 (12th-16th September 2008) mobile broadcasting was again all around the show, but the hype this year was IPTV and the outlook to 3D TV. First time DVB-T2 has been demonstrated (by BBC) which may impact mobile broadcasting in the future.

DVB-H, DVB-SH and MediaFLO signals were available all over RAI, broadcasted by **Arqiva** and **KPN**. More multiplexes were available elsewhere in the exhibition halls locally sited, among those being **B21C** project, **castLabs** and **GMIT** at **bmcoforum** booth.

The Mobile Zone, sponsored this year by **MediaFLO**, was slightly smaller than last year due to extended IPTV zone in hall 12.

Being an exhibitor at **bmcoforum** booth I was unable to attend all halls, so I focused on our membership, following the **bmcoforum** exhibitor guide. Therefore, the following can be a snapshot only.

The general impression was that technology is on a consolidation trip now, providing more and more commercial solutions than new technologies. So everybody is waiting for more and bigger markets.

Although more vendors were providing smart card based service purchase and protection solutions, after more and more countries starting with DRM solutions I have been asked several times on the future of smart card profile, whether there are still operators in favour of this technology.

Another frequently discussed issue was the provision of DVB-T based devices in Germany, the impact on DVB-H in Germany and the potentials of DVB-T in other countries.

Platforms:

MEDIA BROADCAST (Austria) and **Nokia Siemens Networks** (Switzerland, Netherlands) demonstrated DVB-H platforms in commercial use: both based on DRM profile. **Thomson** announced the provision of its Mobile TV platform to **3 Italy** (obviously using Open Security

Framework) and **MediaFLO** demonstrating its commercial platform currently deployed in the US.

Other exhibitors demonstrated pilot platforms as **Alcatel-Lucent** and **NDS** for Singapore, based on DVB-H and smart card profile.

Although the OMA BCAS T enabler is just to be stabilised, all main CAS vendors (**Irdeto**, **Nagravision**, **NDS**, **Viaccess**) and several other platform providers (**Alcatel-Lucent**, **Enensys**, **castLabs**, **NSN**, **Thomson**) demonstrated smart card profile implementations, obviously closer to commercial implementations than in Barcelona in February this year.

Alcatel-Lucent demonstrated DVB-SH in UHF, unified UHF/S-Band access on a single handset and unified DVB-H/DVB-SH access on a single handset.

More and more platforms are able to serve multiple standards, both at the bearer and the service layer.

Devices:

MediaFLO demonstrated all together 4 different device types of different vendors (Samsung, LG, Pantech, ZTE) and some interactive applications.

One of them demonstrated real-time user presence, referrals & chat, where a user could see on his mobile what his friends are watching, asking them to join the channel he is watching or opening a chat with them, all in parallel to TV watching. A social networking application allowed users to update the status on their Facebook profiles to let friends know when they are watching MediaFLO.

Nokia's DVB-H based N96 is commercially available now, however so far the DRM profile only has been supported.

More accessories came up to enable non-mobile broadcast devices for mobile TV reception. This seems to be a serious way for giving mobile TV access to a wide variety of devices.

As already in Barcelona again the **PacketVideo** Mobile Broadcast Receiver Telly had a lot of traction.

And some CAS vendors (e.g. **Irdeto** and **Nagravision**) demonstrated microSD card based service purchase and protection for un-connected devices, among them for a GPS-based navigation device.

Inviz showed its IHT-700R, a DVB-H based pocket TV device with portable multimedia player (PMP) functions.



bmcoforum at IBC

The **bmcoforum** booth was again just in the centre of the Mobile Zone, so every visitor of the Mobile Zone had to bypass our booth. Again, the number of visitors was high, the majority very qualified.

Other than before visitors did not come for testing mobile TV on the devices but for talking about business.

bmcoforum presented its brand new studies on "Best Practice Regulatory Frameworks for Mobile TV", "Mobile Broadcast Business Models" and "Interactive Mobile Broadcast Use Cases", all copies out of print after the second day of the show.

All together, six members and the Celtic / Eureka R&D project **B21C** "Broadcast for the 21st Century" demonstrated a wide spectrum of mobile TV technologies, modules, products and services at the **bmcoforum** booth.

Alcatel-Lucent demonstrated DVB-H and DVB-SH mobile TV, both in UHF and in S-band.

B21C represented by the project partners **Thomson, Teamcast, Alcatel-Lucent, DiBcom** and **Turku University of Applied Sciences** provided results qualifying the DVB-SH end-to-end transmission using a DVB-SH automatic laboratory test bench and presented the first DVB-SH receiver chipset from **DiBcom**.

castLabs came with its fully OMA BCAS compliant mobile TV service delivery platform featuring DRM and Smartcard profile and being part of the Austrian commercial platform.

GMIT demonstrated interactive radio for DVB-H, end-to-end solutions for interactive mobile TV but also head end solutions as the broadcast multi-screen monitor and network satellite receiver.

MediaFLO technology for broadcasting video, audio and data could be seen on two mobile devices.

Safenet provided a portfolio of DRM and mobile TV protection solutions including client and server-side toolkits and software as well as SIM-based BSF user authentication components.

Additionally **Ubipart** again showed interactive mobile TV services.



KPN experiences of introducing mobile TV in the Netherlands

In September, 3 months after launching its "MobielTV" proposition with two handsets in the marketplace, KPN announced having reached over 10,000 mobile TV subscribers.

What were the specific campaign choices? KPN decided that, with the quality surpassing almost everyone's expectations, "seeing is believing". In order to have as many "demos" as possible in the shortest time, KPN has decided to include the "MobielTV" service in every subscription over 27.50€ p.m. for everybody buying a DVB-H enabled handset. The standard fee for the MobielTV contract is 9.95€.

The KPN campaign was centred on a slogan "waiting will be fun". Although it might not be good English it worked well in the Dutch market. The

campaign was based on the insight that TV is no longer used to watch specific programs. Instead, TV is used to relax. Mobile TV brings the opportunity to relax whenever and wherever it suits you.

The visuals and contact moments were arranged around waiting spots like public transport. KPN did not use any technical explanations or special brand names for the service. For customers it was clear in the shop the handset as clearly exposed and there was no doubt about which handset can support the TV service. After purchase the provisioning was one click away. The content package was well balanced and has two pay channels, sport and adult.

The goal KPN reached was to have something on always anytime. The mix contained the most well known TV channels in the Netherlands. There is one special mobile channel that has a slightly mobile adapted format and is news oriented, called RTL24.

KPN did not extensively communicate coverage percentage, but on the web site the coverage area can be viewed. The network has a good indoor and outdoor coverage giving the user the impression that mobile TV works where the mobile phone works.

The coming year will be an exciting one for mobile TV in the Netherlands. The current figures are

promising and especially the growth curve is strong and not topping off yet. As always with mobile services handsets play an important role, so getting continuous supply of new models is the KEY.

Results of the **bmcoforum** annual plenary meeting 2008

The annual plenary meeting 2008 discussed the **future of mobile broadcasting** and resulting further directions of **bmcoforum**. Some identified megatrends to be taken into account are:

- Next generation services may converge mobile broadcasting with home services including IPTV or automotive services.
- Advanced content and service development will include new technologies and standards.
- Consumer generated content; social networking and open internet are impacting mobile phones.
- Advertising on mobile devices will become different faces, becoming interactive and being placed on a portal, in a TV channel, in the programme guide or while zapping.
- Intelligent interfaces, cognitive radio and 3D will bring new application domains.

During the next time, **bmcoforum** board will draw conclusions from the discussion, e.g. to follow the cost cut down, to support mobile broadcast advertising as business enabler, to consider new services and the relationship between interactive IPTV and mobile TV.

The plenary meeting approved the **bmcoforum** IPR policy, which can be downloaded under www.bmcoforum.org.

The re-elected board is chaired by Franklin Selgert (KPN). Vice-chairmen are Bernard Pauchon (TDF), Steve Turner (NXP) and Bernd Wiemann (Vodafone). Other board members are Luigi Ardito (Qualcomm), Jürg Bachmann (Goldbach Media), Martin Bögelsack (T-Mobile), Frank Hartung (Ericsson), Jouni Kämäräinen (Nokia), Herbert Mittermayr (Alcatel-Lucent), Alexandre Mestre Molins (Abertis Telecom), Osman Şen-Chadun (Arqiva), Melanie Stewart (Turner Broadcasting) and Bob Tyler (National Grid Wireless).

News from the **bmcoforum** work items

During the last months the "**Regulation and Spectrum Lobbying**" group has focussed on assessing the related regulatory frameworks. In June 2008, in conjunction with the "**Generic Business Models**" group the study "Best Practice

Regulatory Frameworks for Mobile TV" has been published. Upcoming work will focus on promoting best regulation in national workshops in countries which are in the process of establishing their framework. Furthermore, the group will follow the EC socio economic study in parallel with technical CEPT reports.

The "**Interoperability**" group is maintaining its OMA BCAST implementation guidelines to keep them aligned with OMA enabler release. The need for an extended "operator profile" has emerged. The group has started considering implementation issues of audience measurement requirements as well as generic feature and tools for the implementation of interactive mobile broadcast use cases, both generated by the "**Content Formats and Services**" group.

The "**Bearer Technologies**" group, in response to membership demand has continued working on the second version of the comparison document which is to include additional emerging bearer technologies such as DTtv, CMMB, LTE, ATSC M-H and E-SDR etc. The study is planned to be published later this year.

The "**Broadcast Network Structure and Coverage Expectations**" group is working on a wide variety of topics including network design issues, terminal performance evaluation, DVB-SH performance analysis as well as updating reference link budgets including mobile DVB-T

reception. The corresponding studies shall be published later this year as well.

In September 2008, the "**Generic Business Models**" group has published a new study "Mobile Broadcast Business Models - Generic Business Models and Country-specific Implementations". Furthermore, this group was part of the best practice regulatory framework analysis in conjunction with the "**Regulation and Spectrum Lobbying**" group. H. Mittermayr (Alcatel-Lucent) has been appointed as the new chairman of this group, deciding in October 2008 on the upcoming work.

Also in September 2008, the "**Content Formats and Services**" group has published its study "Interactive Mobile Broadcast Use Cases". An internal document is breaking down the use cases to generic features and tools required for their implementation, to be further discussed in the "**Interoperability**" group. Together with some national audience measurement companies and based on the IST ARENA project results, audience measurement requirements have been drafted to be further discussed during the next time, also in conjunction with the "**Interoperability**" group. Besides audience measurement, the group is defining its contributions to enable mobile broadcast advertising in general, both important prerequisites for free-to-air business models.

New **bmcoforum** studies

The following **bmcoforum** studies may be downloaded under www.bmcoforum.org:

Best Practice Regulatory Frameworks for Mobile TV (June 2008)

The analysis of practices as well as country-by-country experience in licensing and regulating mobile TV highlights a range of positive solutions. Countries who are about to decide on a particular regulatory framework and business model can pick and choose from these solutions to create their own regulatory framework.

The report shows the effect of regulatory frameworks on the efficiency of commercial launches in a context where regulatory frameworks for mobile TV across Europe differ considerably. It intends to help the setting of regulatory frameworks for Mobile TV where it has yet to be defined.

Mobile Broadcast Business Models – Generic Business Models and Country-specific Implementations (September 2008)

After publication of the study "Mobile Broadcast Business Models – A State of the Art Study" in November 2006 more countries have started commercial implementations of business models,

among them Austria, Finland, Netherlands, Switzerland and US. Other countries are in different implementation phases as on-going public tenders, negotiations between the players or soft launches. Based on their experiences our understanding of viable business models and its variety have been extended.

This report reflects these new experiences. After explaining general aspects of business models, the report describes the situation in the analysed countries. This may help countries being in an initial phase of defining their framework not to run into some obstacles other countries have experienced.

Interactive Mobile Broadcast Use Cases (September 2008)

Although standardisation is essential to allow different types of mobile devices from different vendors to interact, it could not yet be agreed on any existing standard, resulting in the fragmentation of services and a range of individual implementations.

This study describes several use cases of interactive mobile broadcast services to illustrate the desired service offerings. It shall open content providers the range of possibilities to enrich mobile TV services. The use cases might also be considered for the development of a first implementation profile.

Relaunch of the **bmcoforum** web site

Have a look at our relaunched **bmcoforum** web site www.bmcoforum.org. At our home page you will find now updated information on **bmcoforum** news, meetings and studies.

As a new service we provide daily mobile broadcast news, which can be retrieved also on a country by country basis (mobile broadcast status world-wide). Let us know your latest mobile broadcast news to be included here.

Finally, the work item description pages also summarize all their deliverables.



Events

Conferences & Exhibitions

October 21st, 2008

Mobile TV Central & Eastern Europe
Hilton Hotel, Budapest, Hungary

October 31st, 2008

2nd International Forum "Mobile Broadcasting"
Conference Hall KievExpoPlaza, Kiev, Ukraine

**October 31st and November 18th –
November 20th, 2008**

NexTV 2008 Summit Latin America
Cartagena, Colombia and Buenos Aires,
Argentina

November 3rd – November 4th, 2008

Mobile TV Middle East
Jumeirah Beach Hotel, Dubai, United Arab
Emirates

November 12th – November 14th, 2008

2nd Annual DVB-H and Mobile Broadcasting
Forum 2008
Amsterdam, Netherlands

November 14th – November 15th, 2008

Bleibt Fernsehen Fernsehen? (in German)
Jahrestagung und Mitgliederversammlung
der DGPK
St. Pölten, Austria

November 18th – November 21st, 2008

NATEXPO 2008 (Mobile TV Session on
November 20th, 2008)
International Exhibition Center Crocus Expo,
Moscow, Russia

February 2nd – February 5th, 2009

11th international exhibition and conference
CSTB 2009
International Exhibition Center Crocus Expo,
Moscow, Russia

February 16th – February 19th, 2009

Mobile World Congress 2009
Fira Montjuïc, Barcelona, Spain

bmcoforum Meetings

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|------------|--|
| 08.10.2008 | WI7 Content Formats and Services Workshop |
| 09.10.2008 | WI5 Generic Business Models Workshop |
| 27.10.2008 | WI2 Interoperability Workshop |
| 28.10.2008 | WI4 Network Structure and Coverage Expectations Workshop |
| 12.11.2008 | Board Meeting |
| 04.12.2008 | WI4 Network Structure and Coverage Expectations Workshop |
| 09.12.2008 | WI2 Interoperability Workshop |
| 10.12.2008 | WI7 Content Formats and Services Workshop |

bmcoforum

The 'Broadcast Mobile Convergence Forum' (**bmcoforum**), the worldwide leading industry association on mobile broadcasting, was founded to shape an open global market environment for mobile broadcast services. The more than 100 members of **bmcoforum** join forces to identify relevant content and services, support technology standardization and implementation, as well as lobbying for spectrum and suitable regulatory framework, to accelerate commercial implementations of new user experiences in receiving broadcasting services and initiating interactivity at mobile devices.

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