

Challenges of ensuring compliance and enforcement in a changing media ecosystem

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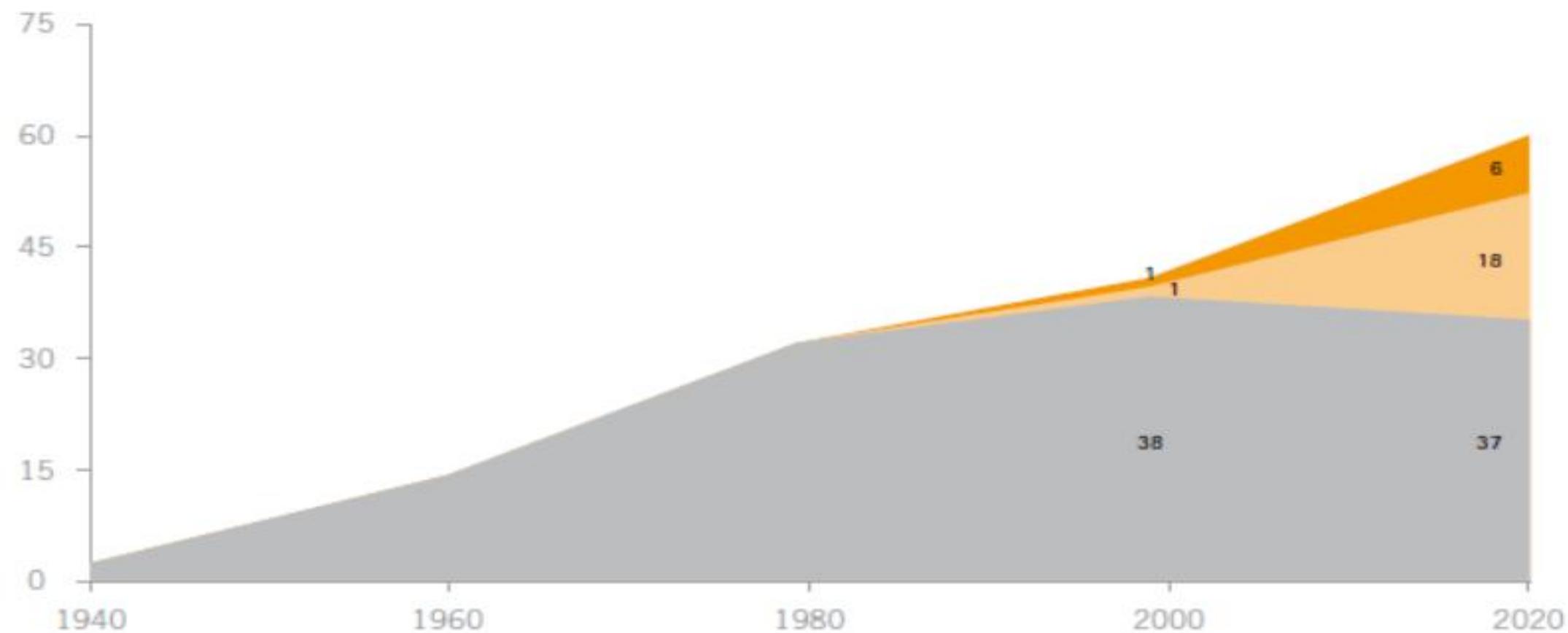
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patterns

ONLINE/MOBILE DRIVING VIDEO CONSUMPTION GROWTH GLOBALLY

Exhibit 1.0
Nr. of hours per week spent per media type

■ Mobile video ■ Online video ■ TV

Nr. of hours per week spent per media type



Source: Carat insight media survey; European Technographics Benchmark Survey; eMarketer; Gallup TV meter; SKO; MMS; BARB AdvantEdge; Mediometrie; CIM TV; Eurodata TV, The Nielsen Company; BCG Analysis

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- “*Media Regulation is fine-tuning of democracy*”

Evelyne Lentzen, first Chairperson of the Belgian CSA, 1997



Privacy no longer a social norm, says Facebook founder

Bobbie Johnson, Las Vegas

Monday 11 January 2010 01.58 GMT



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People have become more comfortable sharing private information online, says Facebook founder Mark Zuckerberg. Photograph: Eric Risberg/AP

The rise of social networking online means that people no longer have an expectation of privacy, according to Facebook founder [Mark Zuckerberg](#).

Talking at the Crunchie awards in San Francisco this weekend, the 25-year-old chief executive of the world's most popular social network said that privacy was no longer a "social norm".

"People have really gotten comfortable not only sharing more information and different kinds, but more openly and with more people," he said. "That social

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- “The results of the sub-group’s questionnaire show that there is broad consensus that the goals listed above remain relevant, even if the mechanisms through which they are achieved may have to evolve.”

ERGA Report on material jurisdiction,
2015



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- “*Media Regulation is fine-tuning of democracy*”
- *Have a specific compliance and enforcement strategy*
- *Follow seven main principles:*
 - 1) *Think with a new mindset*
 - 2) *Think about new tools*



Self or co-regulatory schemes in EU 28

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 - 4) Think about what will matter in the future



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- “We note that historical evidence, while instructive, is limited in the context of today’s rapidly changing media markets and the trends that we have identified above. The rapid changes noted in the past two years, since 2013/4, may mark a fundamental shift in audience attitudes and consumption.”

OFCOM Report on Public Service Broadcasting in the Internet Age,

2015



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- “The trend is towards OTT video distribution, which favors tech players with the required technical know-how and consumer insights to take advantage of this situation. The shift in paradigm is underlined by the relatively rapid adoption of SVOD services in digitally mature countries, with OTT video gaining more market importance and traditional players being confronted with aggressive competitors.”

OBS Report on territoriality and its impact on the financing of audiovisual works,

2015



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 - 5) Think outside your material jurisdiction



Enforcement of protection of minors rules in EU 28

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“Even though these players fall out of the material scope of the Directive, they play a crucial role in the all the range of measures which can be put in place with the view of protecting minors from accessing harmful content. Their role is even more important in a fully digital environment where more and more households consume linear and non-linear programmes through a set-top-box.”

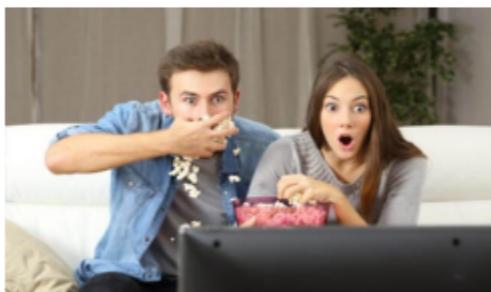
European Audiovisual Observatory REFIT Report on protection of minors,
2015.



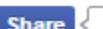
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[Be the first to know](#) By Peter 19/08/2016



Proximus TV

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You've probably heard about it: personalized advertisement will soon be introduced on Proximus TV.

Over the past weeks, customers received an e-mail or letter in the post informing them about this. Personalized advertisement has existed for a long time on the Internet. Yet unsuspecting viewers who break into a sweat when they read about this, or experience other stress symptoms, can rest assured: advertisement banners will not appear on their screens while they're watching a program. And no, we won't be bombarding you with advertisement related to the adult movie you just watched.

What's more, you'll hardly notice the personalized messages. In agreement with the channels, these messages will be carefully inserted in the advertisement blocks you already get to see.

And you will certainly not see more advertisement than usual: we will replace existing commercials with targeted advertisement. In case of deferred viewing, outdated program announcements may be replaced with advertising messages.

This will be done on the basis of your viewing behavior: for example, if you regularly watch football matches, you may receive more advertisement about sporting products. Because not every viewer

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 - 5) Think outside your material jurisdiction
 - 6) Think outside your territorial jurisdiction



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Breakdown of VOD services available in the EU in 2014

EU 28	National	Established in another EU country	Established in the US	Established in another country	Total VOD services	Share of EU cross-border services	Share of non-national services
Total	651	426	763	111	1951	22%	67%

OBS Report on origin and availability of on-demand services in the EU,
2015

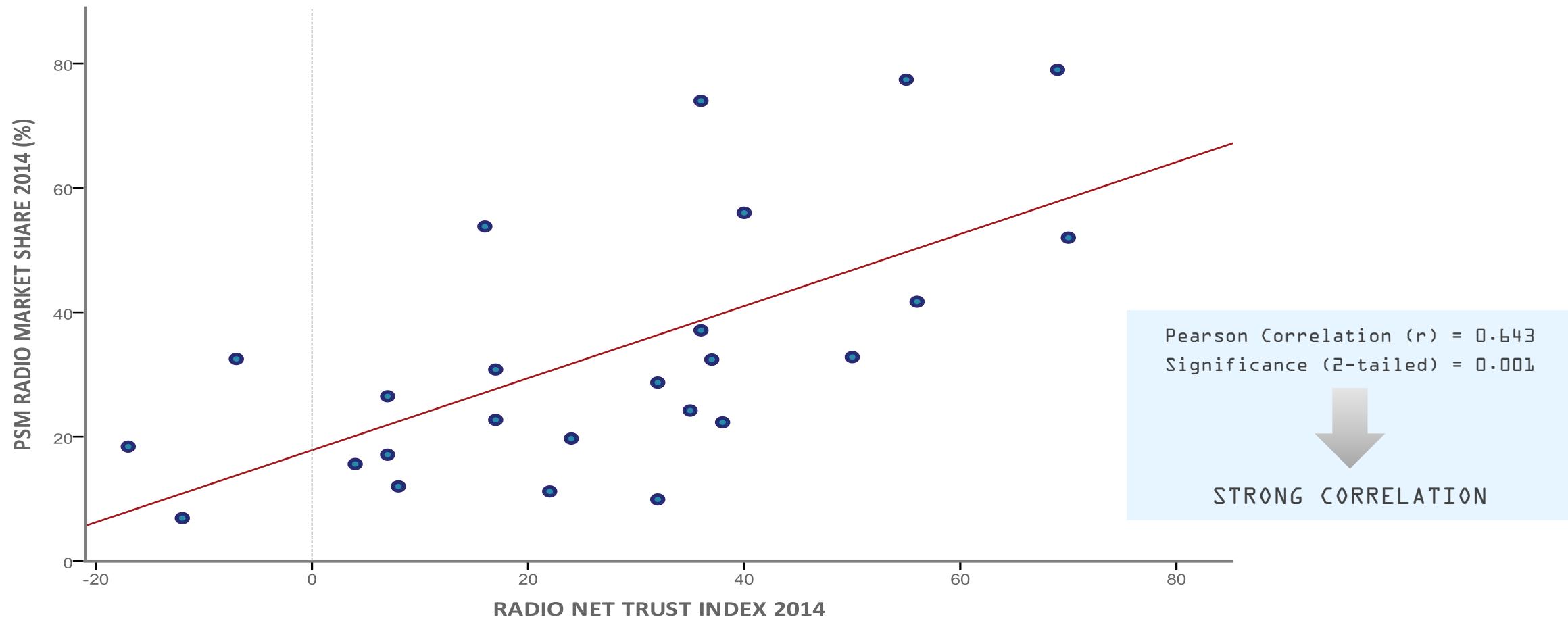


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 - 6) Think outside your territorial jurisdiction
 - 7) Think about democracy



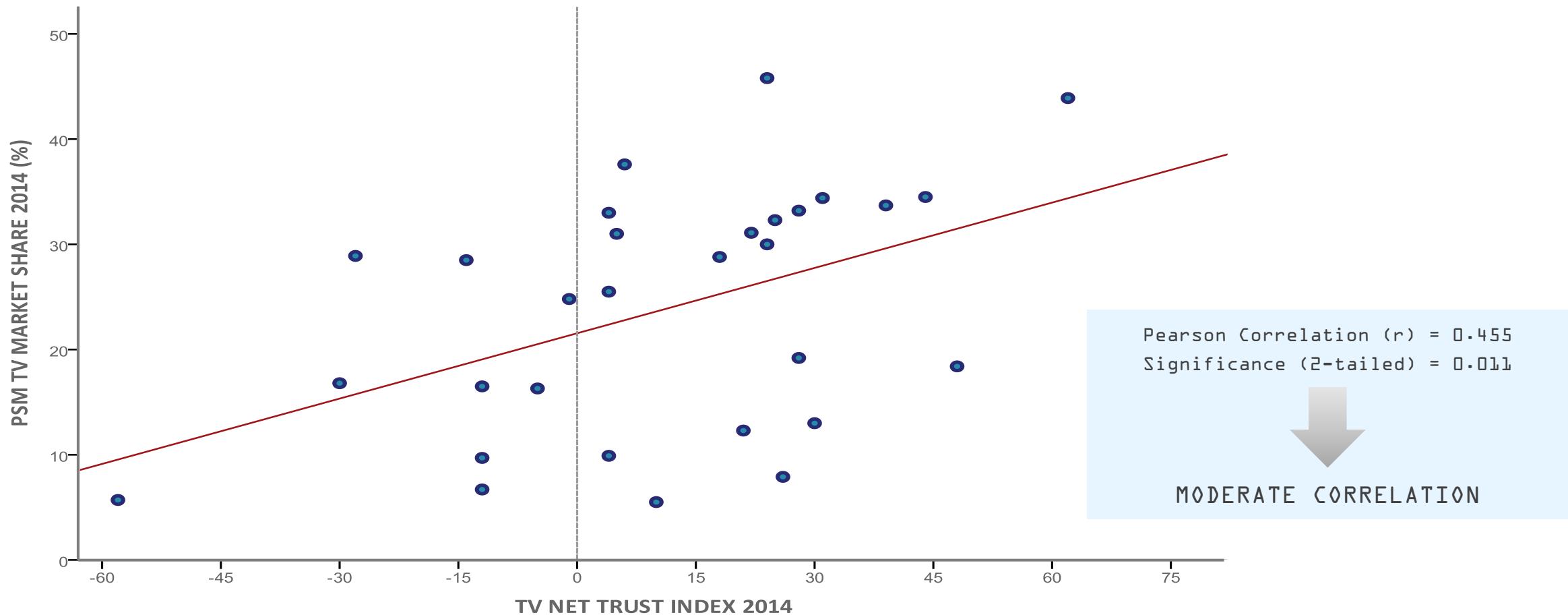
PSM RADIO MARKET SHARE vs TRUST IN RADIO



In countries where the market share of the local PSM radio organization is higher, trust in radio also tends to be higher. This relationship also implies that for media organizations it could be beneficial to work on gaining the trust of citizens, as higher trust in radio levels are linked to higher PSM radio market shares.

Note: the Net Trust Index was developed by the EBU-MIS based on data from Eurobarometer, defined as the difference between the percentage of the population who 'tend to trust' and 'tend not to trust' the given medium. The Net Trust Index does not measure trust in public service media, but trust in media in general.

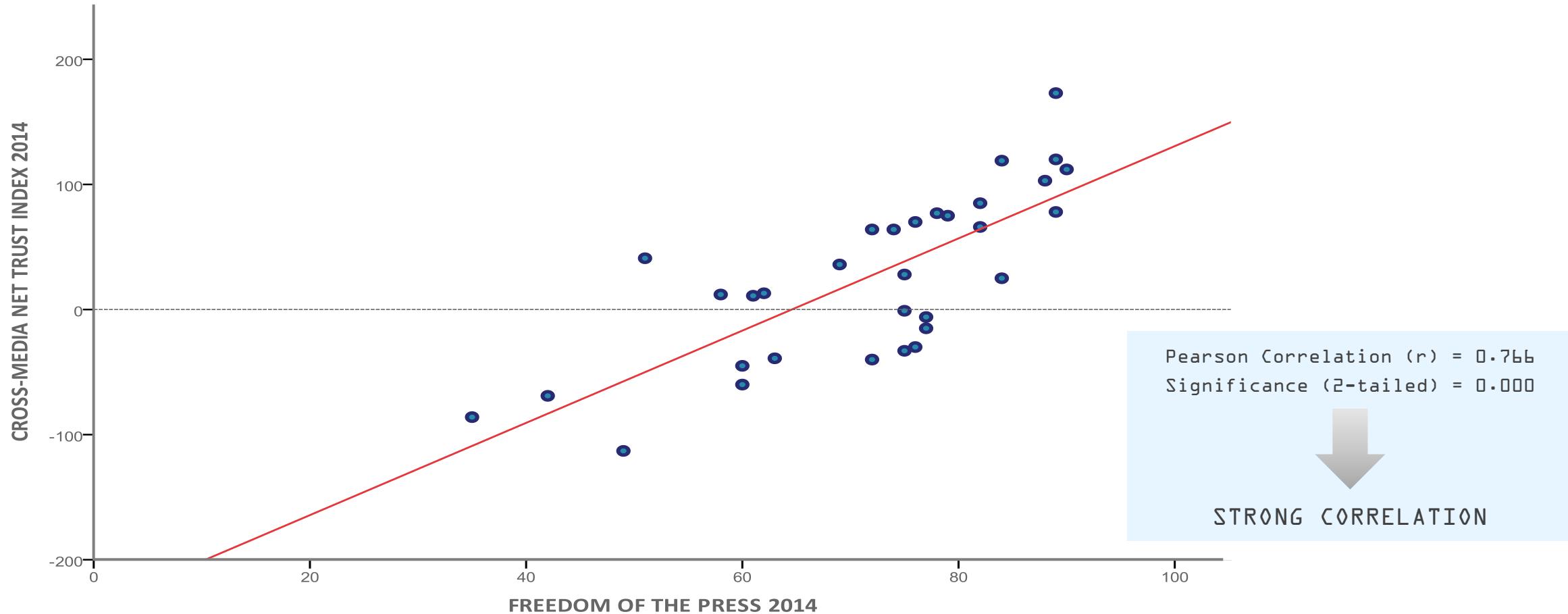
PSM TV MARKET SHARE vs TRUST IN TV



When it comes television, the relationship between PSM organization market share and citizens' trust in TV is not as straightforward as in the case of radio. While there still appears to be a similar relationship – higher PSM TV organization market shares imply higher trust in TV levels –, the correlation is weaker and less significant. Nevertheless, there is still a positive, moderate correlation between the two indicators.

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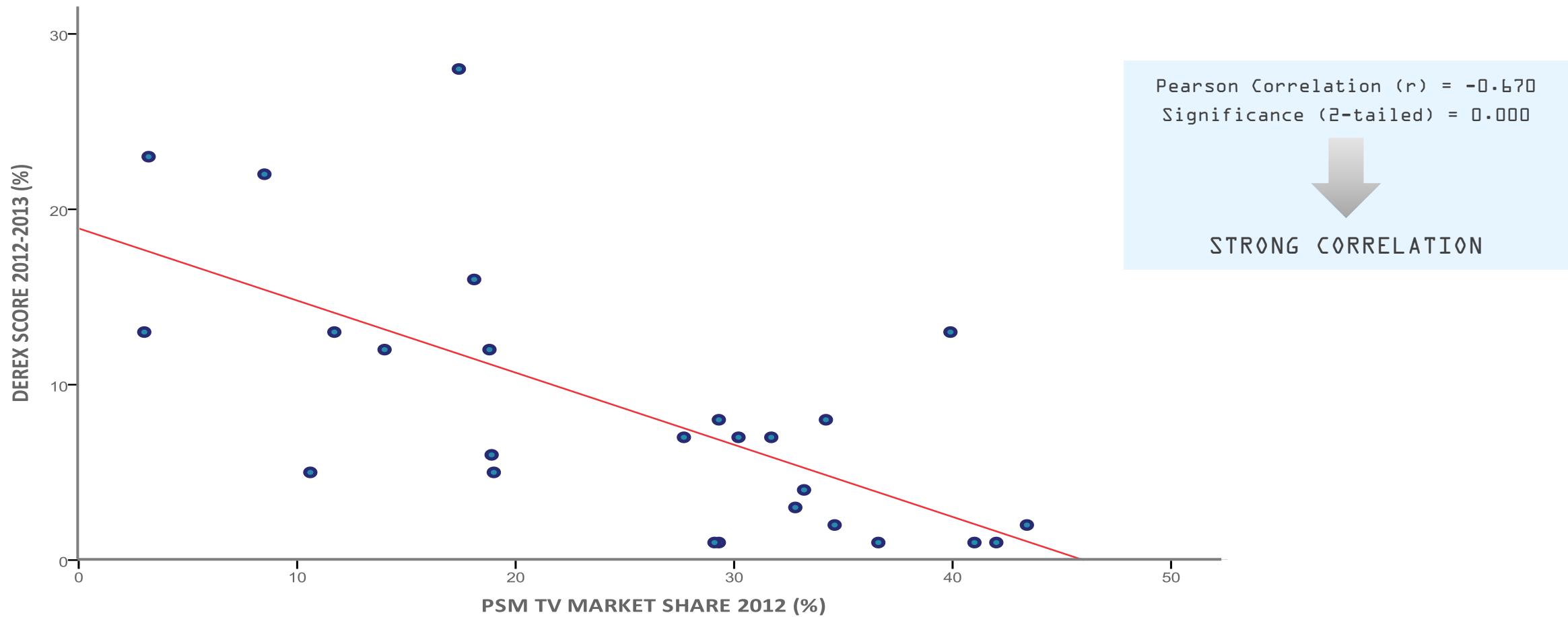
TRUST IN MEDIA vs FREEDOM OF THE PRESS



As media operate in larger social, cultural and political contexts, the level of trust in media can correlate with other indicators too, such as the freedom of the press. The results show a very strong, positive correlation: in the European context, high press freedom levels tend to go together with higher trust in media.

Note: The cross-media net trust index used here represents the sum of the radio, TV, and written press net trust levels, as calculated based on the Eurobarometer. The Freedom of the Press Index is annually published since 1980 by Freedom House, with scores ranging from 0-100: the higher the score, the less press freedom. For clarity's sake, the index for this chart was inverted in order to match higher scores to higher press freedom levels.

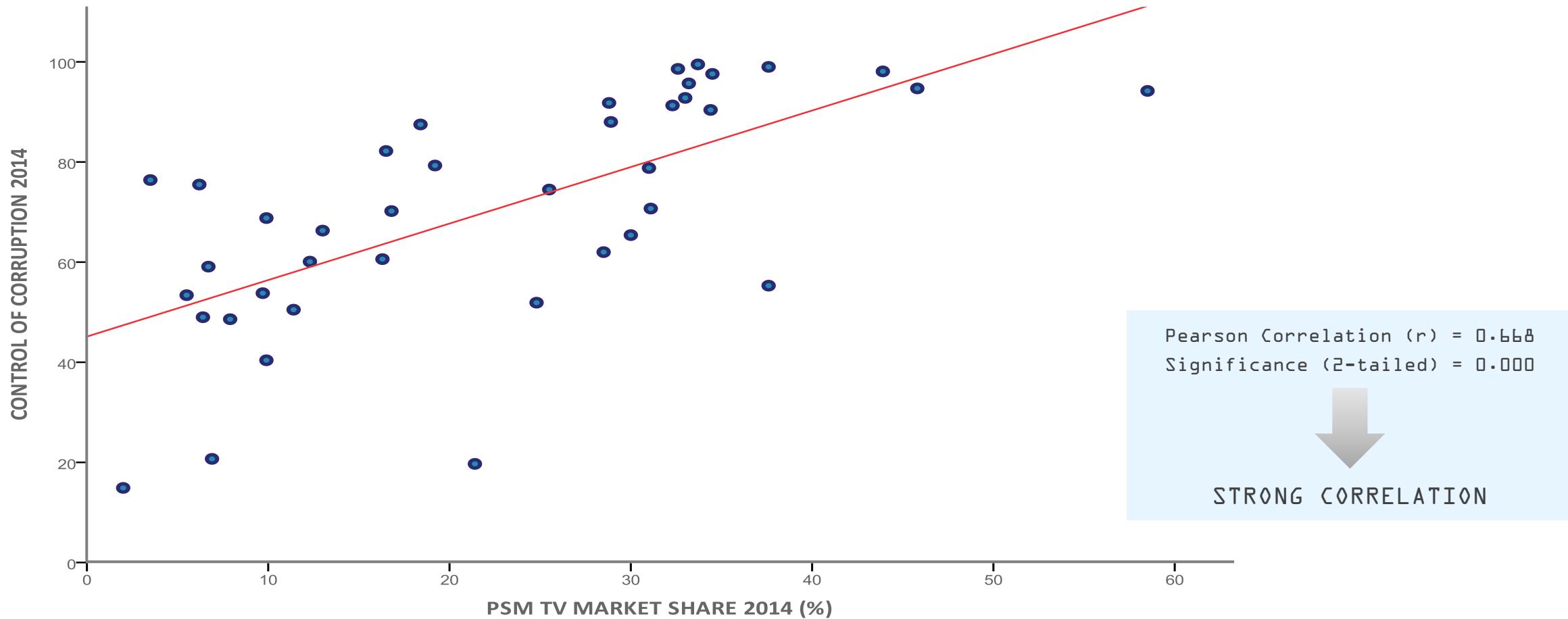
PSM TV MARKET SHARE vs DEMAND FOR RIGHT-WING EXTREMISM



In countries where PSM TV organization market share is higher, the demand for right-wing extremism (DEREX score) tends to be lower. A low DEREX score means there are less people in a given country with extreme right-wing views. This is an important indicator of social cohesion, and suggests that where PSM is valued more by citizens, communities also tend to be more cohesive.

Note: The DEREX Index is based on academic studies that describe psychological traits that people with extreme right-wing views tend to have, and, using this knowledge, on data collected through the European Social Survey.

PSM TV MARKET SHARE vs CONTROL OF CORRUPTION

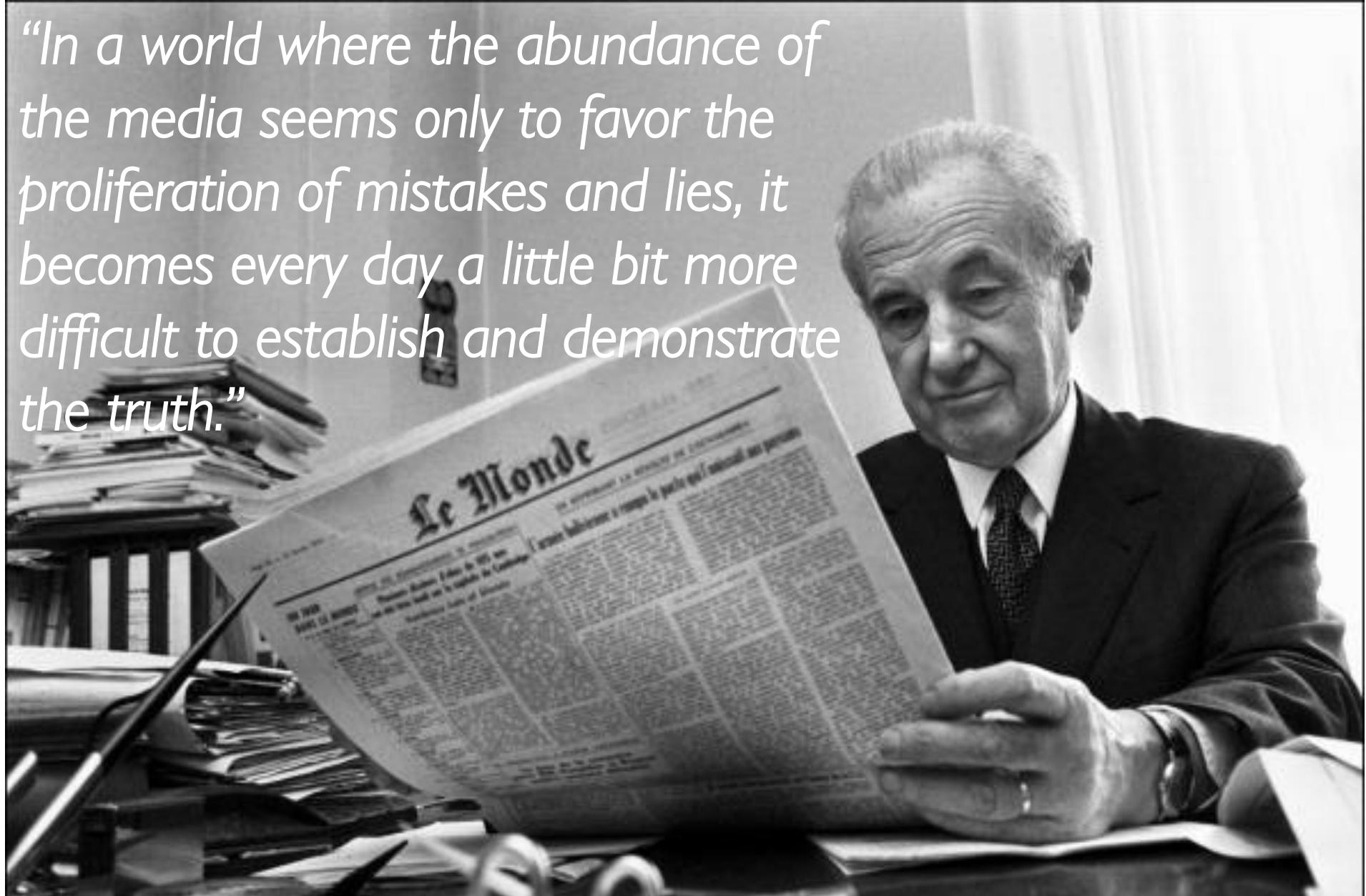


The chart shows that in those countries where PSM has a higher TV organization market share, corruption tends to be more under control. Similarly to the previous observations, this can be a sign that a cherished PSM is more prevalent in societies that hold in high esteem good governance and democracy.

Note: Control of Corruption reflects perceptions of the extent to which public power is exercised for private gain, including both petty and grand forms of corruption, as well as "capture" of the state by elites and private interests. Aggregate indicator (composed of different sub-indicators). Reported as a percentile rank, higher scores indicate less corruption.

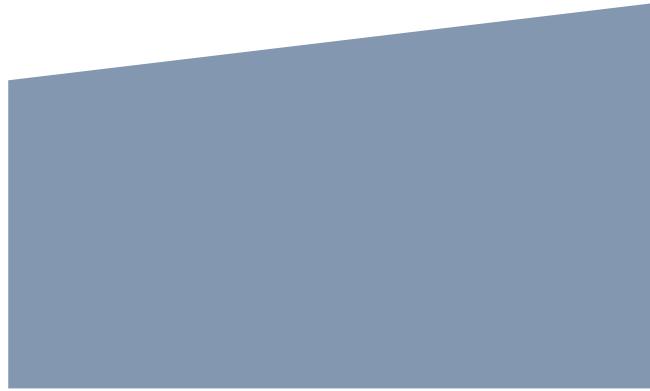
- 
1. THINK WITH A **NEW MINDSET**
 2. THINK ABOUT **NEW TOOLS**
 3. THINK ABOUT WHAT REALLY MATTERS **NOW**
 4. THINK ABOUT WHAT WILL MATTER **IN THE FUTURE**
 5. THINK OUTSIDE YOUR **MATERIAL JURISDICTION**
 6. THINK OUTSIDE YOUR **TERRITORIAL JURISDICTION**
 7. THINK ABOUT **DEMOCRACY**

"In a world where the abundance of the media seems only to favor the proliferation of mistakes and lies, it becomes every day a little bit more difficult to establish and demonstrate the truth."



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 - 4) Think about what will matter in the future
 - 5) Think outside your material jurisdiction
 - 6) Think outside your territorial jurisdiction
 - 7) Think about democracy
- *Beware of regulatory tackiness if not uselessness*



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