

Media: Comment sought on subscription TV inquiry findings

The Independent Communications Authority of SA (Icasa) has published a [draft](#) findings document as the next step in its inquiry into subscription television broadcasting services, reports Pam Saxby for [Legalbrief Policy Watch](#). Gazetted on Friday for comment by 20 June, the document reflects stakeholder input during a consultation process begun in August 2017 with the release of a discussion paper. It also takes account of information from a consumer survey conducted last September. At this stage, the proposed market definition is informed by a value chain that includes ‘over-the-top’ (online) services – along with an analysis of ‘relevant retail markets’. Other key issues covered in the document include the effectiveness of competition across all markets; licensees with significant market power; and pro-competitive licence conditions.

Against that backdrop, the document also explores free-to-air television services (satellite and analogue), basic-tier subscription and free-to-air services, viewing patterns, differences in content, broadband access and related costs, viewer experience, the upstream wholesale market, wholesale ‘must-offer’ obligations, barriers to market entry such as switching costs; brand loyalty; vertical integration; long-term exclusive contracts and their renewal, potential competition following digital migration, premium subscription television services, video-on-demand services, sports rights unbundling and splitting, set top box interoperability, access to Hollywood movies, and the ‘a la carte’ model.

Comments on the draft findings will be reflected in Icasa’s final position paper, which will determine the need for regulatory interventions. The authority’s [media statement](#) on the document identifies three such markets: the retail distribution of basic-tier subscription television services and satellite-based free-to-air television services; the retail distribution of premium subscription television services; and the wholesale acquisition of premium content for distribution in SA.

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