



The e-Commerce Sector Inquiry

Key Findings of the Preliminary Report

Thomas Kramler
Rosario Rende Granata
DG Competition

(The views expressed are not necessarily those of the European Commission)



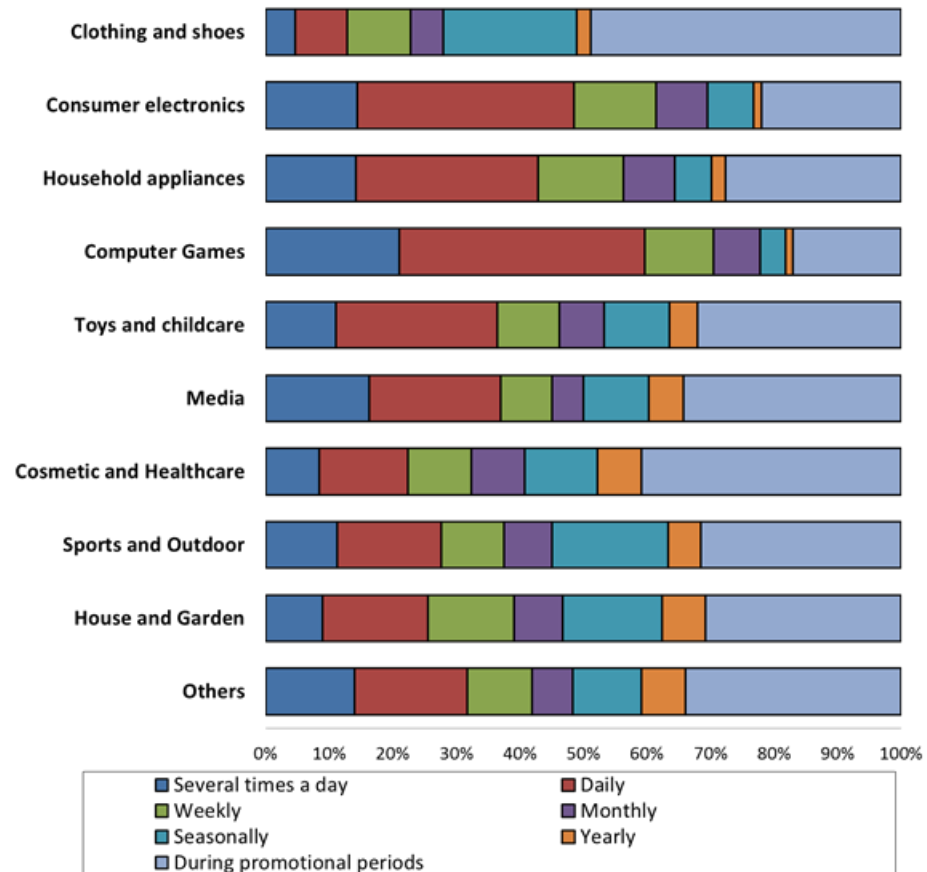
Timeline

- Launched May 2015
- Questionnaires sent until Q2 2016
 - About 1 800 respondents
 - More than 8 000 distribution agreements
- SWD on geo-blocking published March 2016
- Preliminary Report published September 2016
- Final Report due Q1 2017



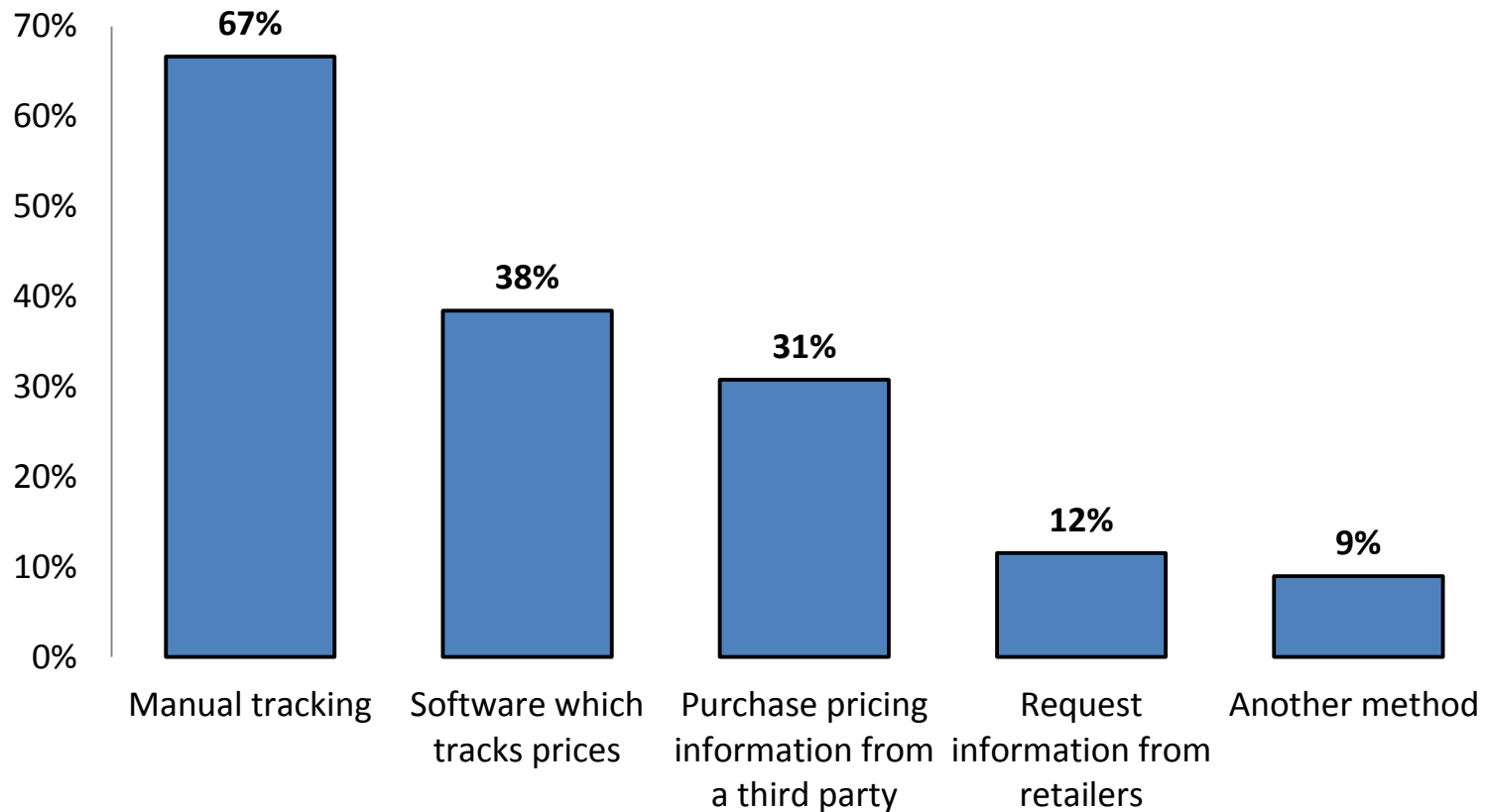
Consumer Goods

Price Transparency



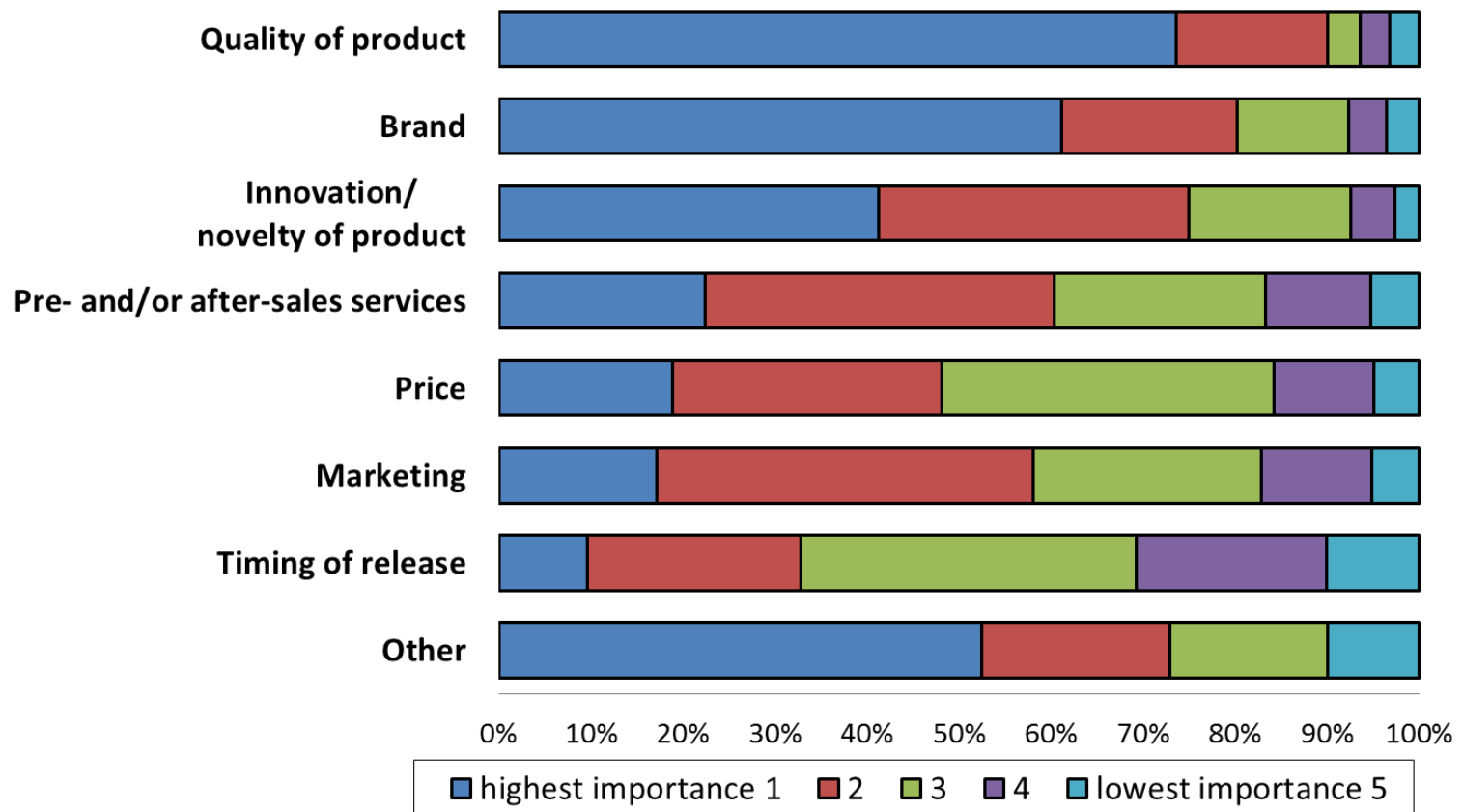
B. 19: Frequency of modifying online prices based on the responses of retailers

Price Monitoring



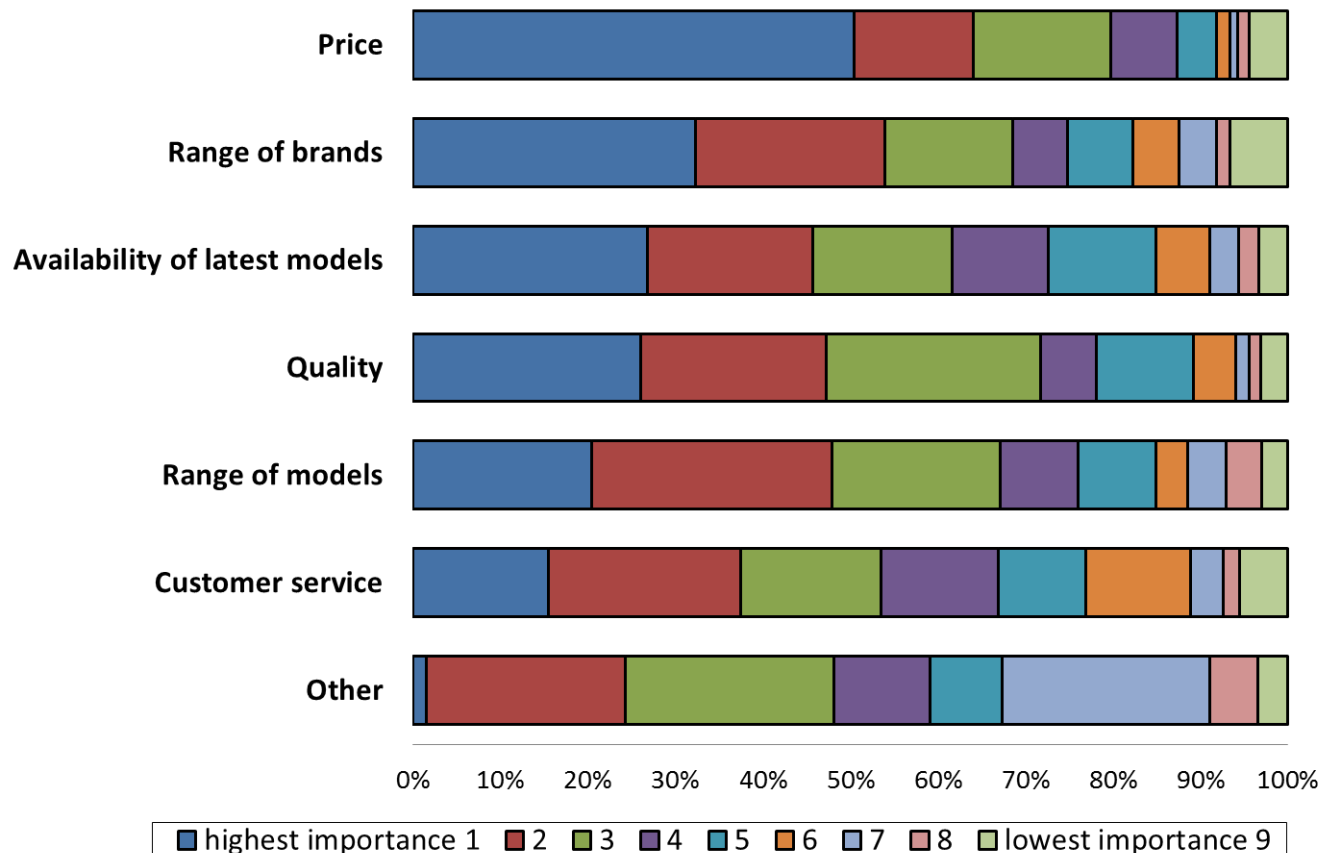
B. 76: Most commonly reported methods of monitoring retail prices by manufacturers

Manufacturers – Drivers



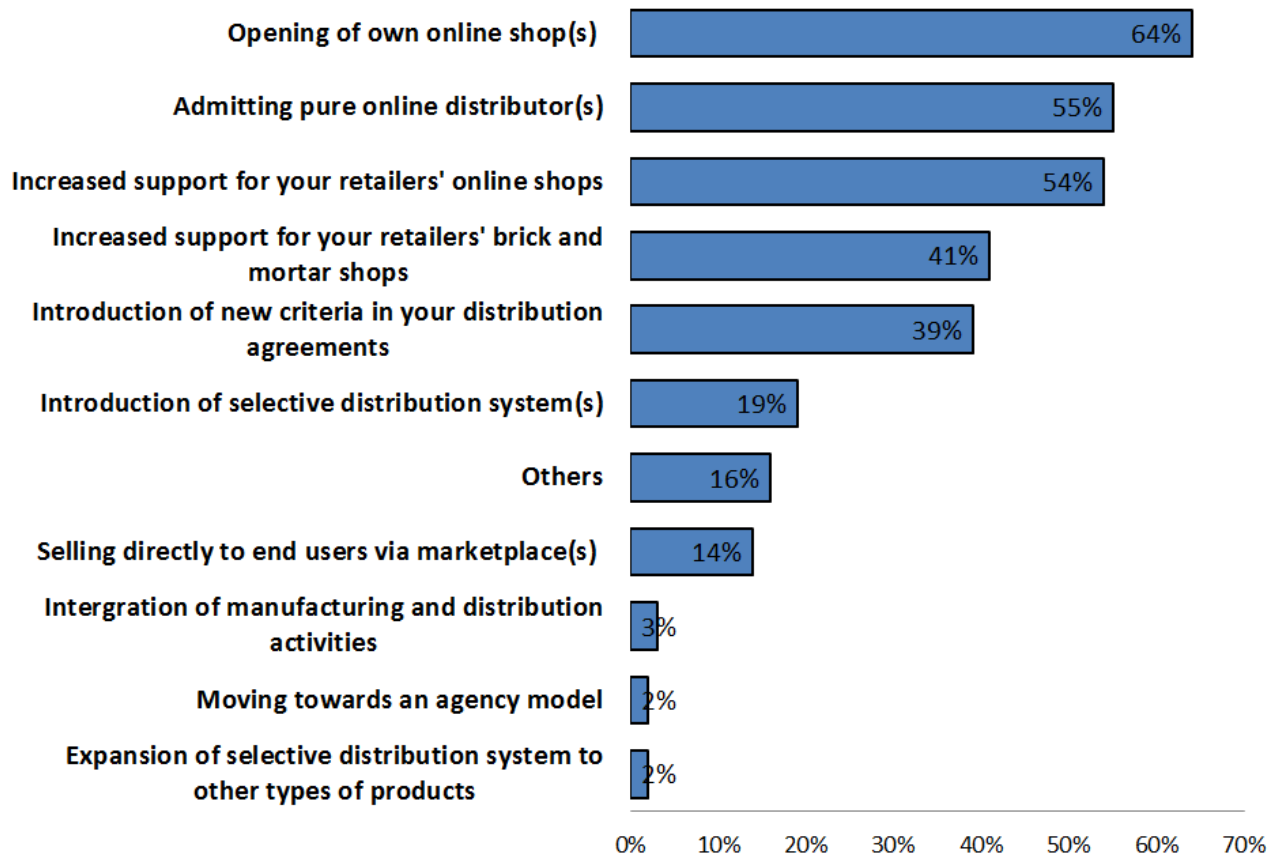
B. 13: Rating the parameters of competition by manufacturers

Pure Online Players – Drivers



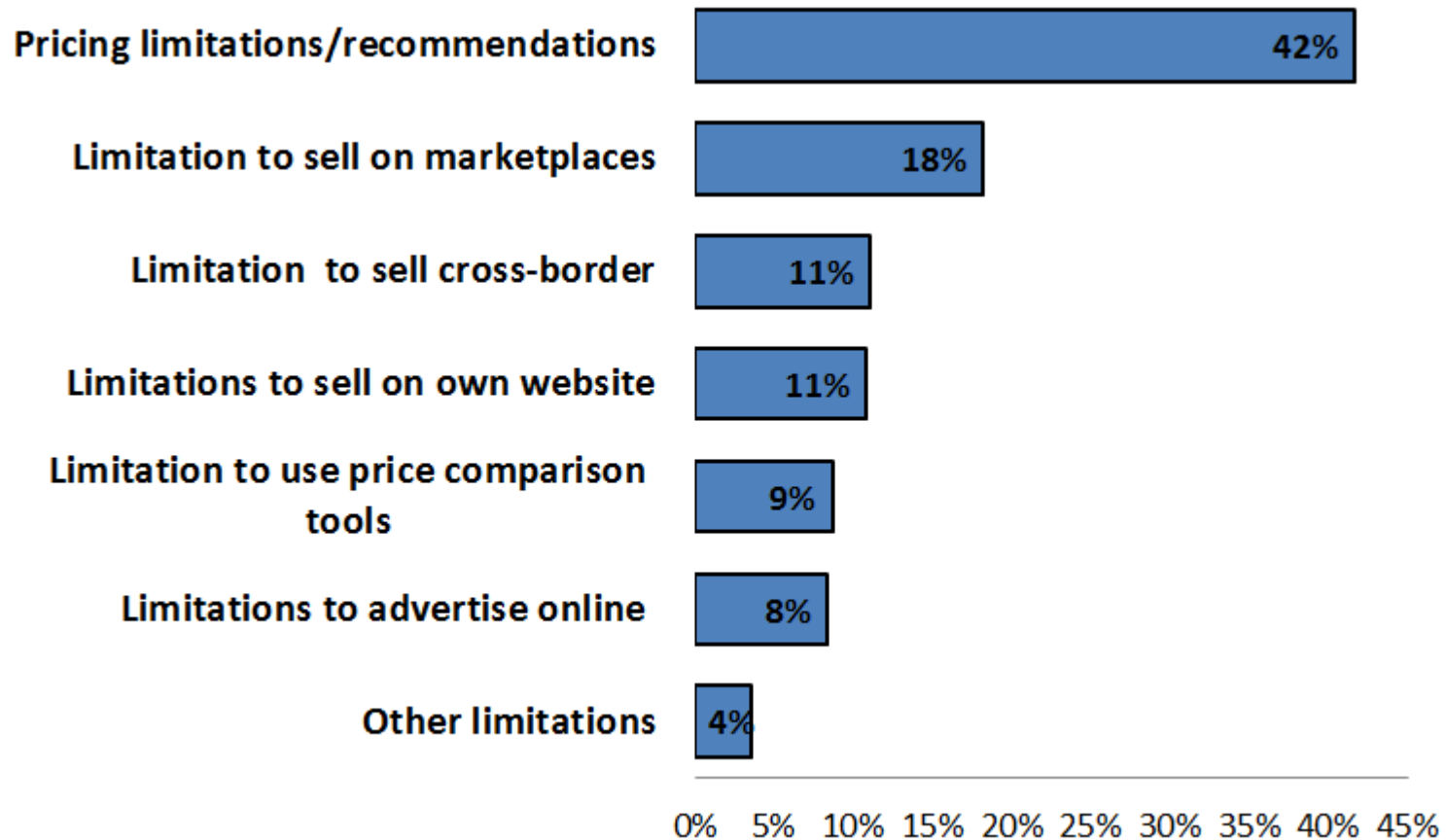
B. 15: Rating the parameters of competition by pure online players

Manufacturers' Strategies



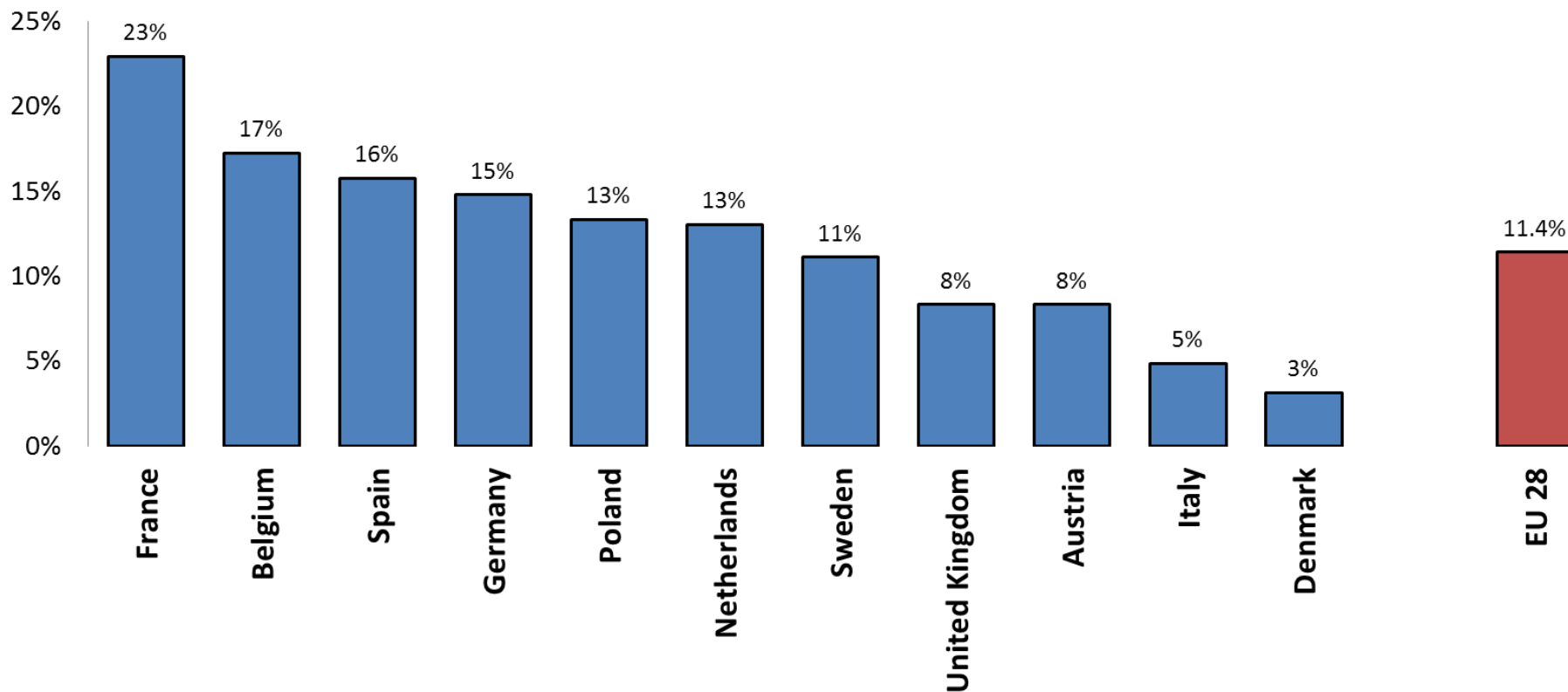
B. 20: Measures taken by manufacturers in the last 10 years to react to the growth of e-commerce

Contractual Restrictions



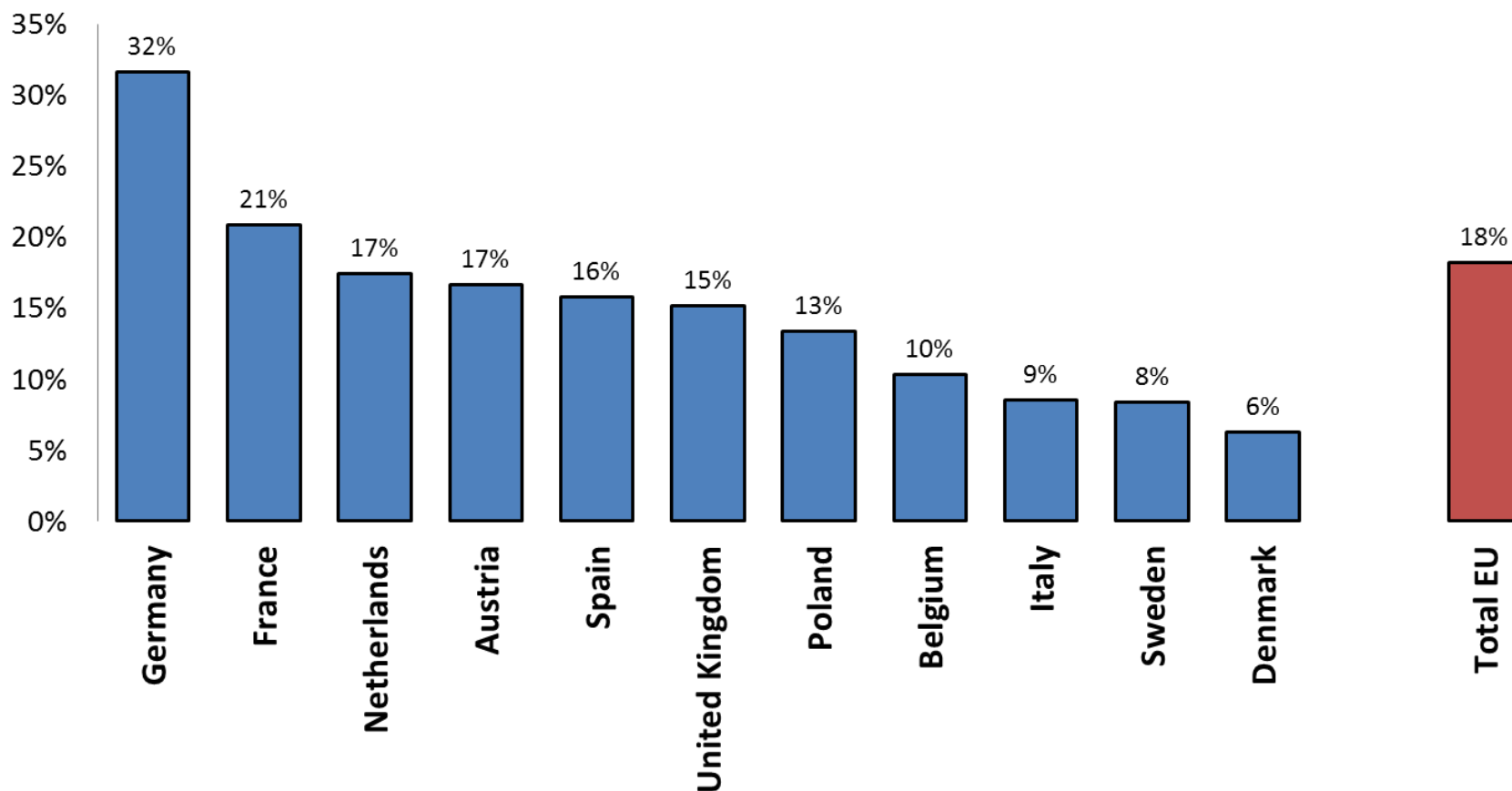
B. 36: Proportion of retailers having contractual restrictions, per type of restriction

Cross-Border Sales Restrictions



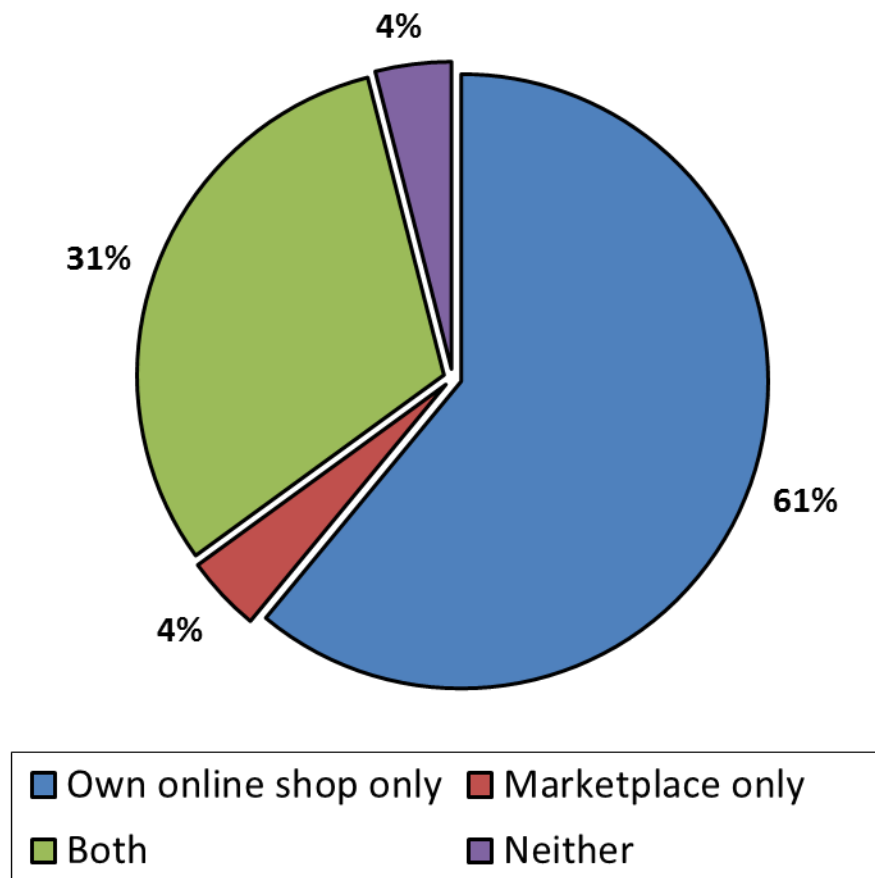
B. 53: Retailers that have contractual restrictions to sell cross-border in at least one product category, by Member State

Marketplace Sales Restrictions



B. 64: Proportion of retailers in each Member State that have agreements containing marketplace restrictions

Relevance of Marketplaces

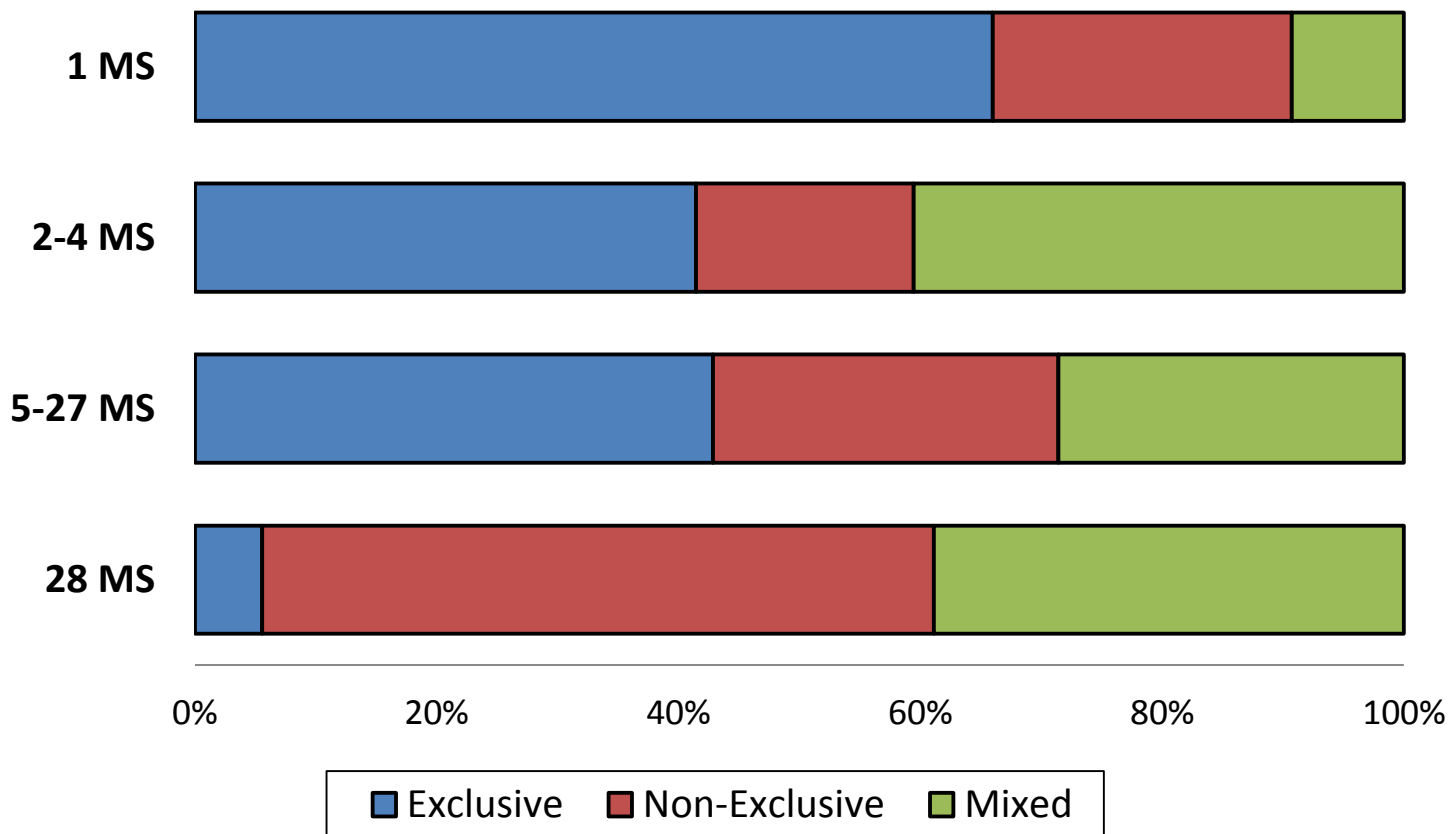


B. 55: Proportion of retailers using different sales channels for selling online



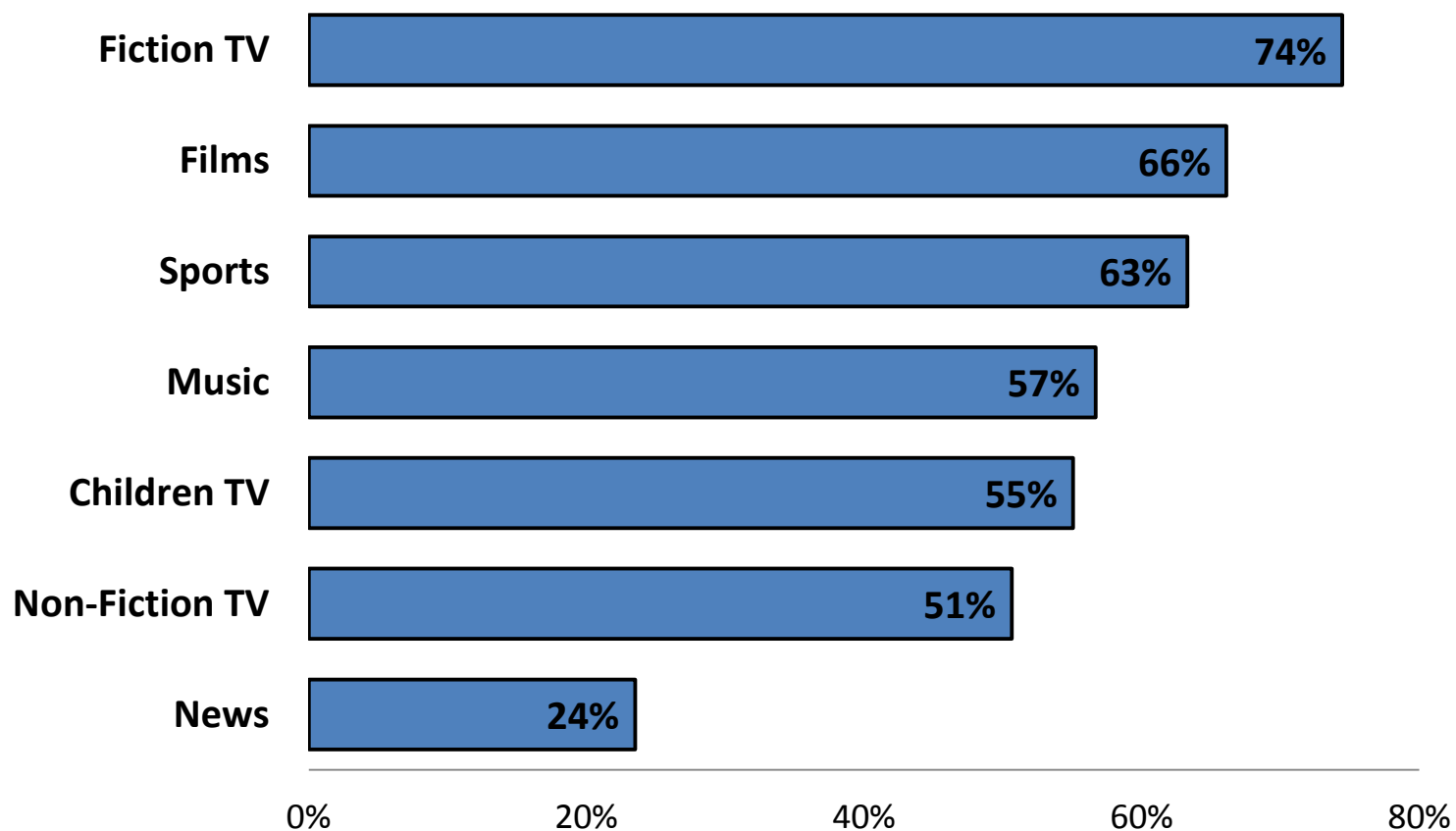
Digital Content

Exclusive Territorial Rights



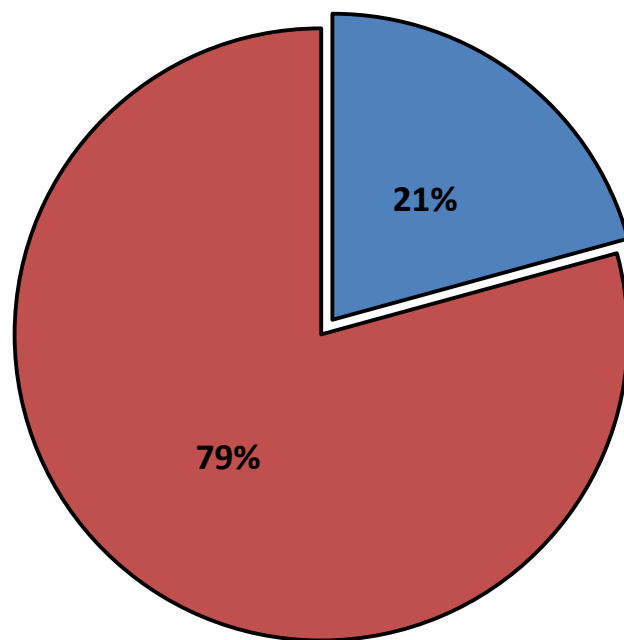
C. 35: Proportion of agreements including exclusive rights licensed for a certain territorial scope – All agreements submitted by right holders

Contractual Geo-Blocking



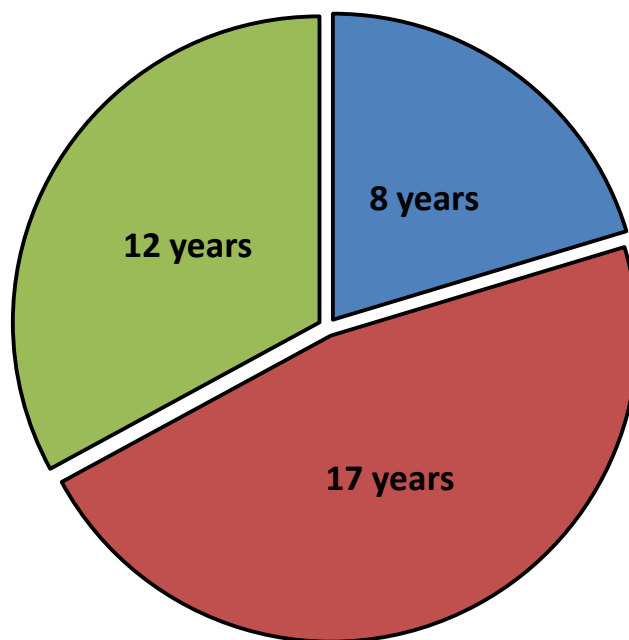
C. 42: Proportion of agreements requiring providers to geo-block by category – Average for all respondents – EU 28

Bundling Online Rights



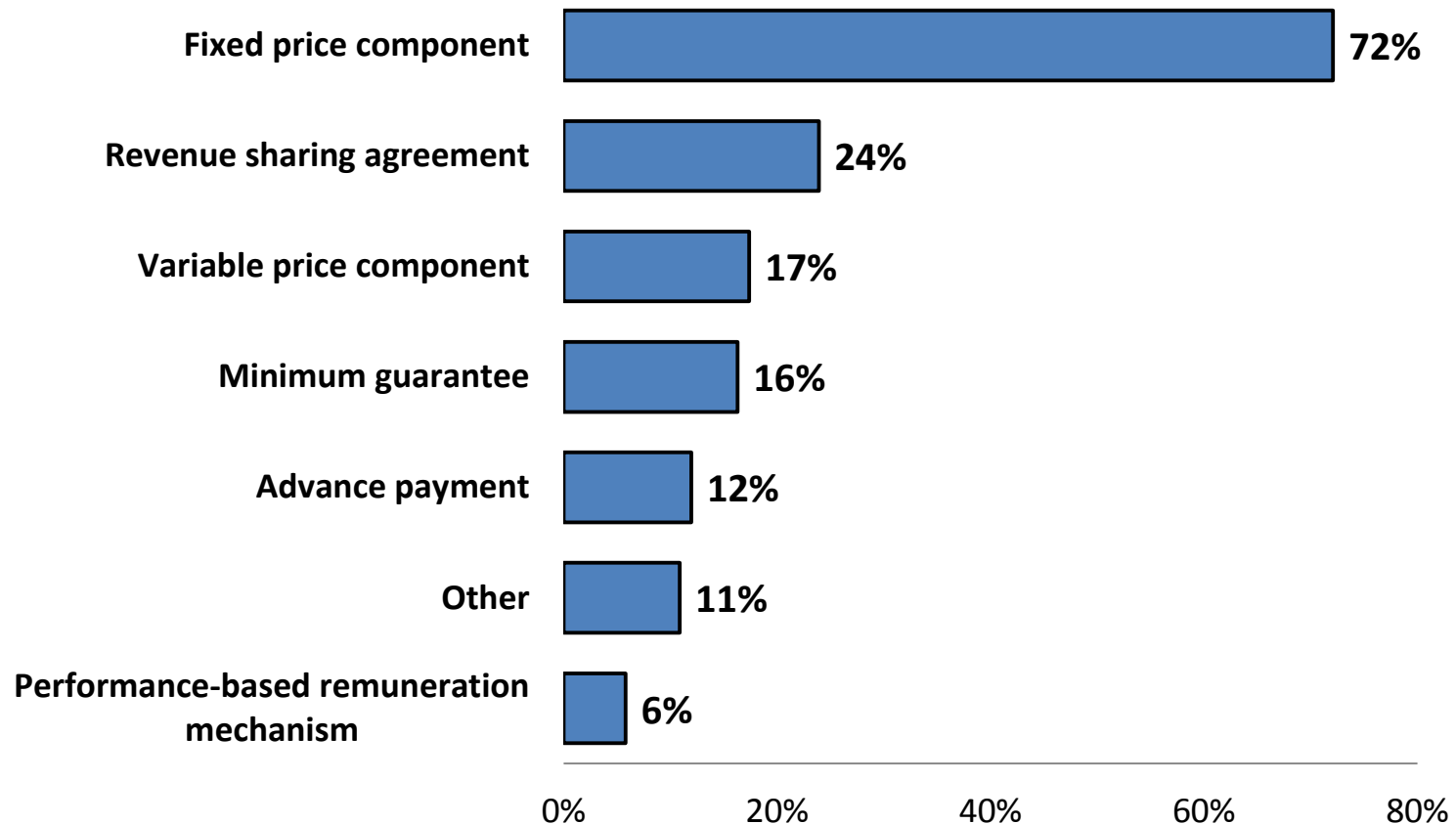
C. 27: Proportion of agreements that contain online rights together with other technologies – All agreements submitted by content providers

Duration of Contractual Relationships



**C. 65: Average length of the contractual relationship - All agreements submitted by right holders
- Per genre**

Payment Structure



C. 72: Proportion of agreements including each specific payment mechanism – All agreements submitted by right holders

Key Findings – Consumer Goods

- More price transparency and price competition
- More selective distribution and vertical integration of manufacturers
- Vertical Restraints
 - Pricing restrictions
 - Territorial restrictions
 - Online sales restrictions

Key Findings – Digital Content

- Availability of licences for online distribution is key for competition
- Impact of current licensing practices on competition?
- Potential issues to be assessed case by case
 - Geo-blocking
 - Scope of agreements (Bundling)
 - Duration of agreements



Public Consultation

Comments by **18 November 2016**

All comments should be sent to the following e-mail address:

COMP-E-COMMERCE@ec.europa.eu