

# Spectrum: getting the balance right

How changes in spectrum policy could affect terrestrial TV services in the UK and Europe

## 1 DTT – the backbone of TV delivery



■ Live or recorded TV  
■ On-demand  
■ Other [6%]<sup>1</sup>

Digital Terrestrial Television (DTT) is widely used across Europe, serving 250 million viewers. Around 20 million homes in the UK rely on DTT services such as Freeview, BT TV and YouView. DTT shares its infrastructure and spectrum and with others, including radio broadcasters and programme-makers.

Availability of on-demand TV is changing viewing behaviour, but most viewing in the UK remains to live TV.

DTT's scale and reach ensures universal access to public service broadcasting.

In the UK alone, around 30 billion hours of TV a year is watched via DTT.

UHF spectrum is the lifeblood of DTT. Ongoing access to the full 470–694MHz band will safeguard investment in new channels and hybrid TV services such as Freeview Play.

## 2 The drive for efficiency

Broadcasters have made great strides in using the spectrum more efficiently

With gains of up to 70% possible, the mobile industry must now follow suit<sup>2</sup>

Higher frequency bands are better suited to next generation 5G mobile services

Mobile demand for UHF airwaves has 'substantially diminished' – Ofcom<sup>3</sup>

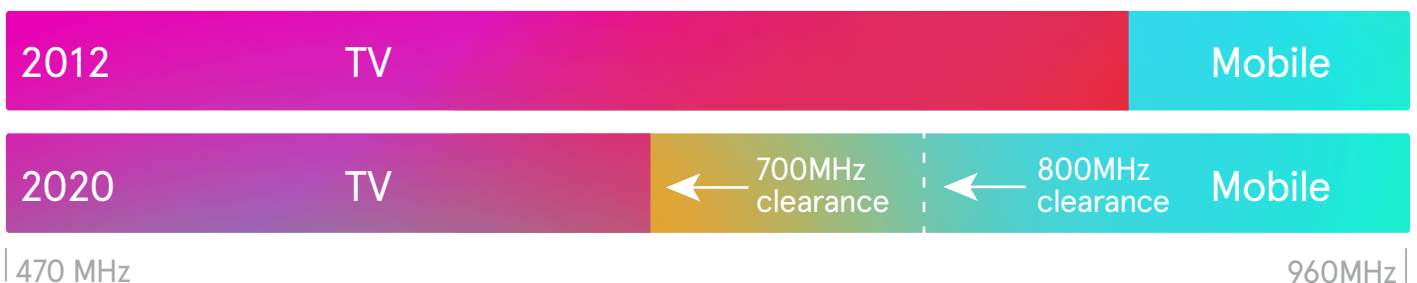
Terrestrial broadcasters have spent years clearing airwaves for mobile use and investing in more efficient video encoding technologies which require less spectrum.

Digital switchover in 2012 saw television signals cleared from the 800MHz band with a further handover of the 700MHz band due to be completed by mid-2020.

Releasing the 700MHz band is costing UK taxpayers around £600m. The cost across Europe will be up to €4 billion.



### UHF spectrum



## 3 A balanced approach - 2020 and beyond

The next global review of UHF spectrum is scheduled for the World Radiocommunication Conference in 2023 (WRC 23). With the 700MHz clearance programme not complete until 2020, any attempt to bring this debate forward to WRC 19 would be premature and risk poorly-informed decisions.



WRC 23 is the earliest a review of UHF use by mobile and broadcast should take place

Broadcasting will continue to be critical to meeting our television needs. Fixed and mobile broadband networks lack the capacity to deliver a robust and reliable TV service; and both UK regulators and the European Commission agree that DTT will continue to be important throughout the 2020s and beyond.

**!** Further cuts to the TV spectrum would fatally erode a vital TV delivery platform

## 4 Policy goals

Broadcasters are seeking a balanced approach from policy makers, acknowledging the growing demand for mobile data but also the continuing importance of terrestrial broadcasting. Four policy goals should inform UHF spectrum policy to sustain both sectors and allow them to meet public demand for their services:

- 1

Ensure a stable spectrum environment for broadcasting, enabling investment and growing consumer choice.
- 2

Stick to the agreed 2023 timetable for the review of broadcasting and mobile spectrum requirements.
- 3

Any review of UHF must remain broad in scope, exploring the spectrum needs of broadcasting and mobile operators.
- 4

Explore options for mobile operators to 'self-help' through more efficient use of their existing spectrum.