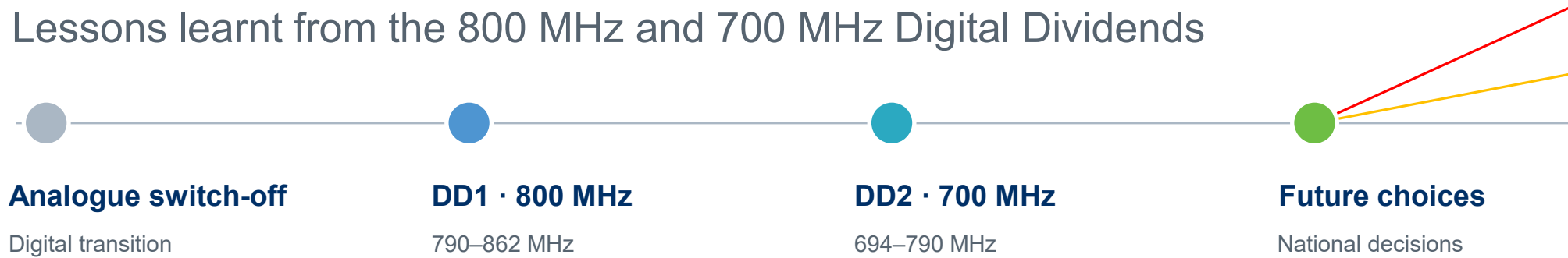


# FROM DIGITAL DIVIDENDS TO NATIONAL CHOICE

Lessons learnt from the 800 MHz and 700 MHz Digital Dividends



**The future question is not whether Europe must repeat the past.  
It is how to enable different national choices.**

# More and better services in progressively less spectrum



## CITIZENS SUPPORT

- More contents & quality
- Digital universal FTA platform
- Better mobile BB connectivity

## TECHNICAL CHALLENGES

- Network rollout and frequency planning
- Receiver support, communication and retuning
- International coordination and replanning
- Aerial adaptation, filters and funding
- LTE-800 interference and receiver overload

- General adoption of HD + some UHD
- Digital universal FTA platform continuity
- Additional mobile 4G/5G BB

- Large-scale retuning and phased clearance
- Technology migration, PMSE coexistence
- Border coordination and very limited planning margin
- DVB-T2 migration

**Each step enabled more and better services in progressively less spectrum, while increasing the complexity and cost of the transition.**

# A spectrum migration moves an entire ecosystem, not just frequencies

## TECHNICAL CHALLENGES



### REPLAN NETWORKS

**FRANCE · 14 clearance phases**

ALL COUNTRIES SITE-BY-SITE MIGRATION:  
transmitters must be reconfigured across the network.



### COORDINATE BORDERS

**IRELAND · 4 years of coordination**

POLAND · bilateral changes with Ukraine + GE06  
modifications



### MANAGE INTERFERENCE

**FRANCE · 138,000+ B800 cases  
18,500+ B700 cases**

· SPAIN–PORTUGAL paths up to 212 km  
FINLAND 54,000+ LTE-800

## CITIZENS SUPPORT



### ADAPT RECEPTION

**FRANCE · filters + ANFR support**

UNITED KINGDOM · free in-home help for  
vulnerable viewers



### FUND THE TRANSITION

**SPAIN · aerial adaptation support**

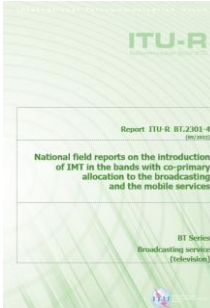
FRANCE · MNO-funded interference-removal  
equipment via ANFR



### PROTECT VIEWERS

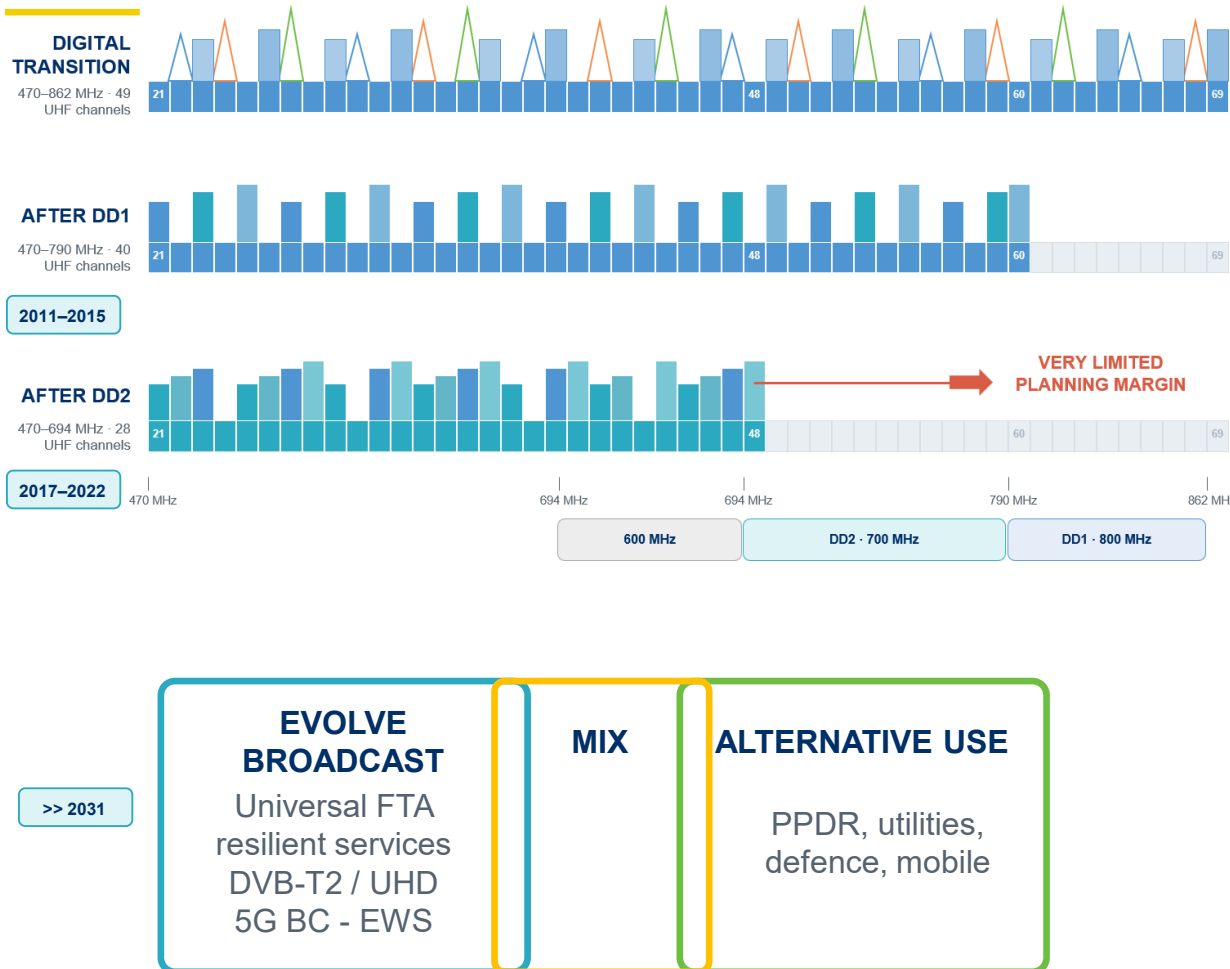
**UK · local ads + on-screen messages**

CROATIA · receiver certification, communication +  
call-centre support



**Spectrum migration is a highly complex process, requiring interventions across  
broadcasting sites, extensive coordination and significant investments and  
resources to ensure a successful transition while minimising disruption for citizens**

# Looking to the future, past success does not make further change simple



One band, different legitimate national choices.

The right toolbox should enable national choice, not prescribe one common change.

# Real flexibility and useful toolbox protect **every** national choice

1

## PROTECT ESSENTIAL INFRASTRUCTURE

Universal coverage  
Resilience  
European sovereignty

2

## ENABLE NATIONAL CHOICE

Maintain DTT  
Modernise broadcast  
Consider alternatives

3

## DO NOT EXPORT THE COST OF CHANGE

No forced migration  
No imposed disruption  
No one-size-fits-all outcome

Evidence: compensation, phased migration, filters and bilateral agreements were repeatedly required across Europe.

**FLEXIBILITY MEANS DIFFERENT NATIONAL CHOICES, NOT ONE IMPOSED CHANGE.**

**Terrestrial broadcasting remains essential to universal coverage, resilience and European sovereignty.**

THANK YOU

# Different national choices. One coordinated European framework.

Questions & discussion



Terrestrial networks operators serving 19 countries

|                    |                     |             |                                   |                    |            |
|--------------------|---------------------|-------------|-----------------------------------|--------------------|------------|
| <br>United Kingdom | <br>Belgium         | <br>Austria | <br>Spain, Belgium<br>Netherlands | <br>Czech Republic | <br>Greece |
| <br>Finland        | <br>Italy           | <br>Italy   | <br>Poland                        | <br>Serbia         |            |
| <br>Estonia        | <br>Germany         | <br>Croatia | <br>Ireland                       |                    |            |
| <br>Romania        | <br>France, Estonia | <br>Sweden  | <br>Slovakia                      |                    |            |

