ASBU/Seminar Tunis 20-21/10/2026



5G BROADCAST HORIZONS FOR EUROPE

Progress, Trials and Commercial Deployment

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Broadcast Networks Europe (BNE)

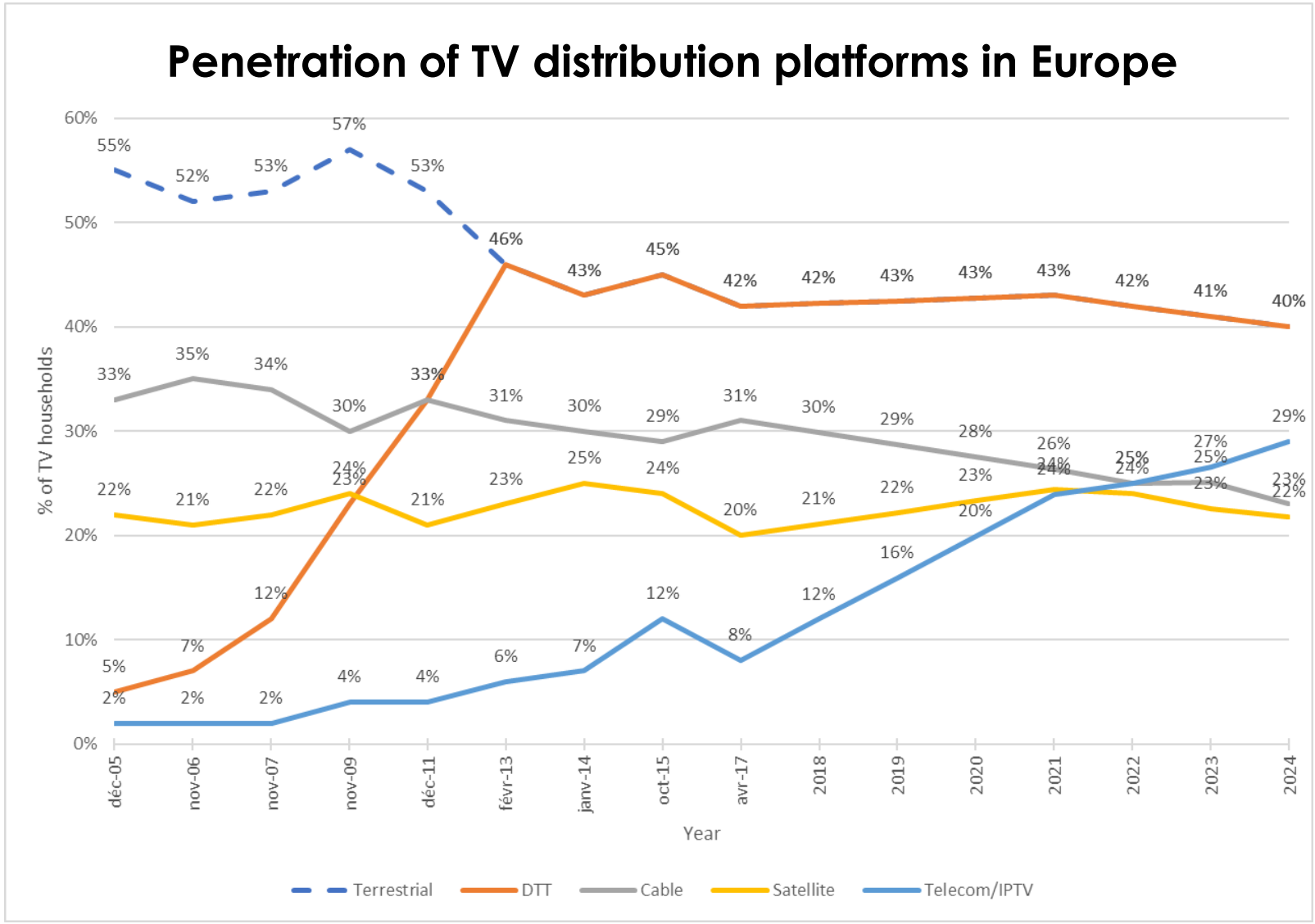
Why 5G Broadcast? Serving essential Societal priorities



Terrestrial networks operators serving 19 countries

arqiva United Kingdom	Belgian Tower Company Belgium	BIG BLUE MARBLE Austria	cellnex Spain, Belgium Netherlands	CRA ČESKÉ RADIOKOMUNIKACE Czech Republic	Digea Greece
DIGITA Finland	EI TOWERS Italy	ELETTRONICA INDUSTRIALE Italy	emitel Poland	ETB Serbia	
levira Estonia	Media Broadcast Germany	OIV Digital signals and networks Croatia	2rn Ireland		
RADIOCOM Romania	TDF France, Estonia	teracom Sweden	TOWERCOM Slovakia		

Terrestrial television is a very resilient platform

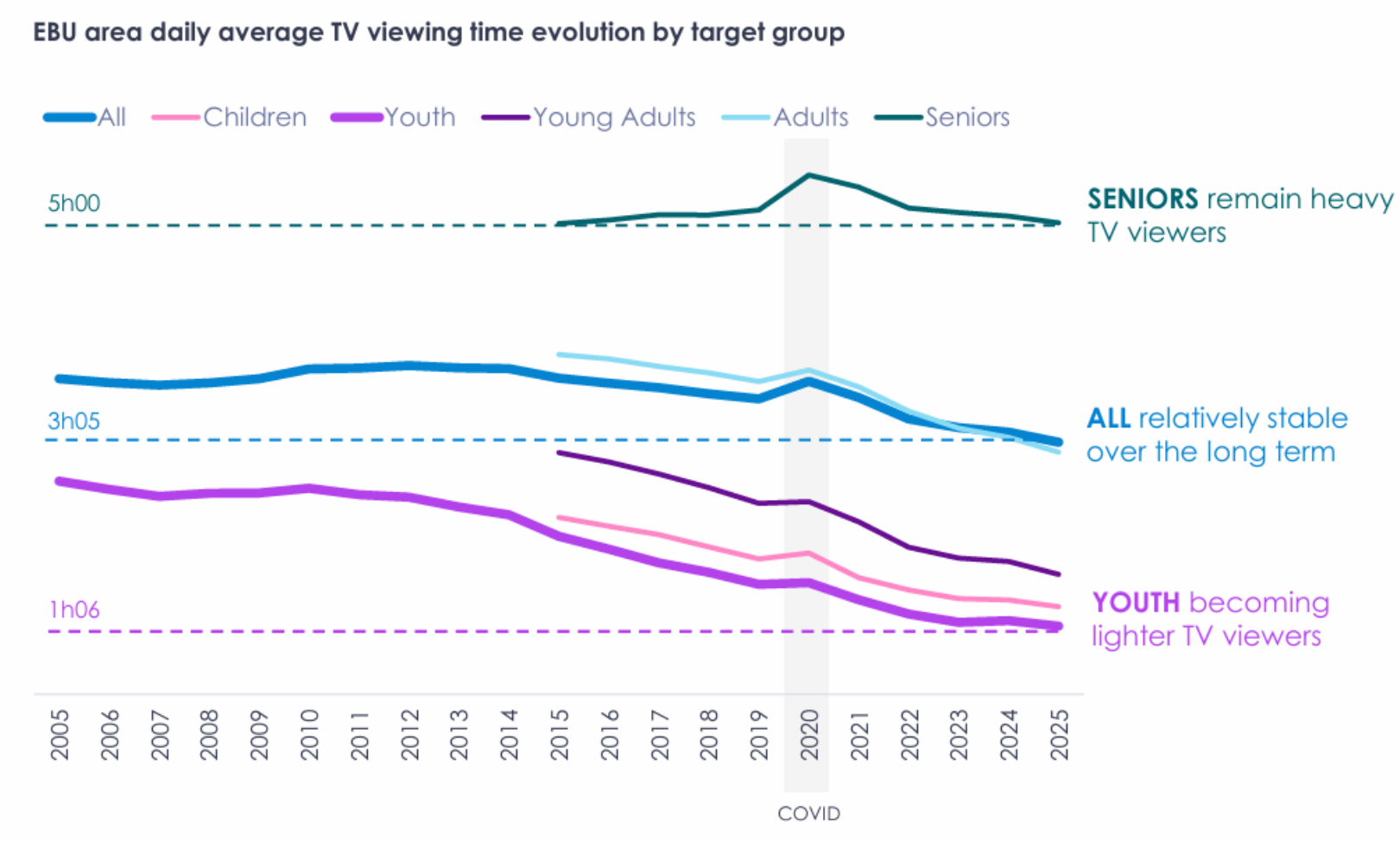


- DTT has had a very quick take up
- Strong presence among European households
- Strong competition from IP (even more if we include OTT distribution)

Sources: Eurobarometer; EBU-BNE DPM database 2025

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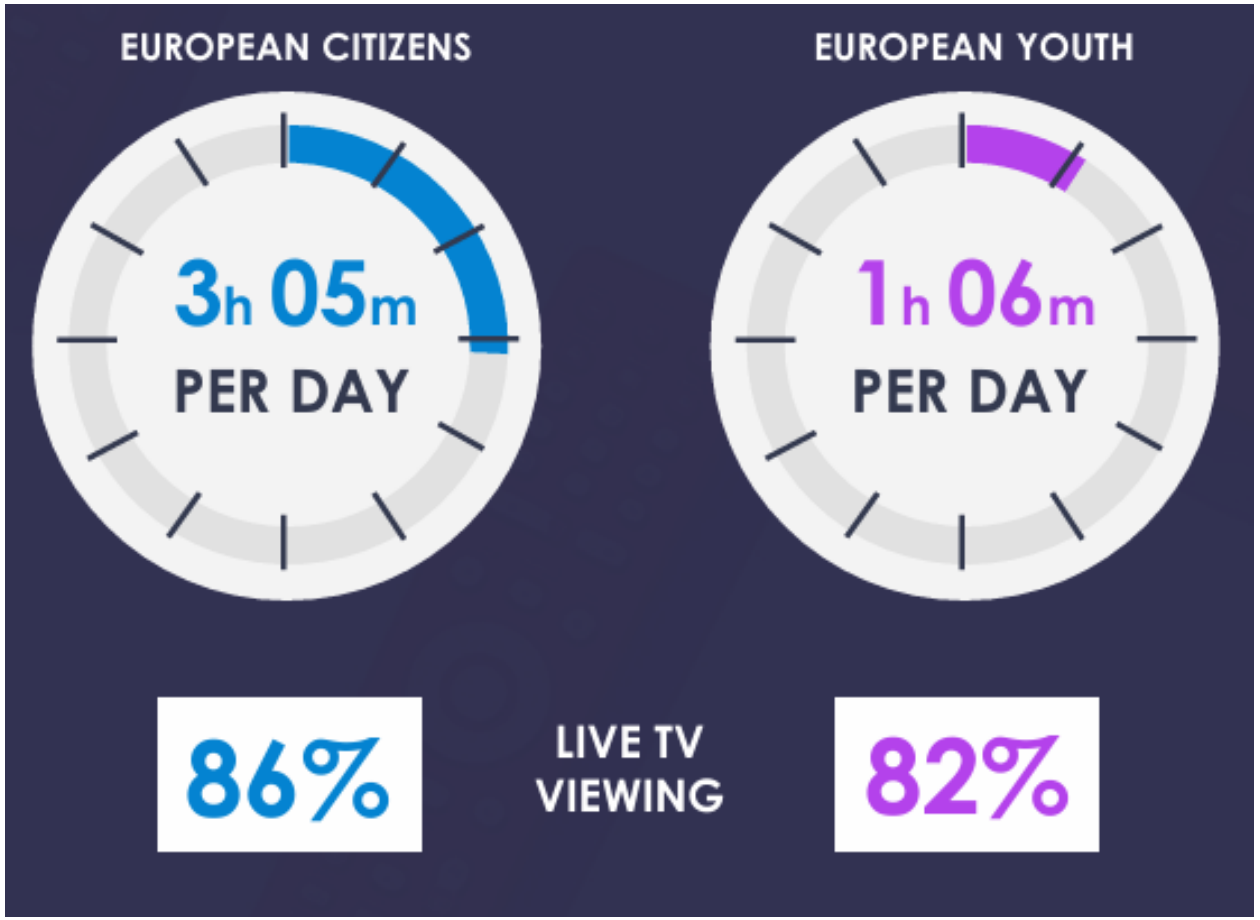
Usages are changing



Source: EBU, 2026

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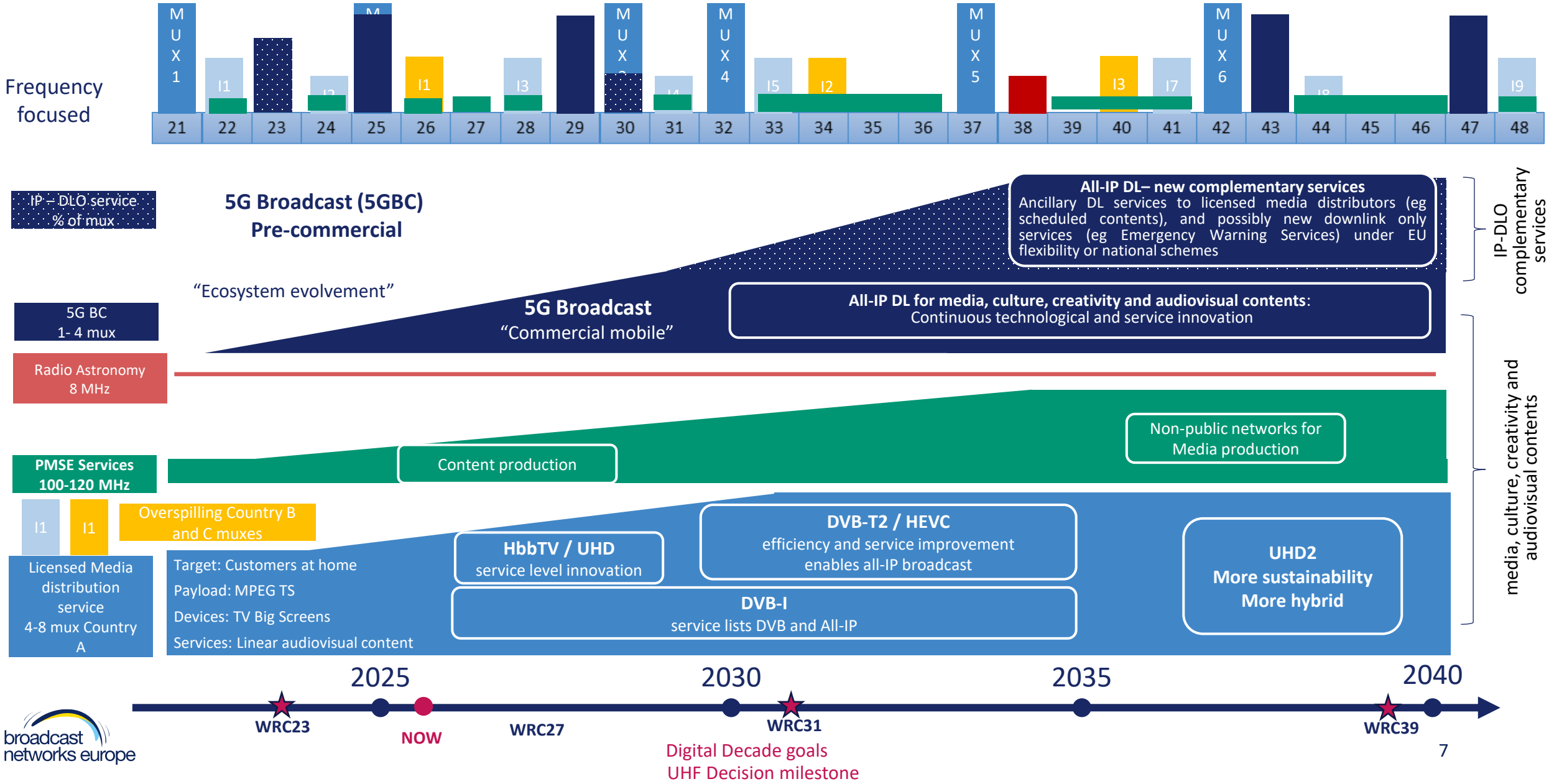
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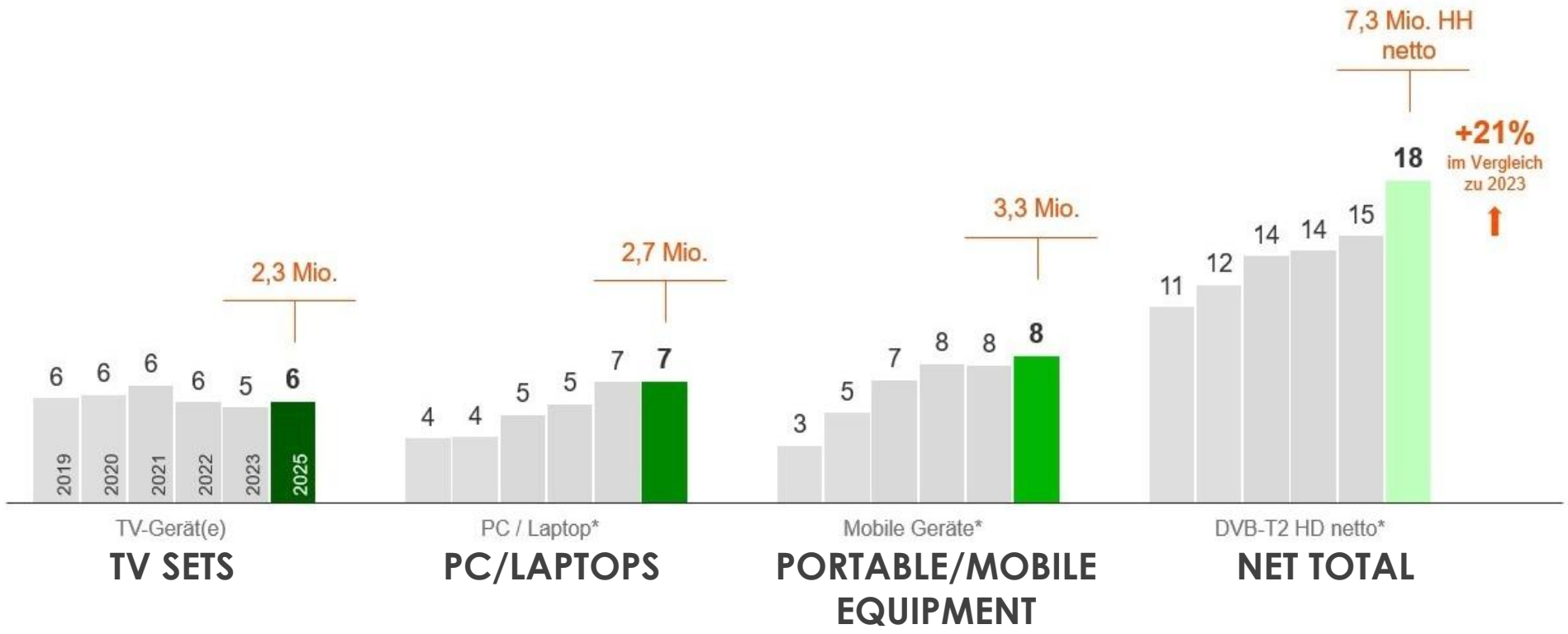
Terrestrial broadcast innovation roadmap for more quality, hybrid interactivity and mobility in a scarce UHF spectrum



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Consumption changes reveal the way to go

DTT uptake in Germany 2019-2025
in **million** and **%** of households

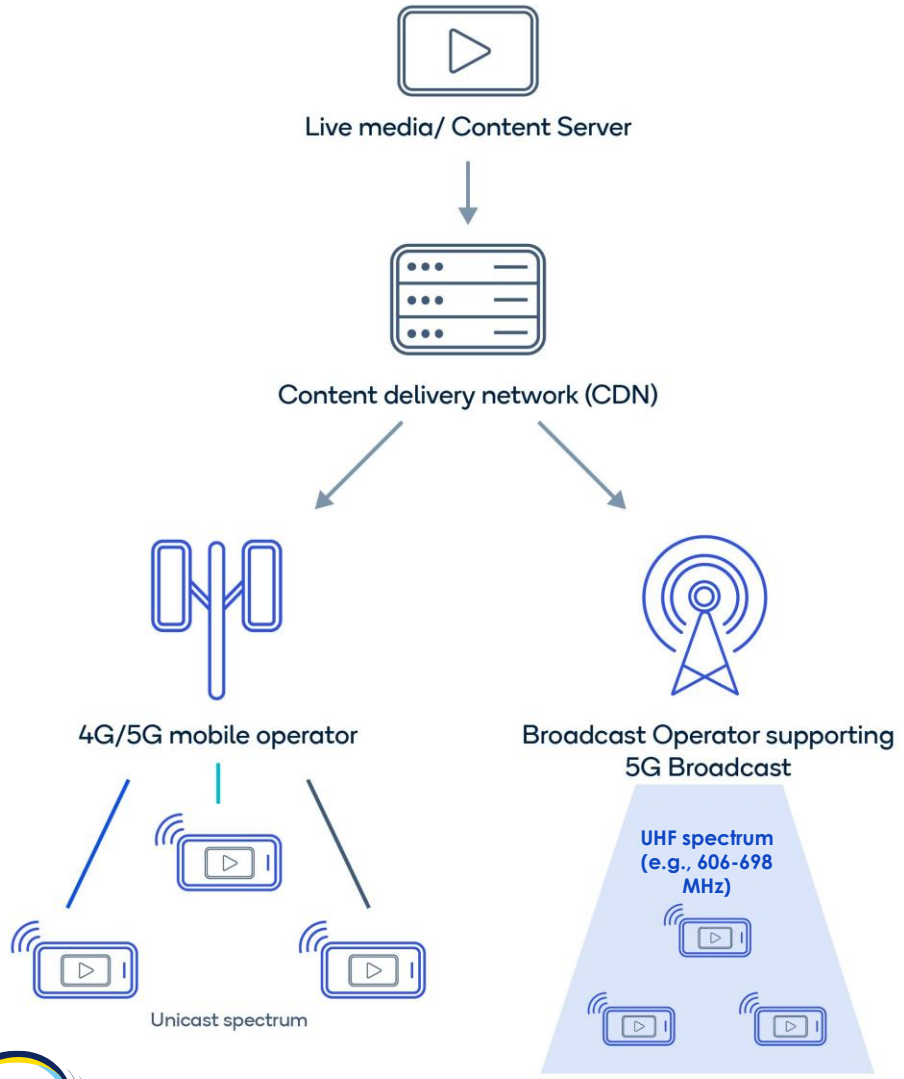


Source: Kantar for Media Broadcast

- DTT reach is growing in Germany
- Reaching 18% of households in 2025
- Sustained by the development of portable and 'mobile' usages

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What is 5G Broadcast? Native convergence of AV and mobile internet



Source: based on Qualcomm

Broadcast UX + smartphone UI

- Future proof 3GPP complement to fixed delivery modes (DTT, satellite, fiber)
- Direct delivery to mobile devices
- Free-to-air, universal service
- Quality of service, no buffering
- Resilient even in extreme conditions
- Independent from SIM card
- No data consumption
- Less carbon footprint
- Seamless switching experience



1st Use Case

Mobile live content...

... no congestion

... no spinning wheel

... no SIM-card

... no data consumption

... with very low latency

... seamless switching possible

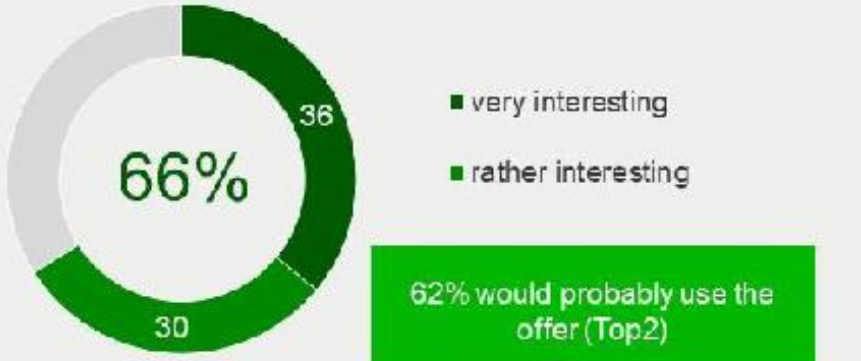
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Consumer interest- Germany (June 2024)

TV To-Go: strong interest

The product presentation arouses interest in two thirds of respondents, and one third even finds “TV To-Go” “very interesting.”

Product Interest



Relevance Features



KANTAR

Question: How interesting do you find "TV To-Go" as an offer for live television reception on your smartphone or tablet in general? / And how relevant are the individual advantages of "TV To-Go" for you personally?; Figures in percent
Base: Online users aged 16-69 in Germany (n=2,127)

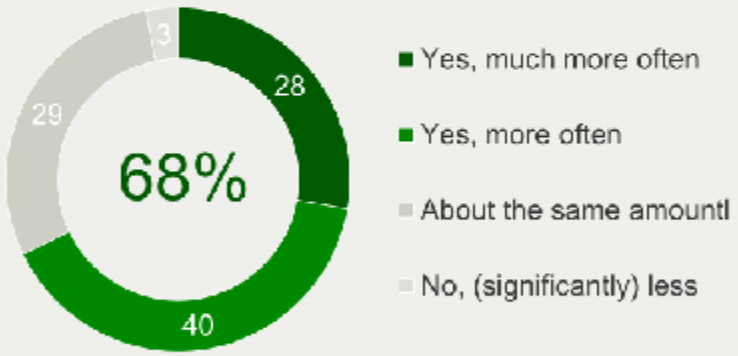
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Consumer interest- Germany (June 2024)

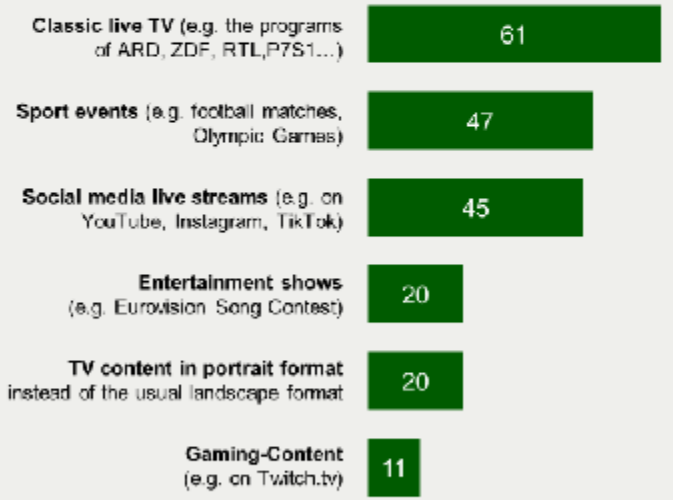
Perspectively used content

The majority of those interested assume that "TV To-Go" would lead to greater personal use of live content on the go.

More frequent use of live content on the go



Perspective use of content on the go



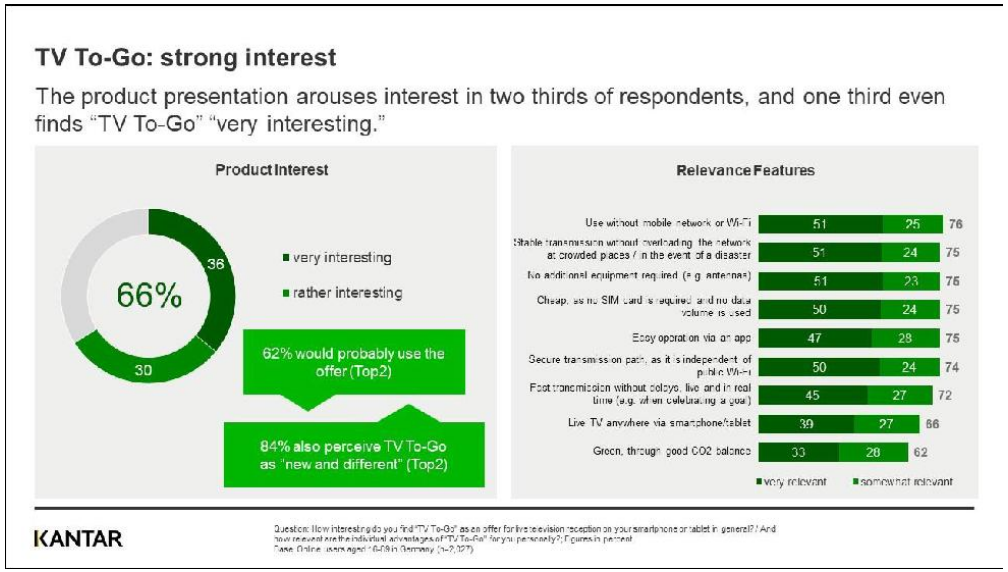
KANTAR

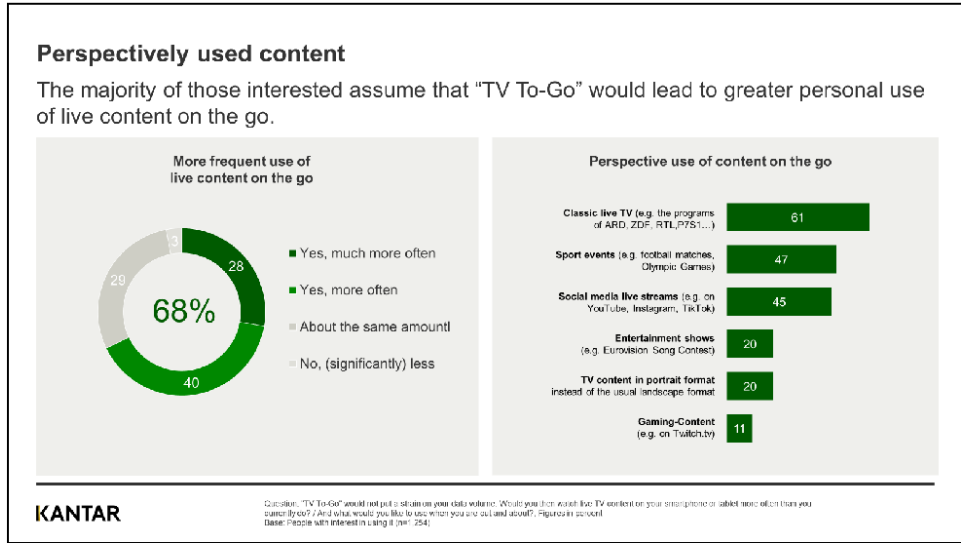
Question: "TV To-Go" would not put a strain on your data volume. Would you then watch live TV content on your smartphone or tablet more often than you currently do? / And what would you like to use when you are out and about?, Figures in percent
Base: People with interest in using it (n= 254)

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Consumer interest- Germany (June 2024)

- Two thirds of respondents find 5G Broadcast (very) interesting
- The most relevant feature is independence of the mobile network or Wi-Fi
- There is particular interest in linear television programs when using on the move



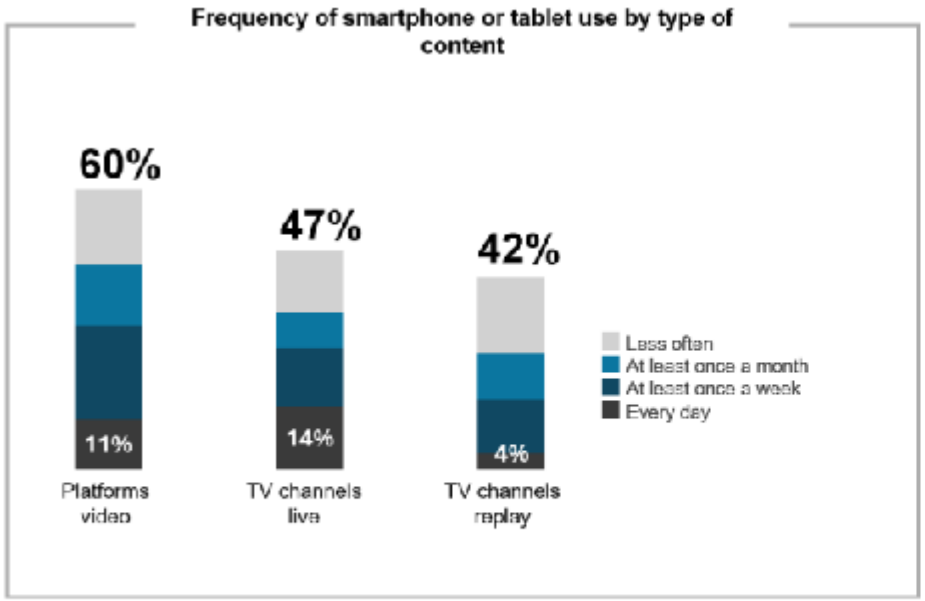


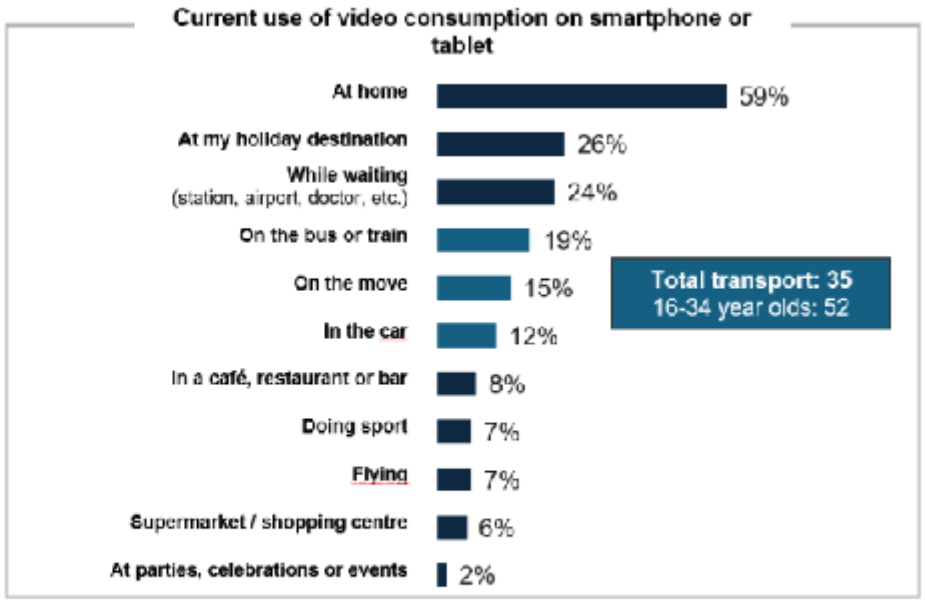
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Consumer interest- France (January 2025)

72% of French people consume video content on their small screen

Mostly at home, but also in transport situation



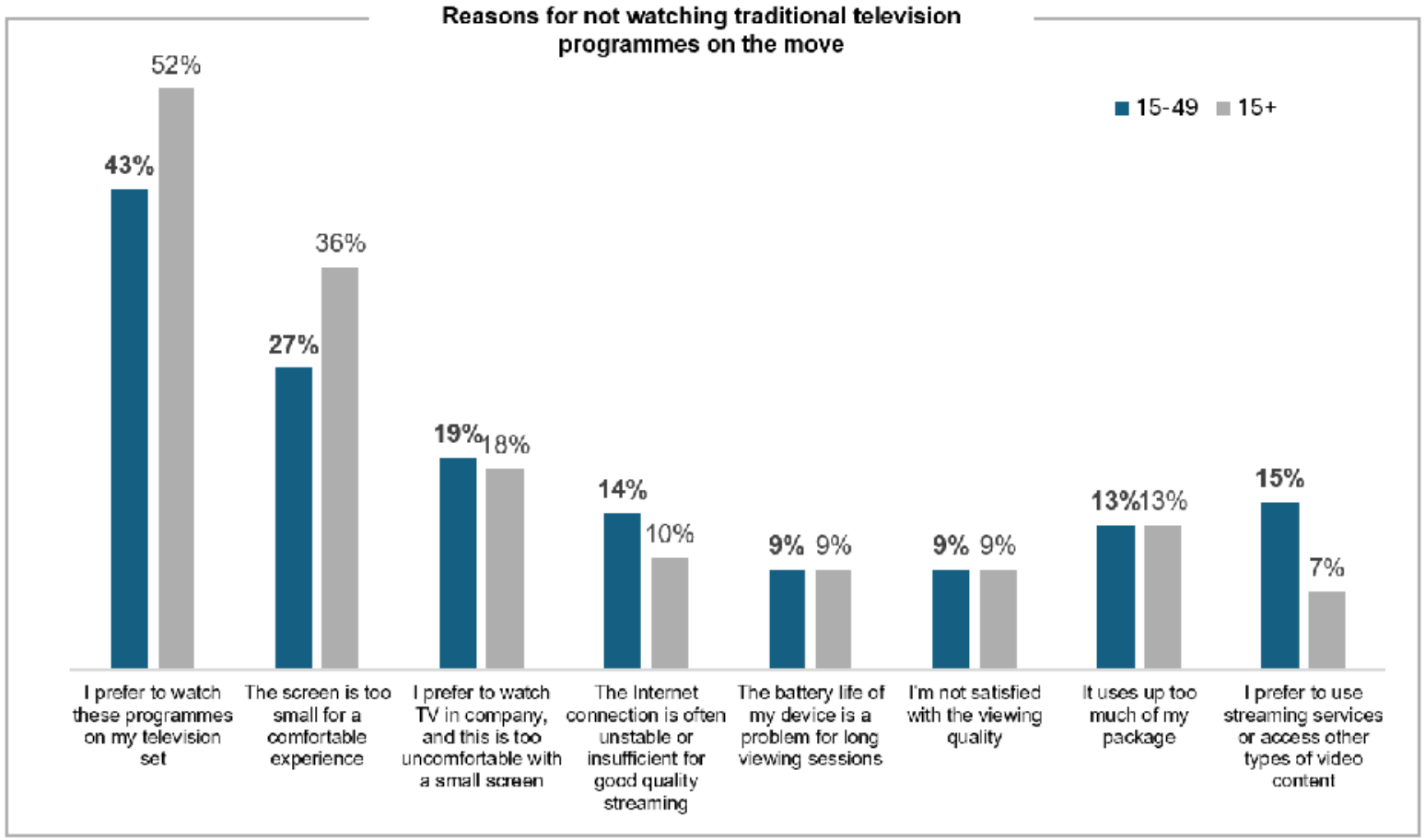


Sources: Kantar field study in the form of a CAWI questionnaire conducted in January 2025 among 2,045 Kantar panelists aged 16 and over, representative of the French population in terms of age, gender, occupation and region (UDA9).

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Consumer interest- France (January 2025)

Obstacles to higher usage in mobility

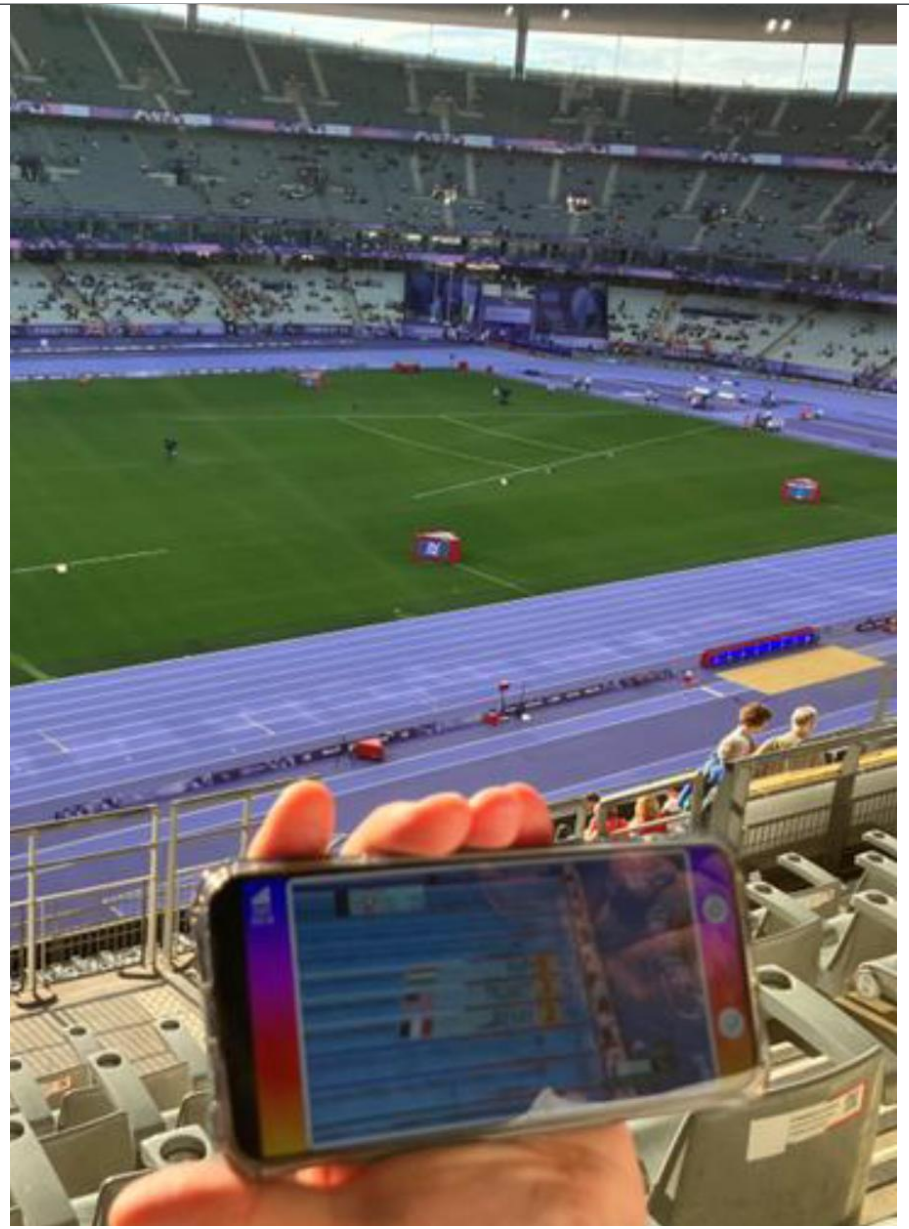


Sources: Kantar field study in the form of a CAWI questionnaire conducted in January 2025 among 2,045 Kantar panelists aged 16 and over, representative of the French population in terms of age, gender, occupation and region (UDA9).

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Consumer interest- France (January 2025)

- More than one in two 15–49-year-olds say they are ready to use 5G Broadcast to watch TV on the move.
- 78% of potential users of the service would consume more on the move because their mobile data would be preserved,
- 77% would increase their usage because the battery would be preserved



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2nd Use Case

Integrated warning functionality …

… based on the most robust broadcasting network, which has been providing guaranteed service for decades.

- One-To-Many Network can't overload
- Very resilient High tower sites
- Only 2-3 sites to cover metropole areas
- Fitting well in the multi channel alerting strategy at the heart of national resilience model

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Example: Public warnings via 5G Broadcast in Estonia

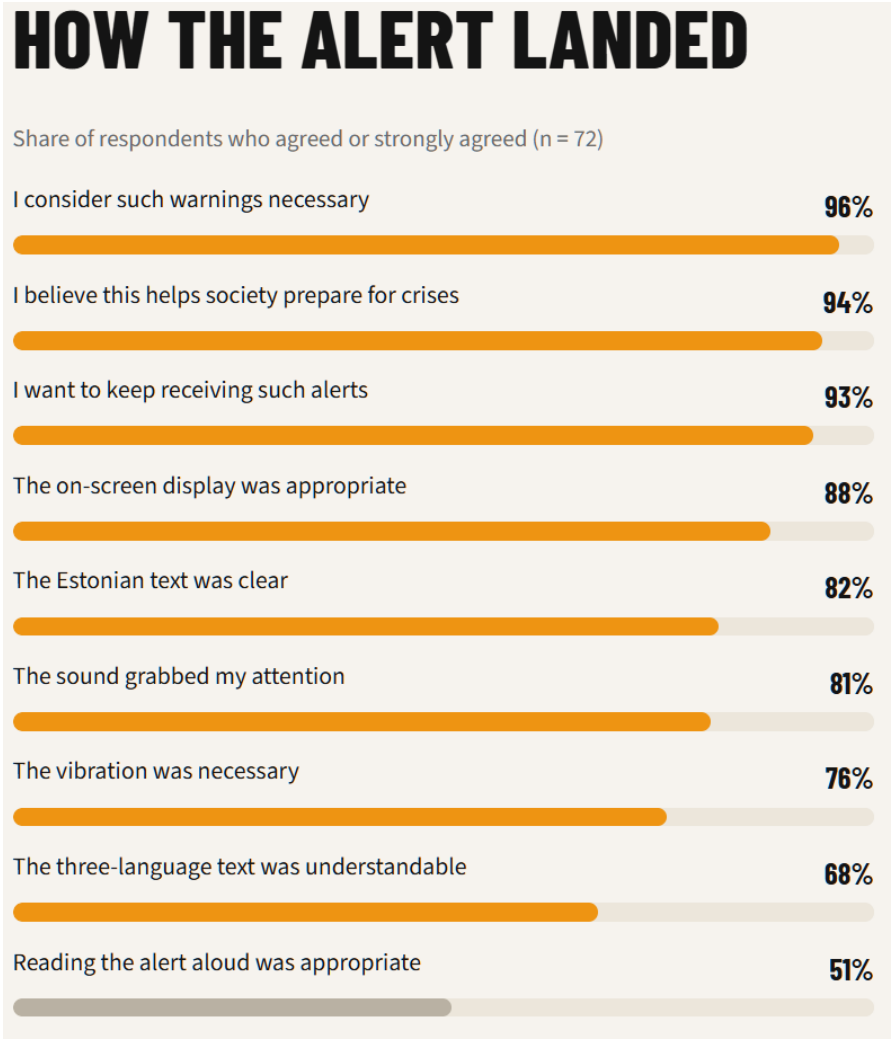


- A pilot project associating Estonia Ministry of Interior and Levira
- Experimental deployment on 5 sites
- A country like Estonia could be covered by 20 sites on existing Levira masts (45 000 square km)

Example: Public warnings via 5G Broadcast in Estonia



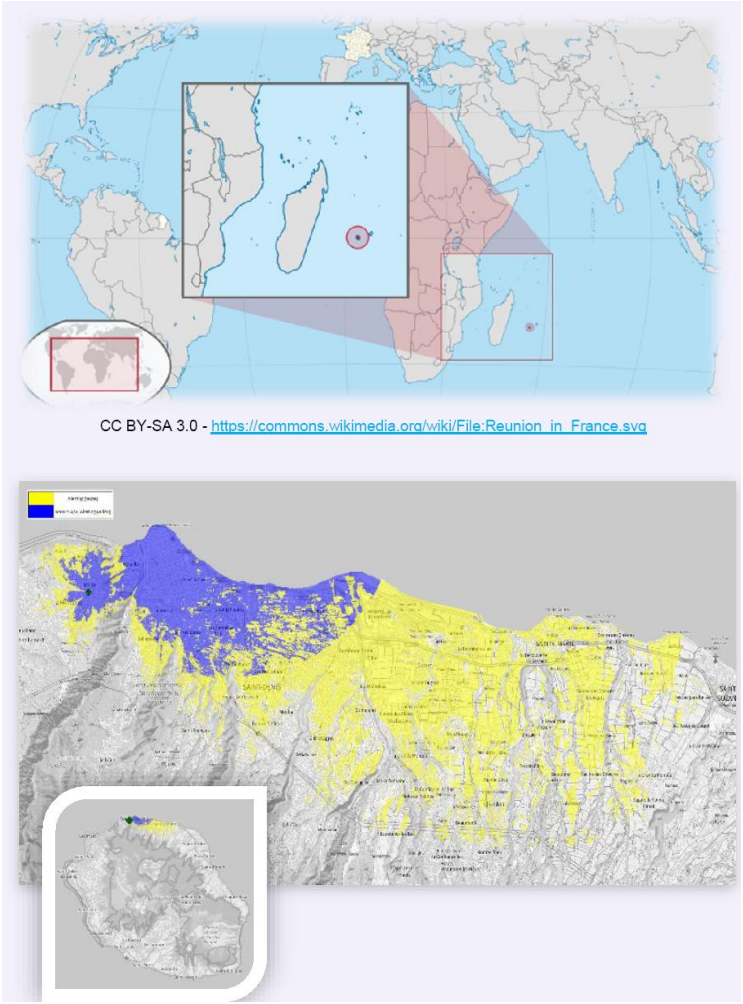
Child alert test March 2026. The alert is played only by devices within the danger area (source Levira)



Tester feedback- 16 July 2025 (source Levira)

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Example of both use cases: La Réunion experiment



(source TDF)

- Experimental deployment on 1 site to cover St-Denis, using a channel coordinated with Mauritius (October 2026-March 2027)
- Up to 2 linear services and one alerting component (basic text alert+ enriched audio/video alerting)
- User application to cover all use cases
- Projected coverage
  - Linear services, audio-video alerting: 44,700 inhabitants
  - Text alerting: 101,800 inhabitants

Introduction scenarios



Tried & tested

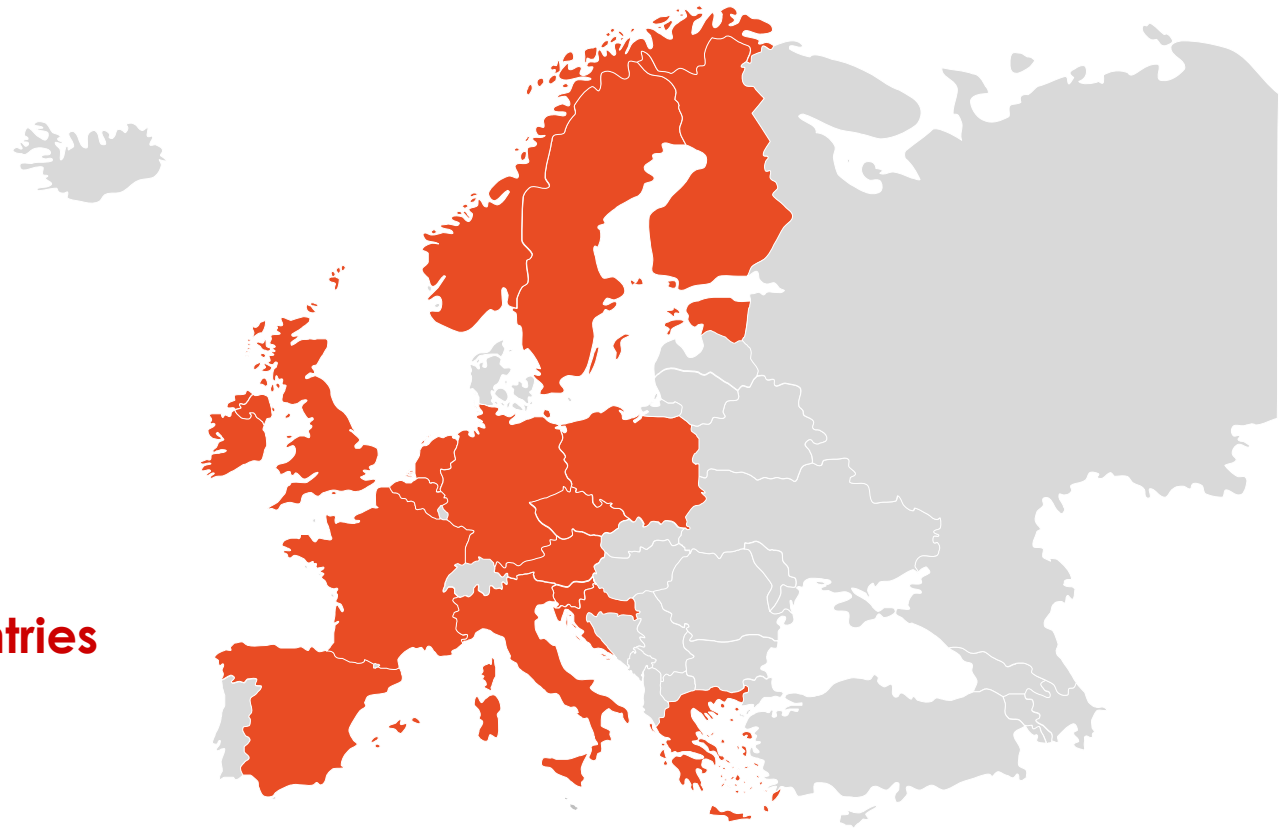
5G Broadcast **trials**

24 trials

18 countries

Involving

67 companies from **20** countries

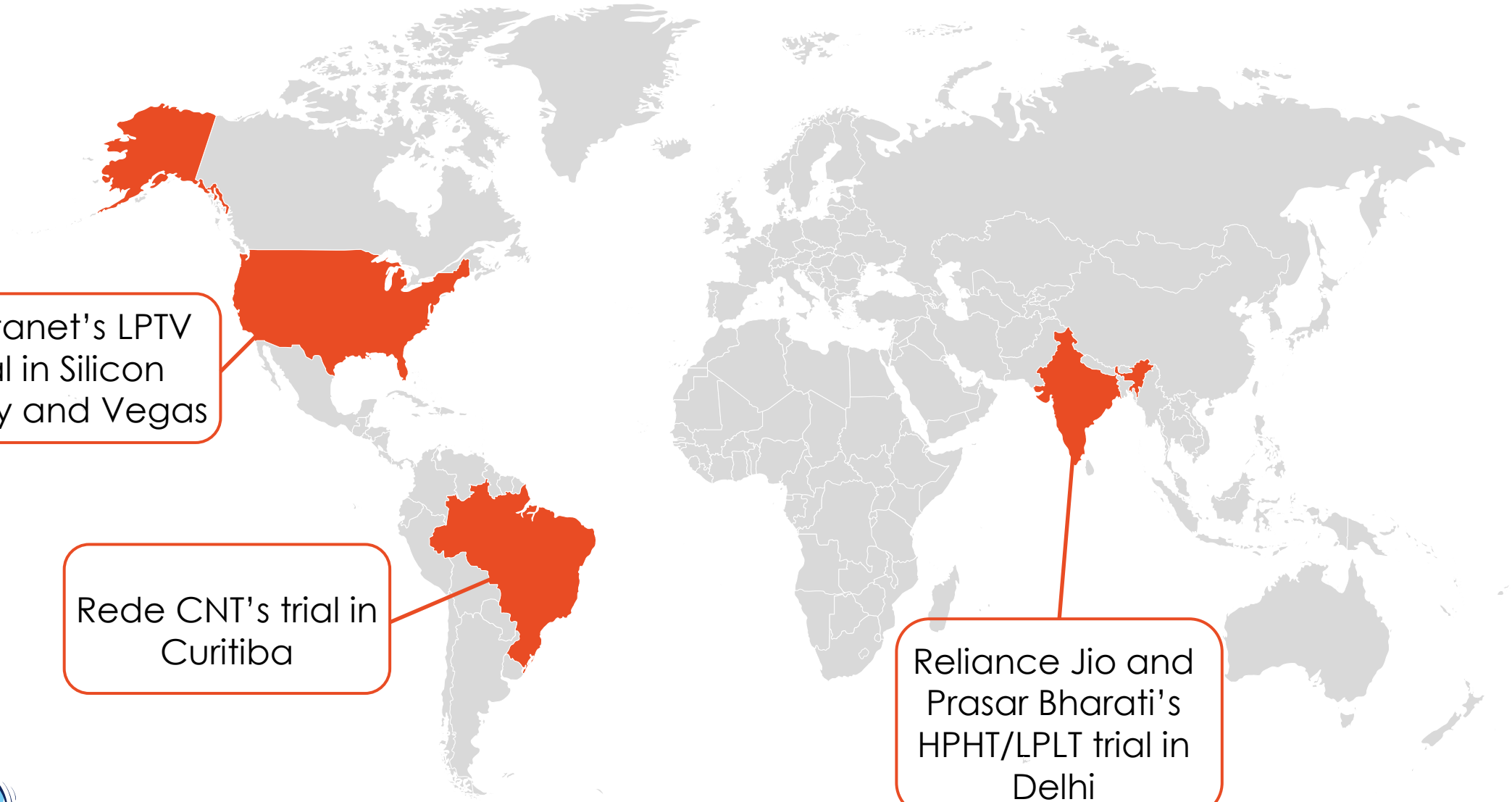


Multiple trials across Europe have demonstrated that the technology is mature and ready for deployment

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Interest spanning beyond Europe



Castanet's LPTV trial in Silicon Valley and Vegas

Rede CNT's trial in Curitiba

Reliance Jio and Prasar Bharati's HPHT/LPLT trial in Delhi

Industrial actors joining forces in Europe



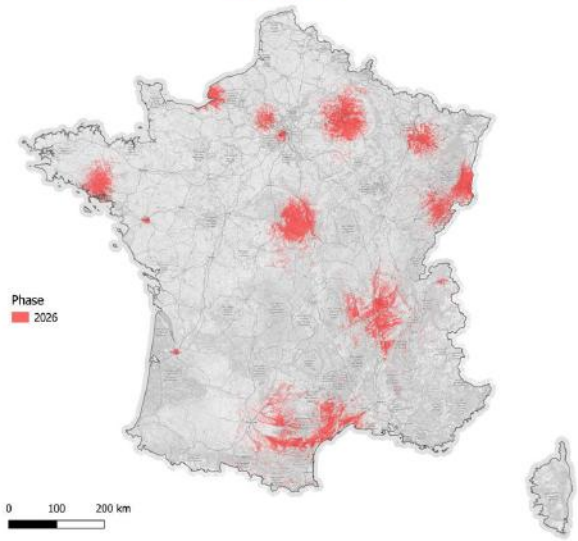
Belgium	Belgian Tower Company
Croatia	OIV
Czech Republic	CRA
Estonia	levira
Finland	DIGITA
France	tdf
Germany	Media Broadcast
Italy	Rai
Netherlands	broadcast partners
Poland	emitel
Spain	cellnex
Sweden	teracom

Example : Full scale deployment pilot in France

Initial Deployments starting in 2026

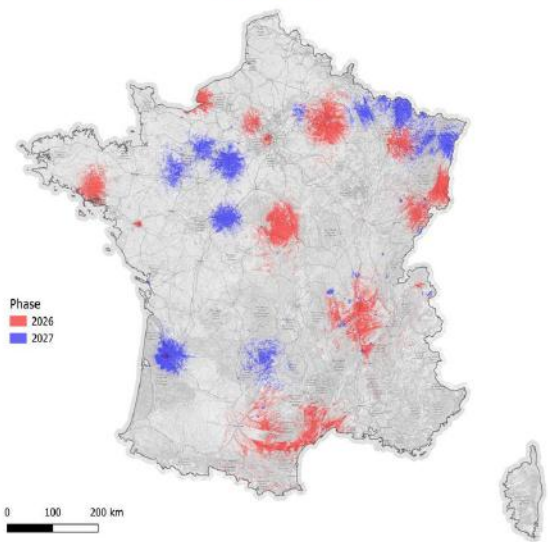
Projects & target roadmap in France

2026



Olympic Games Sites
+ 13 sites = 8,2 M Inabitants

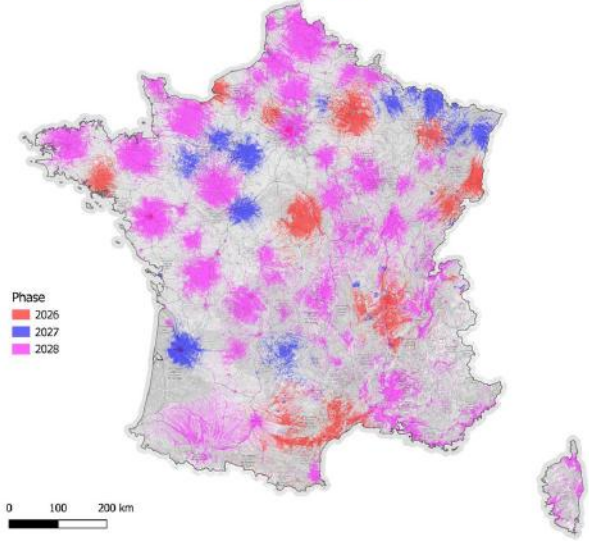
2027



+ 87 sites

+ 4,1 M inhabitants
= 12,3 M inhabitants

2028



+ 329 sites

+ 28 M inhabitants
= 40,3 M inhabitants

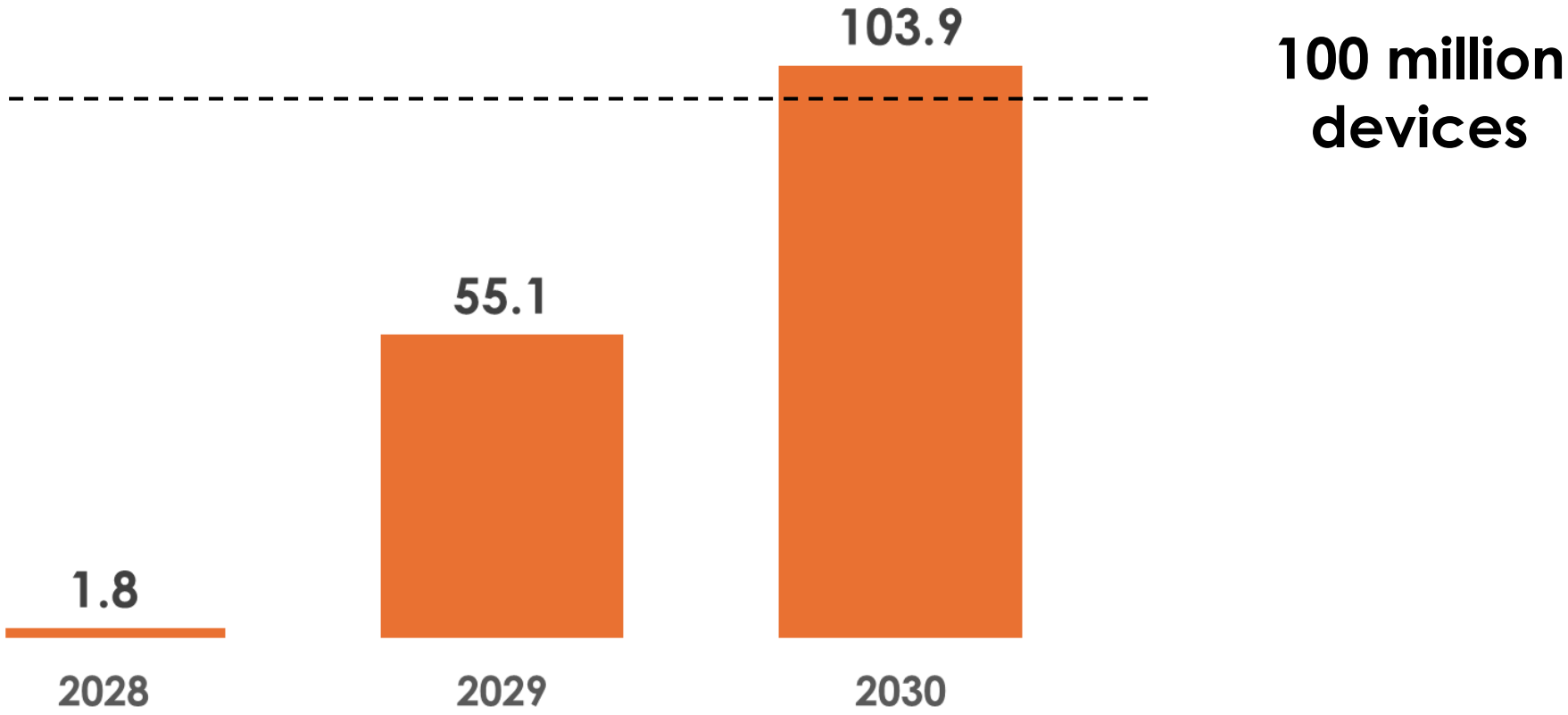
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The road to 100 million devices

CONTEXT



BASELINE SCENARIO



100 million devices

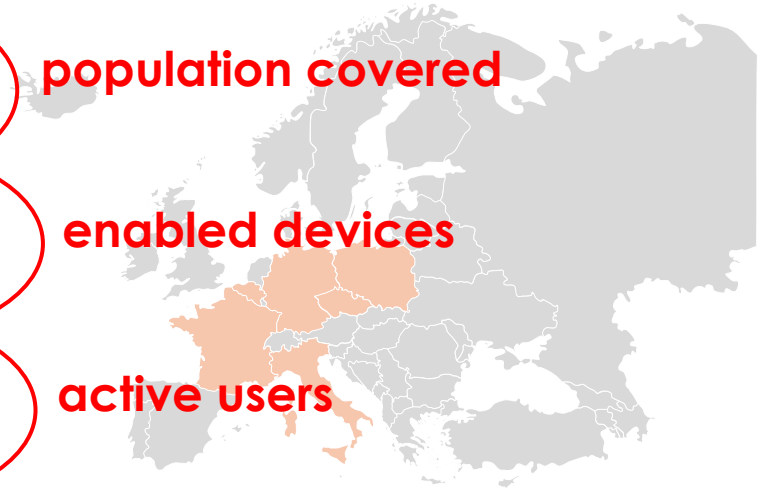
5G Broadcast Horizons – a credible introduction scenario

2027

27 M population covered

0 enabled devices

0 active users

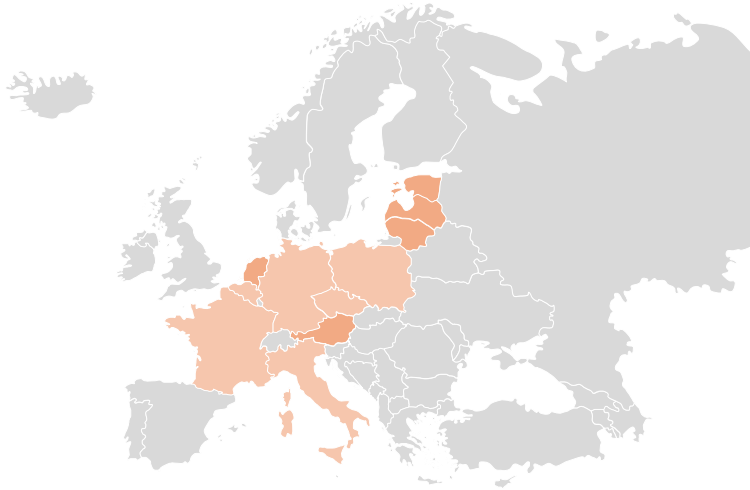


2028

139 M

2 M

0 M

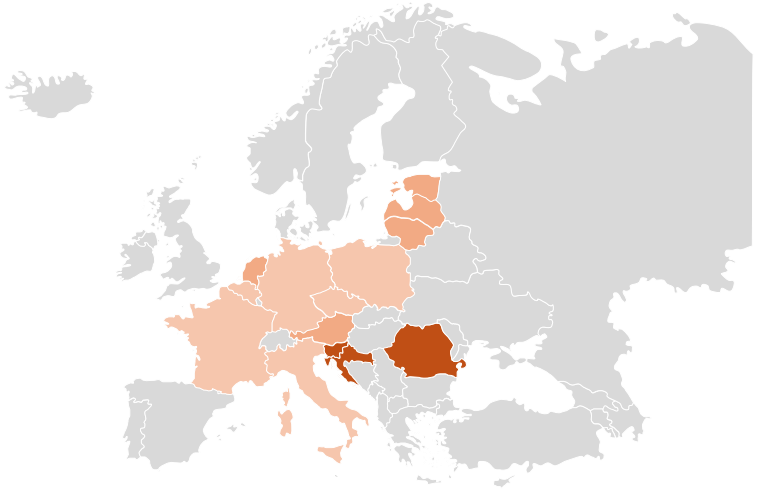


2029

211 M

55 M

3 M

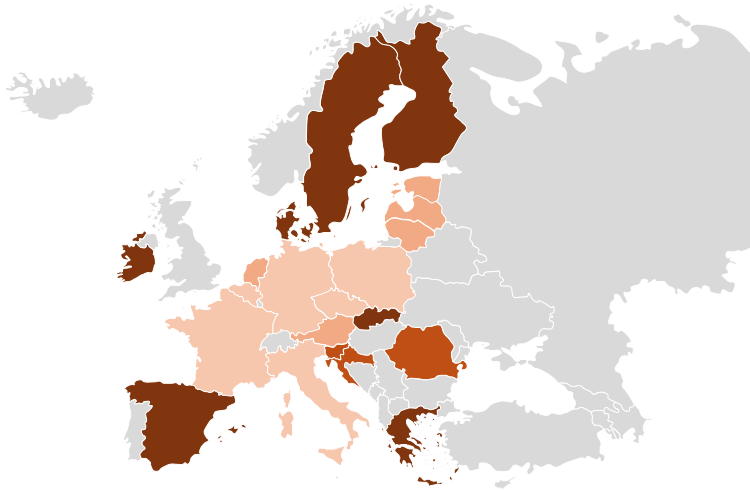


2030

276 M

104 M

12 M

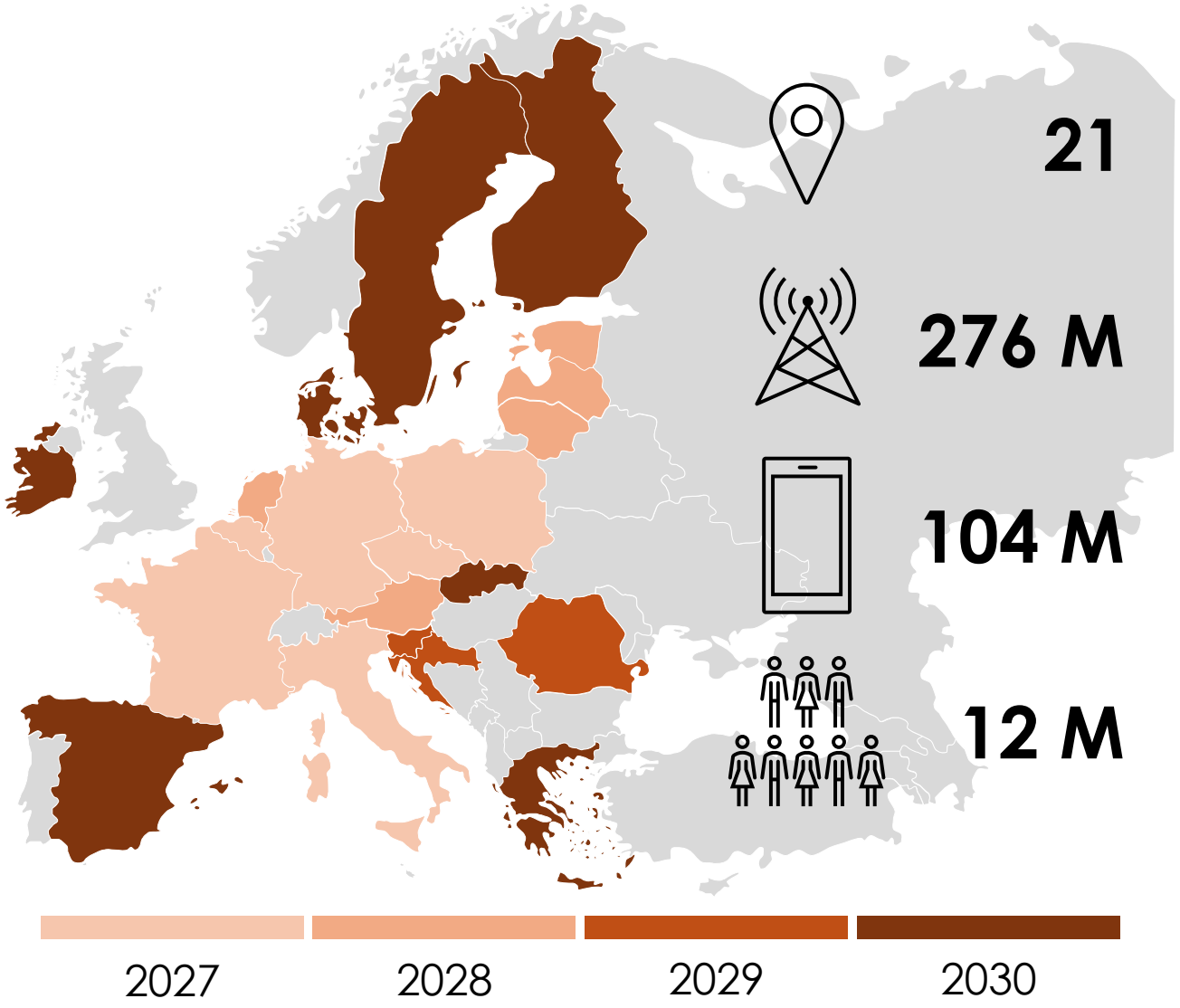


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Go to market deployment for 5G Broadcast

- Full spec approved as part of the 3GPP Release 19
- **Integration into DVB T2 and ATSC 3.0**
- Large scale **network deployment plans announced for 2026-2028**
- A pillar to distribute local content and support resilience **reaching all citizens, including younger audiences**
- Cooperation with chipmakers and OEMs
- Targeting first devices in the market **from H1 2028**



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Two foundational requirements

1

Ensuring all new mobile phones include **5G Broadcast enabled chipsets** in Europe from 2029.

2

Guaranteeing long term access to the UHF band for terrestrial broadcasting, noting the **key value of the 600 MHz band for 5G Broadcast** for inclusion in smartphones.

Conclusions



- For the first time, local content and public warning can reach citizens, with a regulated and resilient channel directly into their smartphones, without gatekeepers.
- The window of opportunity to turn 5G Broadcast into a success story in the digital world is now.

The window of opportunity is now



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