

Digital Terrestrial Television (DTT) is a Great European Success Story



The spectrum issue



Transition and development

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Represents Terrestrial Network
Operators in 22 countries



DTT is a Great European Success Story

- DTT networks now serves some 2000 TV channels, close to 50% of European households, 250 million viewers, each spending some 4 hours watching linear TV every day. In addition, secondary TVs rely on DTT.
- DTT is now launched in nearly all EU member states.
- European consumers have embraced DTT and are investing in new receiving equipment.
- The European DVB-T(x) standards are the most widely accepted and more than 1 billion TV receivers with integrated DVB-T tuners are now in use around the world (Europe, Russia, India, Thailand, Australia, African Countries)
- Low cost for media delivery. Network cost is typically between € 0.2-1,5 per household per month for up to 60 channels distributed 24/7. Per channel distribution cost can be as low as € 1c per household per month.
- Very easy access for consumers and no cost at point of consumption for a wide offering of free-to-air content. Additionally, premium subscriptions have been introduced in several member states.
- DTT is a key pillar for European content creation, pluralism, and cultural diversity.

DTT and the Importance of Spectrum

- DTT depends on UHF spectrum for provision.
- Consumers and the Broadcasting Industry have made substantial efforts and investments in the Digital Switchover and in making the 800 MHz band available for other services than TV.
- Currently available spectrum for DTT is fully utilized in many countries.
- Migration to more efficient technologies for DTT is underway to meet demand for additional and higher higher bandwidth services, e.g. HD and UHD TV.
- The 700 MHz band represents 30% of available spectrum for DTT. Any changed use would imply severe constraints for service delivery, innovation and technology migration. Any changed use would require a long time to re-plan current usage and demand very significant investments for Consumers and the Broadcast Industry.
- DTT has a key role to play at least until 2030 (OFCOM).
- The discussion on co-primary allocation to the mobile service in the lower UHF band and the long term use of the whole UHF band is a threat and may lead to a regulatory induced failure of DTT. This is not in the interest of the European Consumer.

DTT

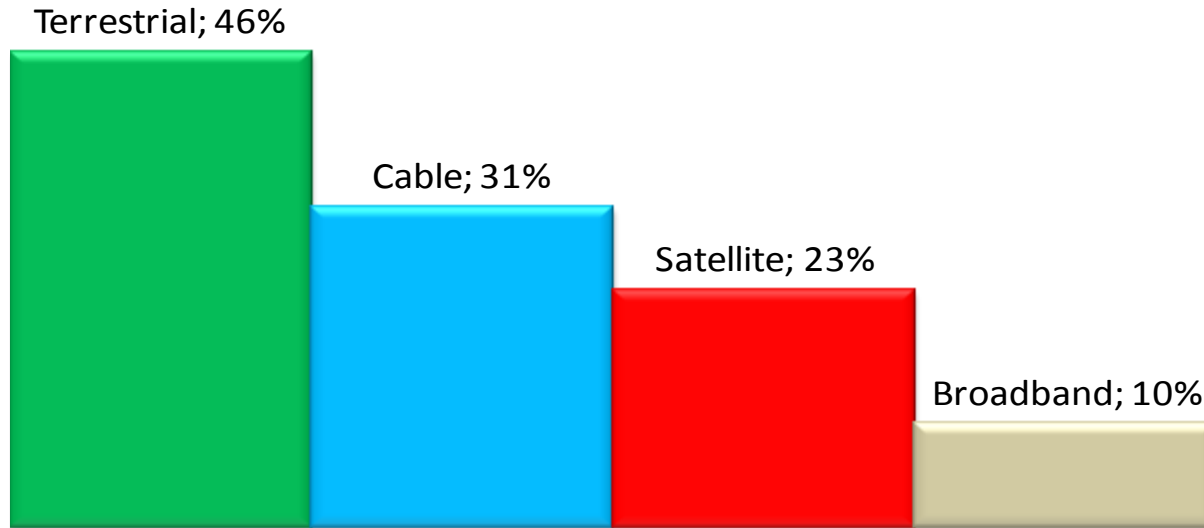
Key characteristics

- Largest distribution platform with universal access and universal coverage
- Resilient and cost efficient
- Free to Air at point of consumption

Key issues

- Diversity of member states must be recognized before any European decision on the 700 MHz band.
- Impact and disruption of service to consumers must be minimized if DTT would be transitioned out of the 700 MHz band.
- Certainty of long term access to DTT spectrum below 700 MHz
- A common EU position against co-primary allocation to the mobile service below 694 MHz.

TV Reception, EU28 Households

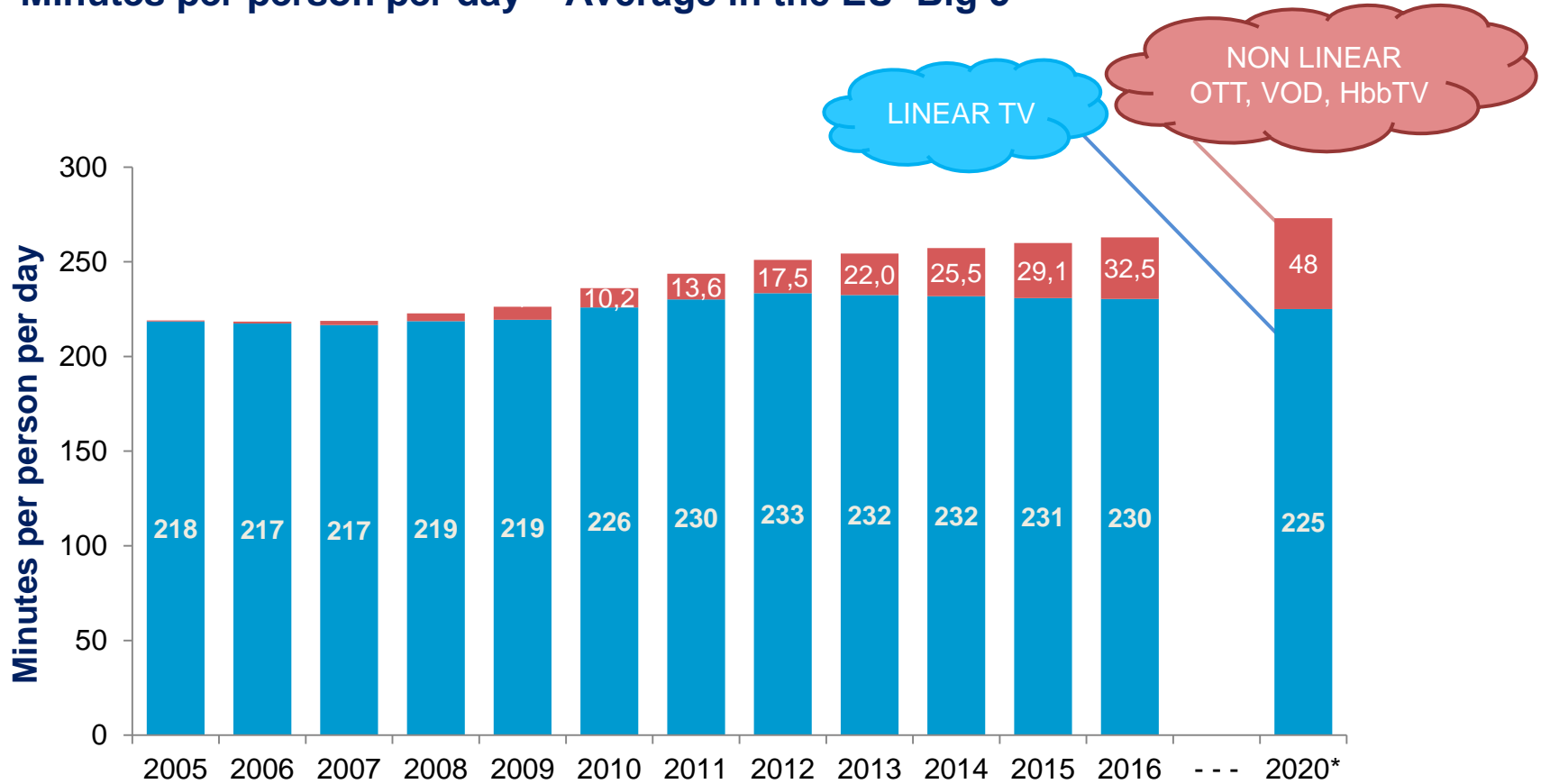


“Terrestrials” - approx:
>100 million households
>250 million people
45-50% of Europeans
2000 TV Channels

*Data from Eurobarometer 396, 2013 and Mavise. Adds to more than 100%.
Households may use more than one platform.*

Evolution of linear and non-linear TV viewing

Minutes per person per day – Average in the EU 'Big 5'

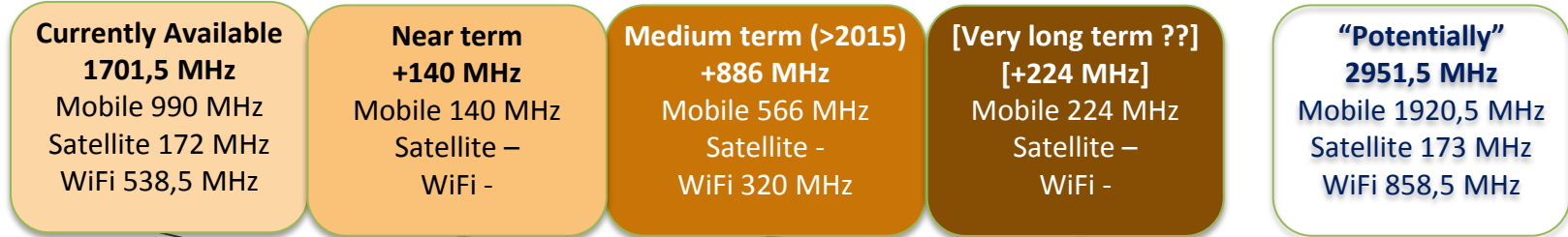


Source: IHS – ScreenDigest: Cross-platform Television Viewing Time FY 2012

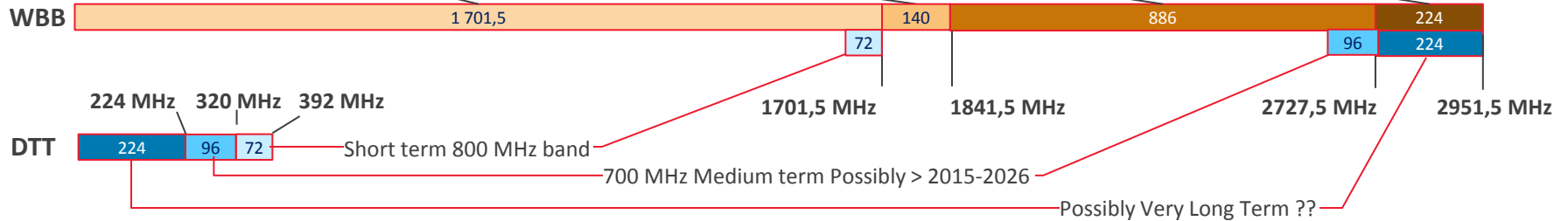
Note: Forecast from 2012 / * 2020 forecast by EBU

Wireless Broadband and DTT Spectrum, RSPG Opinion

Wireless Broadband (WBB)

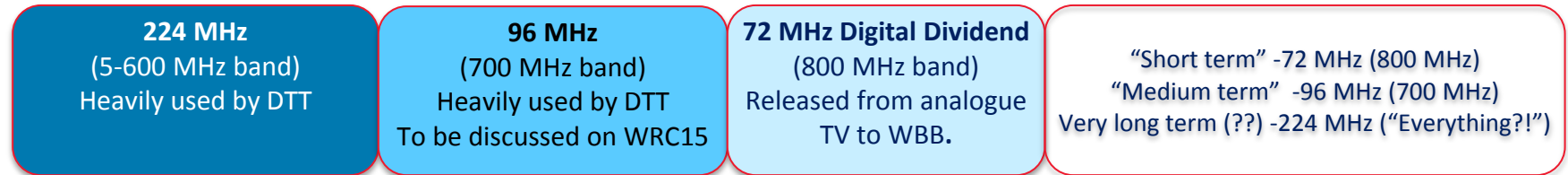


Source: RSPG Opinion, June 2013



Digital Terrestrial Television (DTT)

Amount of Spectrum in MHz



Data traffic comparison

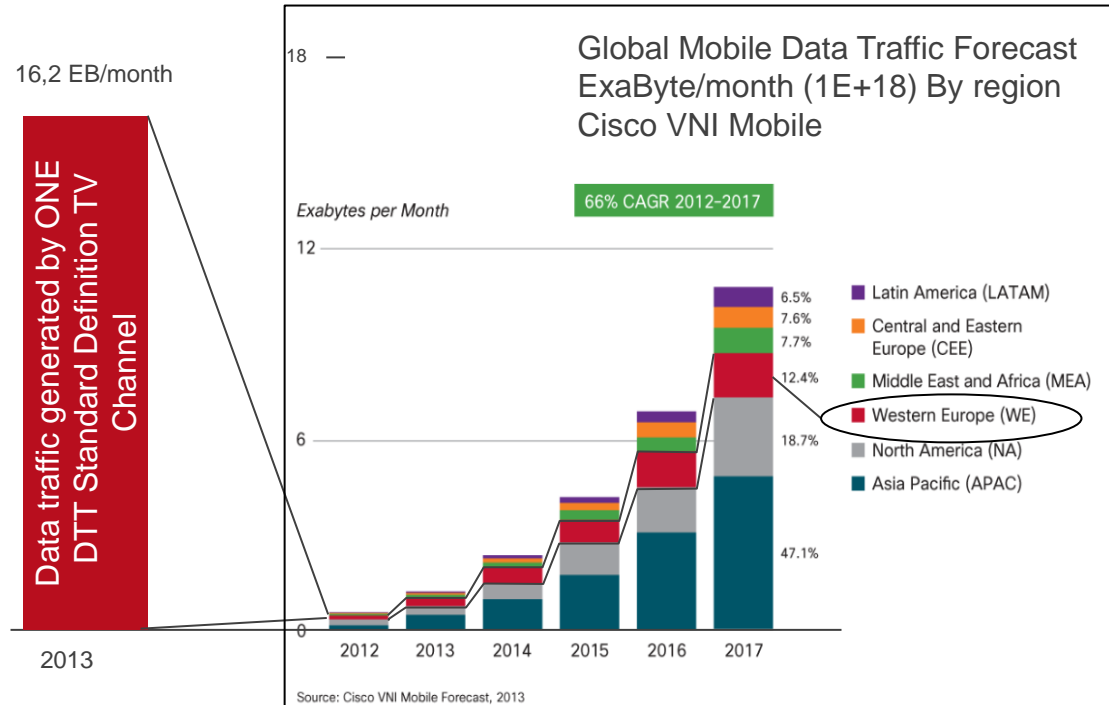
DTT networks vs. Cisco Mobile Traffic Forecast

Data Traffic Consumed 2013 from DTT Networks for ONE standard Definition Television channel across EU28.

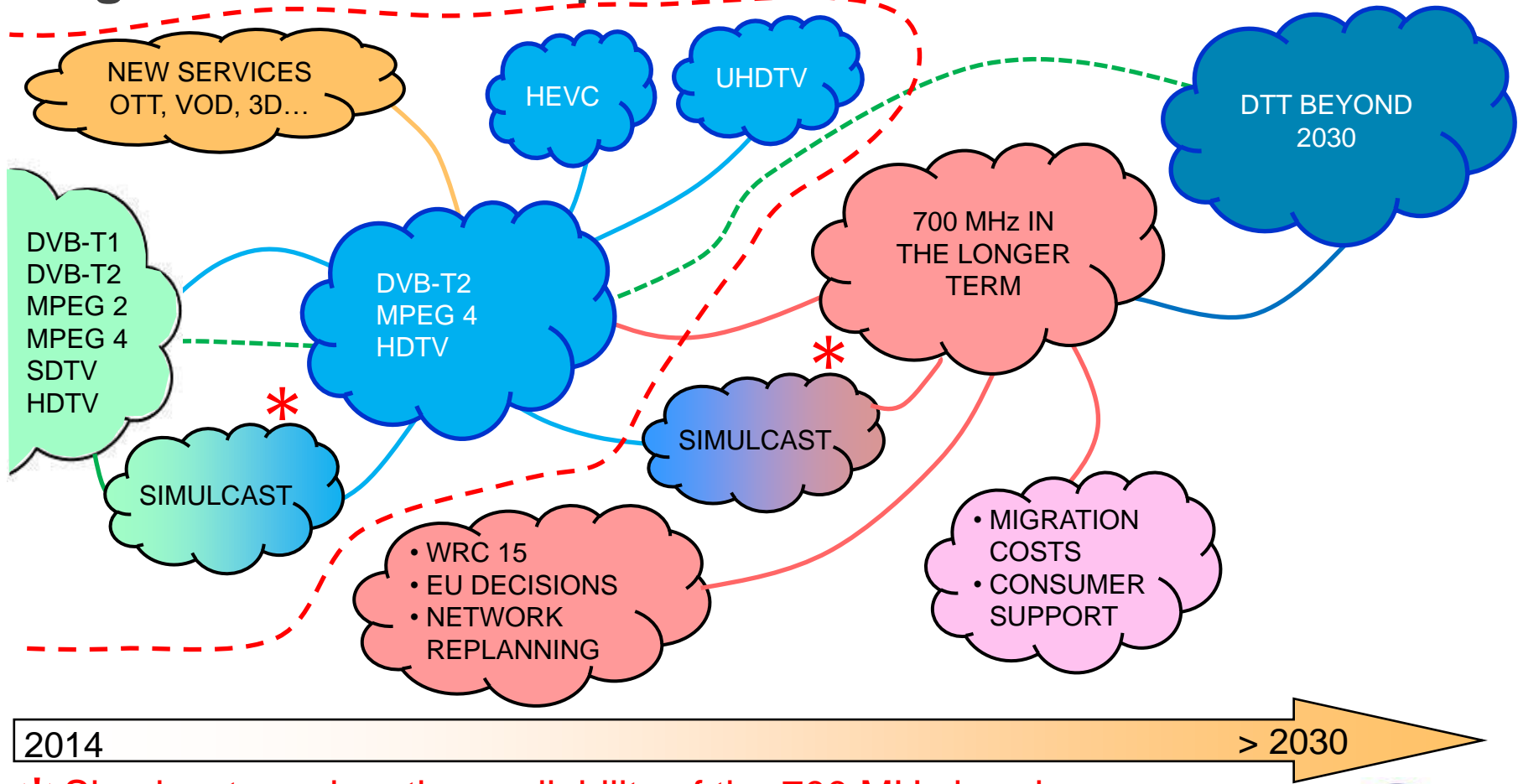
100 million households
4 hours per day.
(A conservative estimate)

Note that most of Mobile Data Growth will occur in North America and Asia Pacific according to the Cisco forecast

Then we should note that the data growth forecast might be overestimated by a factor of 1000 as we have seen in the conference handout from Policy Tracker (OFCOM).



Migration and Development



* Simulcast requires the availability of the 700 MHz band



DTT is a Spectacular European Success Story

It will continue to develop

250 million consumers – 2000 TV channels

The largest distribution platform in Europe

A sustainable DTT future = Certainty of Spectrum Access