

# BNE LONG TERM VISION

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## Terrestrial broadcasting networks, an essential European infrastructure

- ▶ Television and Radio are essential parts of Europeans' lives. They reach 80% of European citizens weekly. On average every day, each European citizen watches TV for 3h16min and listens to radio for 2h13min<sup>1</sup>.
- ▶ Terrestrial broadcasting plays a unique role in Europe among the competing TV and radio distribution platforms: Digital Terrestrial TV (DTT) is used by over 100 million households which corresponds to more than 42% of European households. FM and DAB+ radio networks reach 4 to 5 receivers per household, supporting 60 to 80% of the radio listening hours<sup>2</sup>. Terrestrial broadcasting networks provide universal national coverage.
- ▶ Terrestrial broadcast network operators are responsible for managing, operating and maintaining the critical and reliable national infrastructure that brings TV and radio to homes and vehicles.
- ▶ Broadcast Networks Europe (BNE) represents 17 of them, present in 19 countries, contributing to Europe's digital transformation through reliable, secure, and sustainable media delivery infrastructure.

## Our vision for Europe - Securing Europe's digital sovereignty

As the EU embarks on its new mandate, the upcoming initiatives in digital, audiovisual, electronic communications and spectrum policy must remain supportive of a strong terrestrial broadcasting sector. **European sovereignty and cultural industry are at stake**, together with **their associated benefits for citizens and the society**.

### BNE calls on policymakers to:

- ▶ Develop an **ambitious European policy for broadcasting innovation**, focused on 5G Broadcast implementation, including receiver requirements, and on interactive (HbbTV) and UHD technologies.
- ▶ Confirm terrestrial broadcasting's **long-term spectrum access**, through 2040 and beyond, to the UHF band, which is a vital resource for European public service and content delivery in an energy efficient way.

These policy requirements are fundamental to strengthen terrestrial broadcasting's essential contribution to EU priorities, including media freedom, pluralism and independence, freedom of expression, cultural diversity, fight against

disinformation, children protection, digital sovereignty, security on communications, and environmental sustainability, as detailed in the following sections.

## BNE value proposition

### Accessibility

- ▶ Terrestrial Broadcasting networks guarantee that all citizens – regardless of their location, income, or digital literacy – have access to quality information, public service, culture, and entertainment.
- ▶ Terrestrial broadcasting follows a free-to-air model, with a nationally, regionally and locally curated mix of contents, making it very attractive for listeners and viewers.

### Sustainability

- ▶ Contrary to the ever-increasing carbon footprint of the internet, Terrestrial Broadcasting helps lower the overall energy consumption and reduces the carbon footprint of media delivery across Europe. Its energy efficiency comes from a one-to-many transmission model, where in a large area a single signal serves all viewers via passive antennas and simple and long-lasting receivers. Reception quality remains stable regardless the number of users.
- ▶ Studies by regulators and by industry<sup>3</sup> confirm that terrestrial broadcasting (DTT, FM, DAB+) delivers a large share of audiovisual content with significantly lower energy consumption and carbon footprint than other methods. Terrestrial broadcasting is irreplaceable for the sustainability of audiovisual media delivery.

### Sovereignty, reliability and resilience

- ▶ As a critical infrastructure, organised in nationwide networks and operated under national licenses (some of them already guaranteed until 2040) without gatekeepers, terrestrial broadcasting is an asset that strengthens national and European sovereignty.
- ▶ Terrestrial infrastructure provides high reliability and quality for the broadcasters regardless of network load or weather conditions, without bottlenecks or buffering. It is highly protected and redundant including against cyber-attacks, guaranteeing service continuity at a level that cannot be matched by other distribution means.
- ▶ In any emergency, terrestrial broadcasting provides a key resilient network with universal coverage to warn and reach out to citizens and support the work of emergency and rescue services.

## Innovation

- ▶ While terrestrial broadcasting is present in all countries in the world, Europe has a leading edge especially in the DVB transmission and system technologies, in HbbTV for hybrid interactive technologies and in defining the new broadcasting standard 5G-Broadcast.
- ▶ BNE members' infrastructure enables continuous advancement in broadcasting technology by using the most advanced compression and distribution technologies to support enhanced viewing experiences.
- ▶ The next generation of terrestrial broadcasting '5G Broadcast' will further improve the reliable reception of broadcast content. Everyone has a smartphone in their pocket, which, when integrated with 5G Broadcast functionality, enables access to information even when the internet is disrupted or the mobile phone cell is overloaded.
- ▶ Additionally, new applications are being developed for emergency warnings (e.g. ASA, Automatic Safety Alert on DAB+), connected cars, and public information.
- ▶ The innovation [roadmap](#) to 2040, developed by BNE in 2023, demonstrates the sector's dynamic evolution:
  - ✓ Evolving from HD to Ultra-HD with enhanced audio, already demonstrated in major sports events across Europe and in pioneer service in France and Spain.
  - ✓ Leading integration of broadcast and internet through HbbTV, with over 90% adoption in new TV sets.
  - ✓ Pioneering 5G Broadcast to reach mobile devices and car/train entertainment systems while maintaining free-to-air access.

Innovation in broadcasting will not happen at the expense of other services, rather the opposite: the innovation roadmap maintains the track record of terrestrial broadcast services in spectrum sharing with other key services such as PMSE for media and cultural production, radio astronomy and the military.

## Backbone for European values, democracy and content industry

- ▶ Regulated through spectrum licences, radio and TV broadcasters uphold strict editorial independence and responsibility, ensuring accountability in media delivery against disinformation and fake news alongside providing protection against artificially generated content. As a result, Radio and TV are the most trusted media, safeguarding freedom of speech, and actively countering hate speech, contributing to the required public debate to keep democracy healthy.
- ▶ While internet platforms are dominated by non-European actors, terrestrial broadcasting offers a selection of contents that gives reach and prominence to public service media, regional and local content, and national and European production.
- ▶ With more than 750 national and 1,549 regional TV channels on DTT and 12,000 radio stations "on air", terrestrial broadcasting is the economic backbone of a strong and competitive European content industry that fosters many qualified and local jobs.

## Terrestrial broadcasting's contribution to the European economy: some numbers<sup>4</sup>

- ▶ Terrestrial broadcasting as the reference platform for public service media and free to air commercial channels remains the backbone of the European Audiovisual model.
- ▶ **9 of the top 10** European-owned players are active on DTT (14 of top 20 and 34 of top 50).
- ▶ European Broadcasters finance **16 billion euros per year** in European original audiovisual content, which represents 74% of the investment, against 26% for streaming platforms.
- ▶ In addition, they invest **27 billion euros in acquired films and TV rights, sports** and other content.
- ▶ In Europe, the TV and radio sectors **employ more than 370 000 people**, with major fallout on video, music and film production (700,000 jobs) and direct synergies with live performance sector (1,400,00 jobs).

## BNE asks for long term future

### Ask #1 - Develop an ambitious European policy for broadcasting innovation

- ▶ Implementation of BNE's innovation roadmap requires support from public authorities at European and national level. Important provisions in the Radio Spectrum Policy Program, in the UHF Decision and in the EECC have allowed the terrestrial broadcasting sector to manage the modernization of the platform with continued relevance for the viewers and listeners.
- ▶ In the same vein, upcoming initiatives must create the conditions for an effective roll out of 5G Broadcast, including receiver implementation requirements, and facilitate wide adoption of interactive hybrid standards (HbbTV) and UHD technologies in the European single market.

### Ask #2- Confirm long-term spectrum access to the UHF band for terrestrial broadcasting, through 2040 and beyond

- ▶ Through optimal frequency planning and use of the latest coding and transmission technologies, high quality content tailored to each national market are distributed on the DTT platform using limited spectrum, while ensuring equitable access to the spectrum among neighbouring countries.
- ▶ This spectrum allocation, recently affirmed by the WRC23 [agreement](#), is shared by broadcasting and several other services such as creative sector applications, including wireless microphones and equipment for content creation, programme making, and production of live events.
- ▶ Maintaining the priority given to broadcasting services in the 470-694 MHz band for the foreseeable future is essential for the European sector and its investments.


## Larger remit but shared views: the Wider Spectrum Group

- ▶ BNE belongs to the "Wider Spectrum Group", which gathers 10 European and 8 national associations representing public and private broadcasters, trade unions in the media, live performance and journalism sectors, the film, audiovisual and event content production, and viewers, listeners and consumer organisations.
- ▶ Members of the Wider Spectrum Group share a common view on the need to ensure that European and national policies regarding frequency allocation preserve the potential for European growth, innovation and sustainable employment.

#### REFERENCES

1. Based on EBU'S annual TV audience report and radio audience report (2024).
2. DTT penetration from BNE-EBU DPM data base 2024 edition. Radio data from AER website and World DAB 2025 infographic.
3. LOCAT study (2021), OFCOM studies (2022 and 2024) and ARCOM/ARCEP/ADEME (2024)
4. Economic data from EAO AV services spending report (2024) and Top players in the European AV industry report and tables (2025). Employment data from Eurostat - for EU and EFTA and House of Lords library for UK. Aggregation and additional research from Wider Spectrum Group resources (2025)



A tall, lattice-structured radio tower stands against a dark blue sky. Concentric white circles emanate from the top of the tower, representing broadcast signals. The tower is positioned on the left side of the frame.

Broadcast Networks Europe (BNE) represents Europe's terrestrial network operators in Europe and internationally. Terrestrial broadcast network operators are responsible for managing, operating and maintaining the infrastructure that brings TV, radio and other wireless and over-the-air services to homes, cars, and other users.

As an organisation, BNE support an efficient and fair regulatory environment that give European citizens universal access to the TV and radio they watch and enjoy.

BNE's 17 members are operating in 19 European countries: Austria, Belgium, Croatia, Czech Republic, Estonia, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Poland, Romania, Serbia, Slovakia, Spain, UK and Sweden.

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