



broadcast
networks europe

5G BROADCAST: HORIZONS FOR EUROPE


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A credible path to market for 5G Broadcast

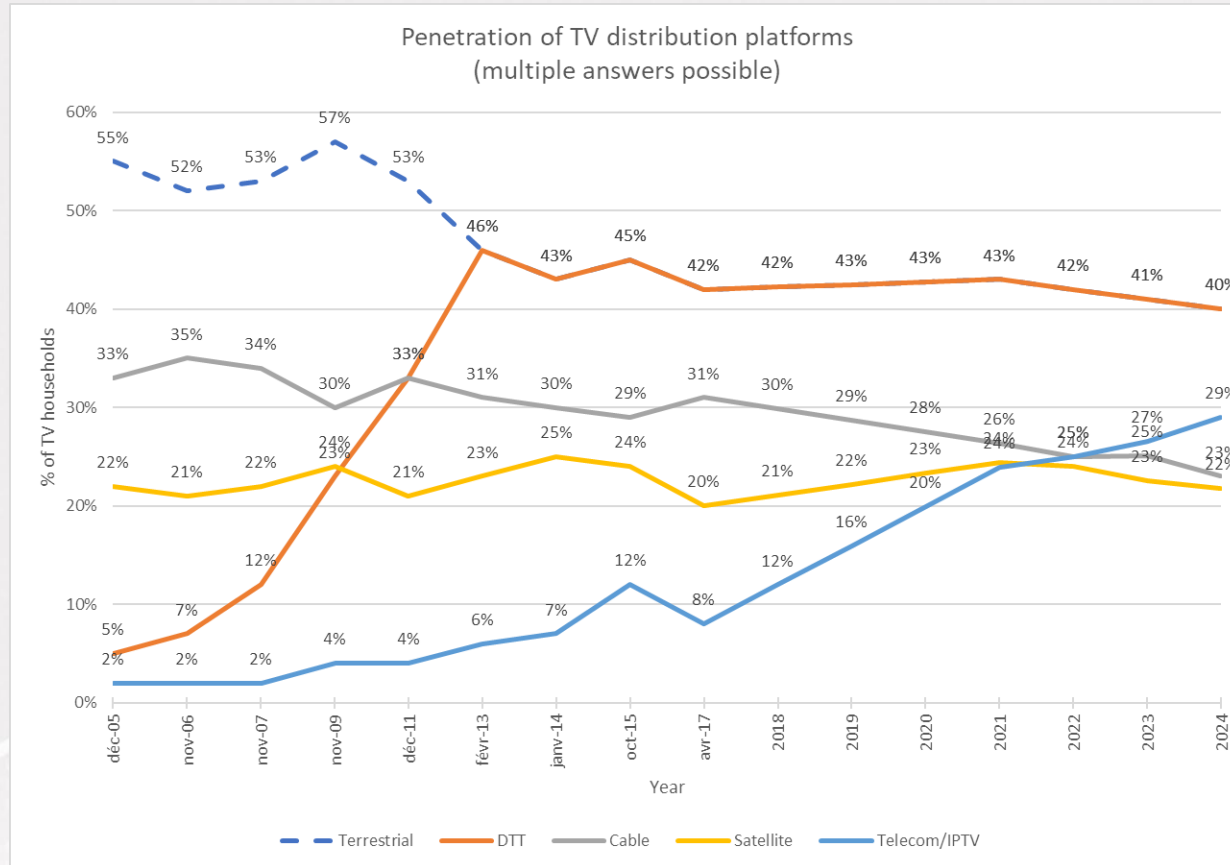


- Part of the 3GPP Release 19
- A strategic business and editorial value proposition for broadcasters
- Ambitious network deployment plans announced for 2026-2028
- Cooperation with chipmakers and OEMs progresses swiftly
- First devices in the market by H1 2028 as a goal

Terrestrial Network Operators serving 19 Countries

 <i>United Kingdom</i>	 Belgian Tower Company <i>Belgium</i>	 <i>Austria</i>	 <i>Spain, Belgium Netherlands</i>	 <i>Czech Republic</i>	 <i>Greece</i>
 <i>Finland</i>	 <i>Italy</i>	 <i>Italy</i>	 <i>Poland</i>	 <i>Serbia</i>	
 <i>Estonia</i>	 Media Broadcast <i>Germany</i>	 Digital signals and networks <i>Croatia</i>	 <i>Ireland</i>		
 <i>Romania</i>	 <i>France, Estonia</i>	 <i>Sweden</i>	 <i>Slovakia</i>		

Terrestrial Television is a very resilient platform



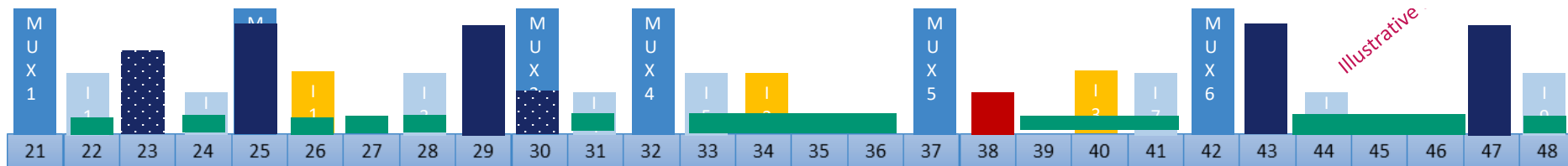
- DTT has had a very quick take up
- Strong presence among European households
- Strong competition from IP (even more if we include OTT distribution)

Sources: Eurobarometer; EBU-BNE DPM data base 2025

Innovation roadmap for more quality, hybrid interactivity and mobility

In a scarce UHF spectrum

Frequency focused



IP-DLO service
% of mux

5G Broadcast (5GBC)
Pre-commercial

“Ecosystem evolution”

5G BC
1- 4 mux

Radio Astronomy
8 MHz

PMSE Services
100-120 MHz

I 1 I 1
Overspilling Country B
and C muxes

Licensed Media
distribution
service
4-8 mux Country
A

5G Broadcast
“Commercial mobile”

All-IP DL for media, culture, creativity and audiovisual contents:
Continuous technological and service innovation

All-IP DL– new complementary services
Ancillary DL services to licensed media distributors (eg scheduled contents), and possibly new downlink only services (eg Emergency Warning Services) under EU flexibility or national schemes

IP-DLO
complementary
services

Non-public networks for
Media production

Content production

HbbTV / UHD
service level innovation

DVB-T2 / HEVC
efficiency and service improvement
enables all-IP broadcast

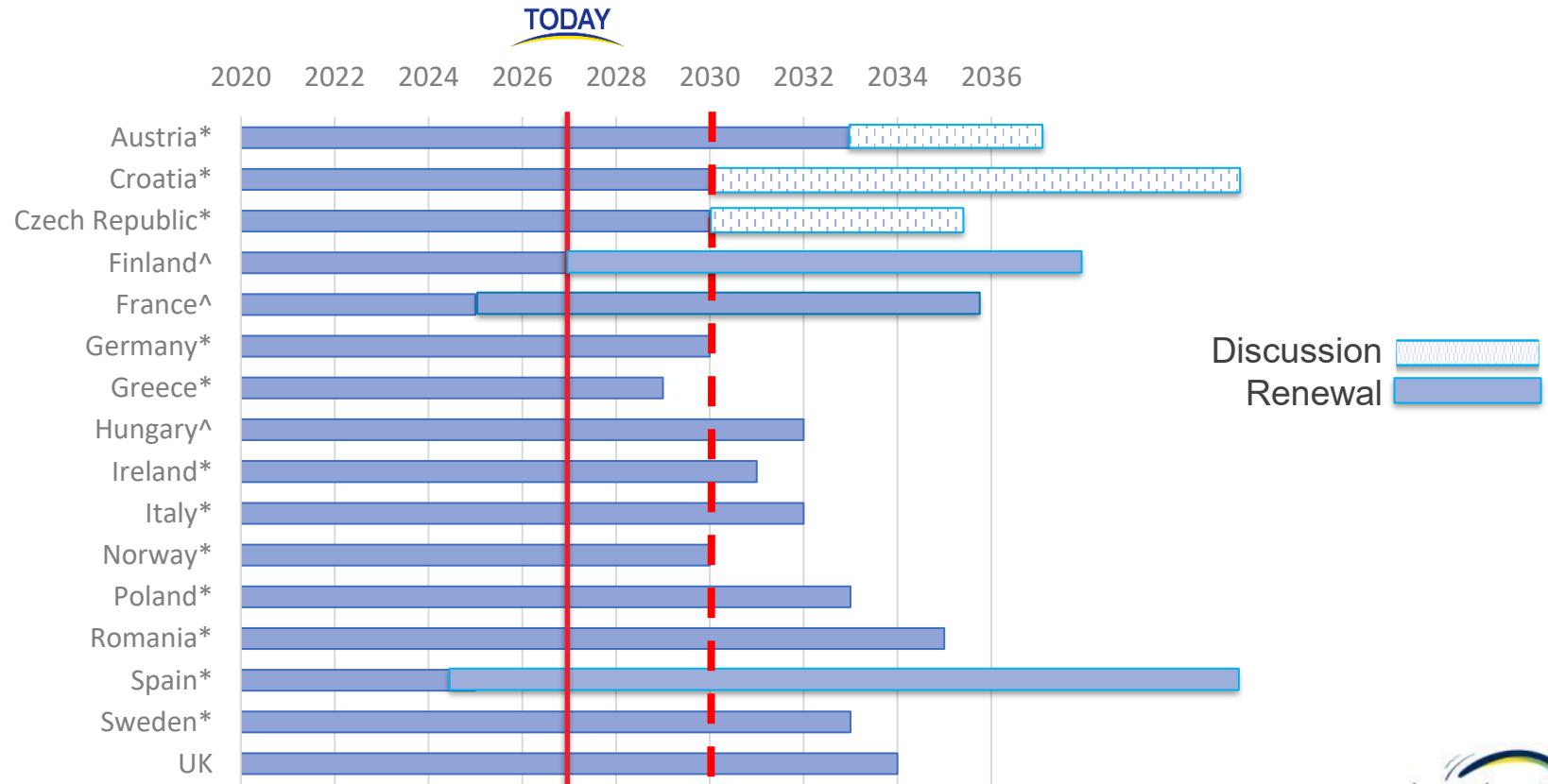
UHD2
More sustainability
More hybrid

media, culture, creativity and
audiovisual contents

Time
focused

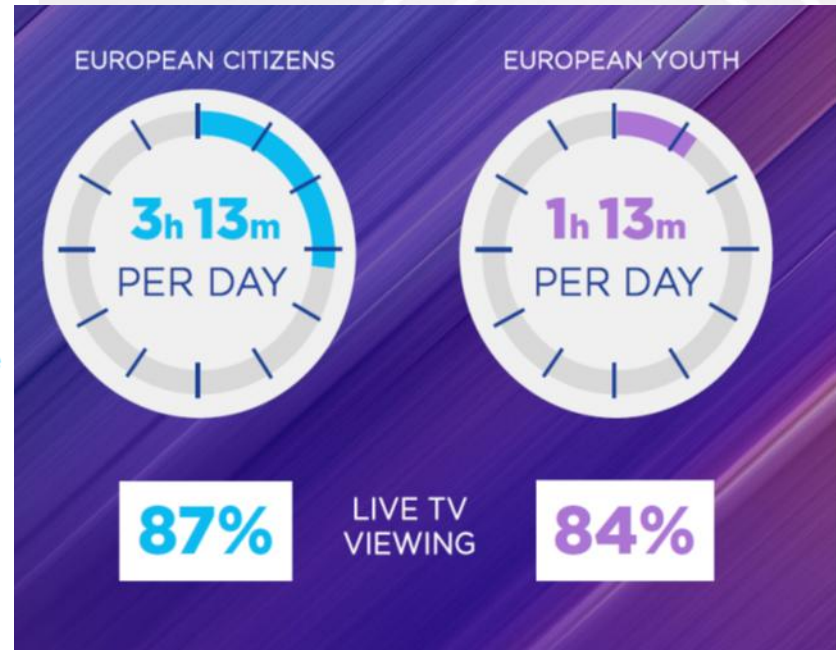
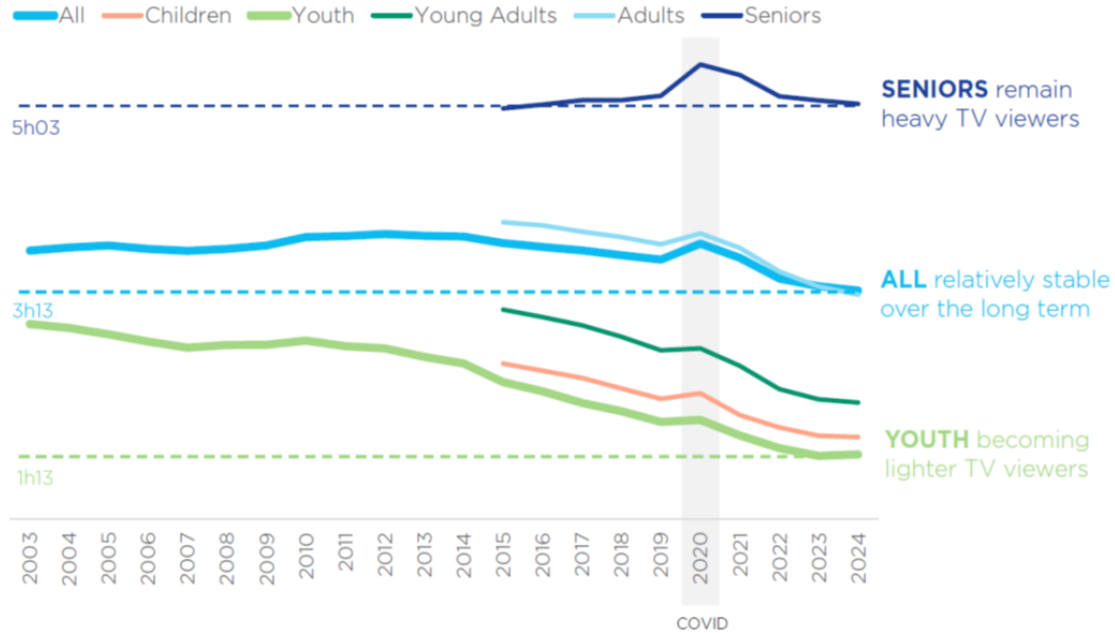


DTT licences generally extend beyond 2030, a limit well passed in all recent renewals



Usages are changing

EBU AREA DAILY AVERAGE TV VIEWING TIME EVOLUTION BY TARGET GROUP

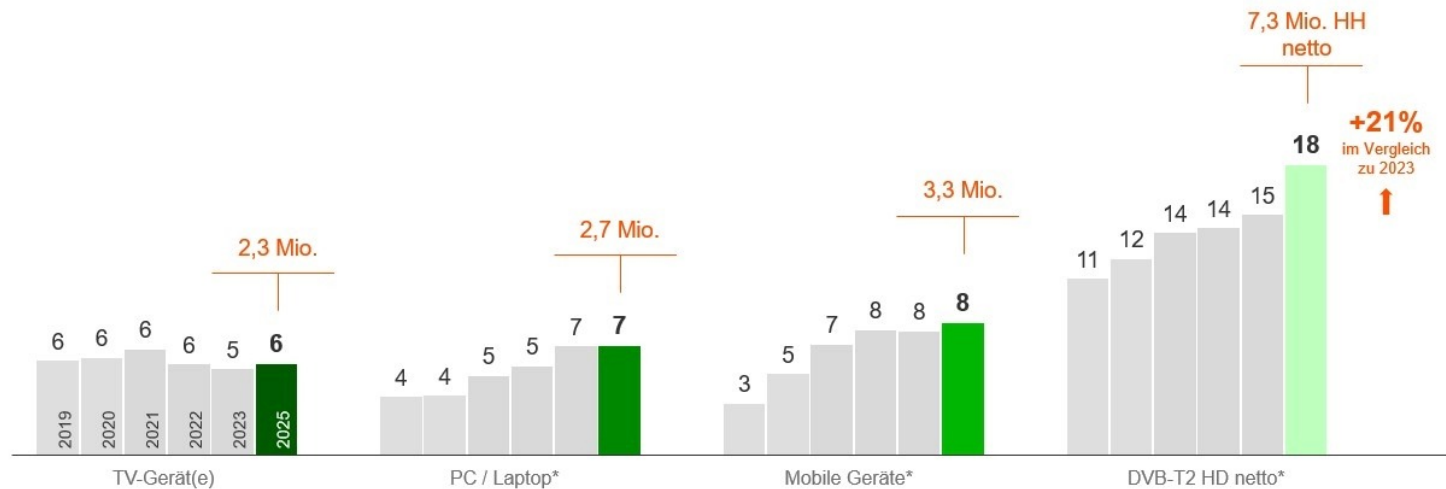


Sources: EBU

Not all changes are unfavorable to terrestrial TV. Moreover, they reveal the way to go

DVB-T2 HD – Übersicht Deutschland gesamt im Trend (1)

Der Empfang von DVB-T2 HD gesamt steigt auf 18 Prozent an.



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

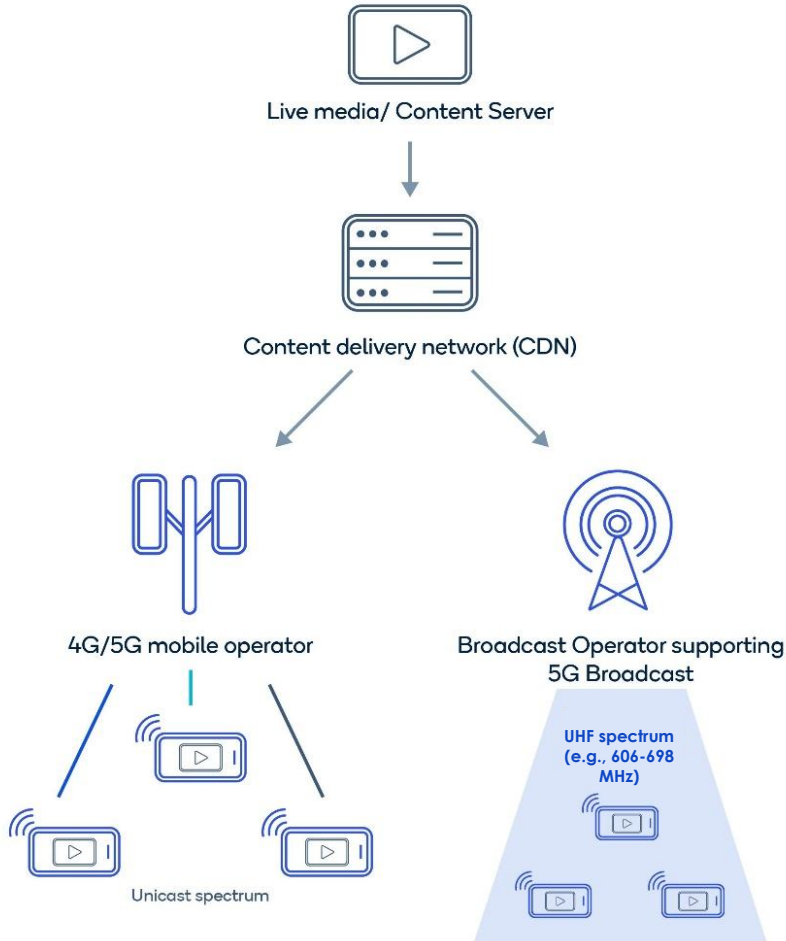
KANTAR

Confidential

Angaben in Prozent; * Hier wurde nicht explizit nach DVB-T und DVB-T2 HD unterschieden; uneditierte Betrachtung
Basis: 40,350 / 40,684 / 40,768 / 40,868 / 40,546 / 41,248 Mio. HH in Deutschland (n= 7.083 / 8.281 / 7.507 / 6.763 / 6.451 / 2.065)

Source: Kantar for Media Broadcast

What is 5G Broadcast?



Source: based on Qualcomm

- **Enhancement of the broadcast UX with smartphones:**

- Free-to-air.
- Quality of Service, no buffering.
- Universal service.
- No data consumption.
- Less carbon footprint.

- **Maximisation of benefits** delivered by each infrastructure:

- Service continuity (e.g., in the case of blackouts).
- 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



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

Tried & tested



5G Broadcast trials

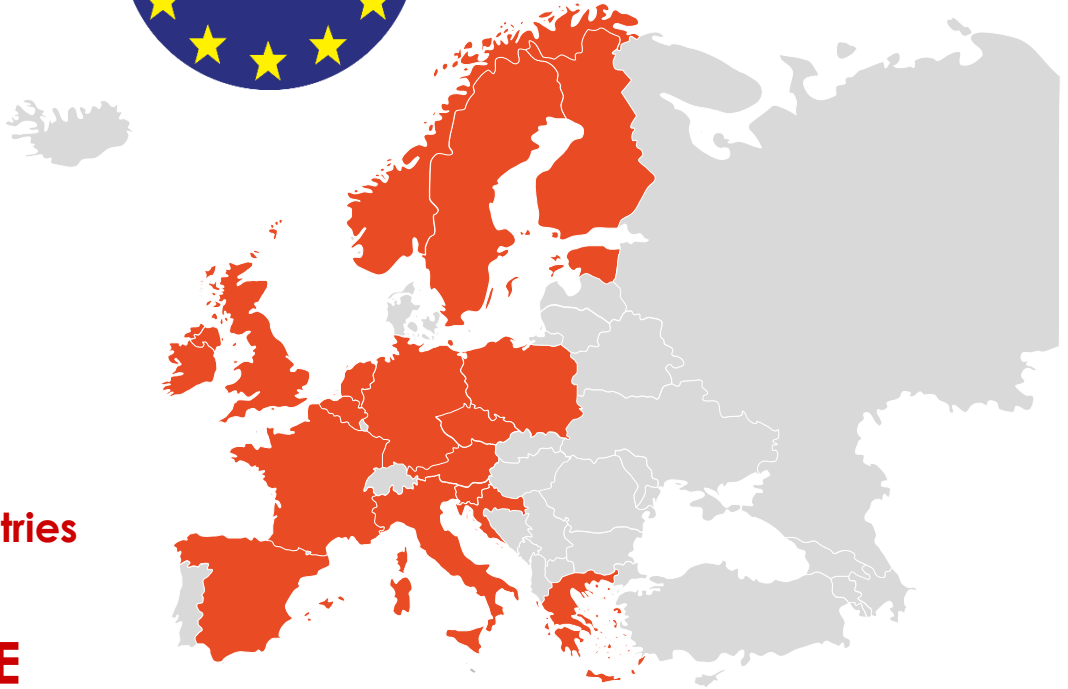
24 trials

18 countries

Involving

67 companies from **20** countries

65 of them based in **EUROPE**



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

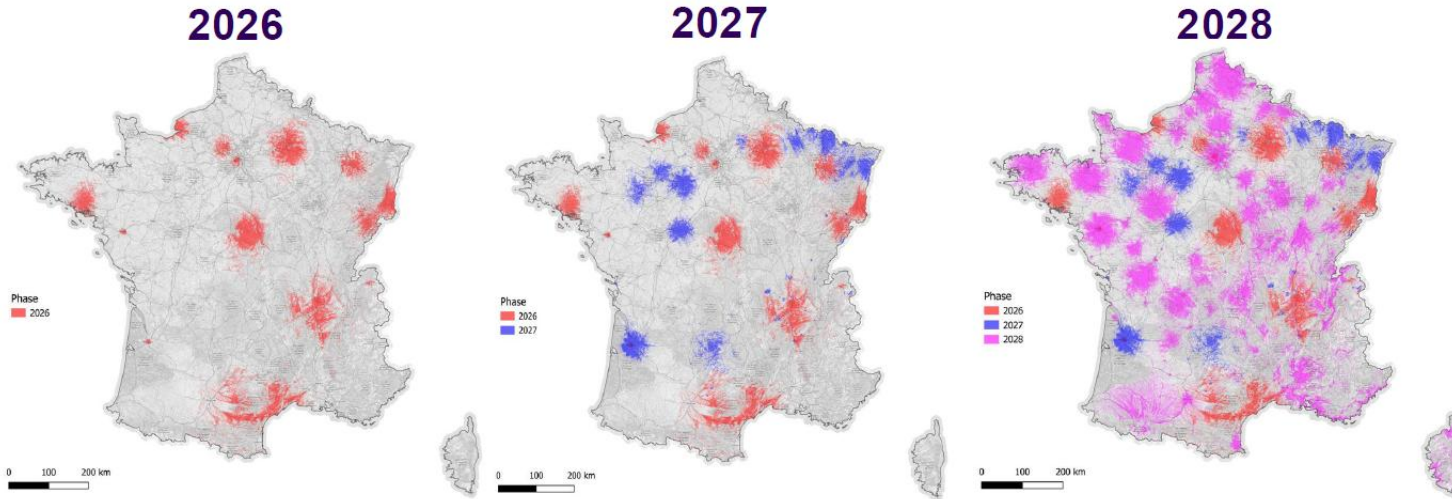
Business development behind 5G Broadcast



Full scale pilot deployment in France

Initial Deployments starting in 2026

Projects & target roadmap in France



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

+ 87 sites
+ 4,1 M inhabitants
= 12,3 M inhabitants

+ 329 sites
+ 28 M inhabitants
= 40,3 M inhabitants

5G Broadcast Horizons – a credible introduction scenario

2027


 27 M

 0

 0

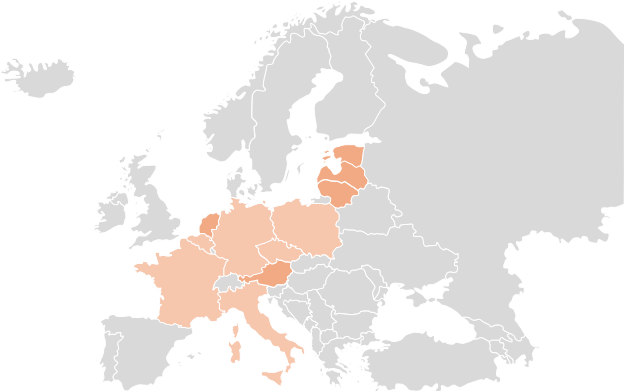


2028

 139 M

 2 M

 0 M

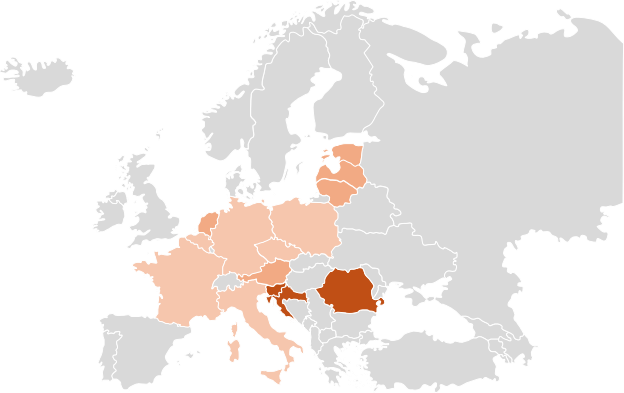


2029

 211 M

 55 M

 3 M

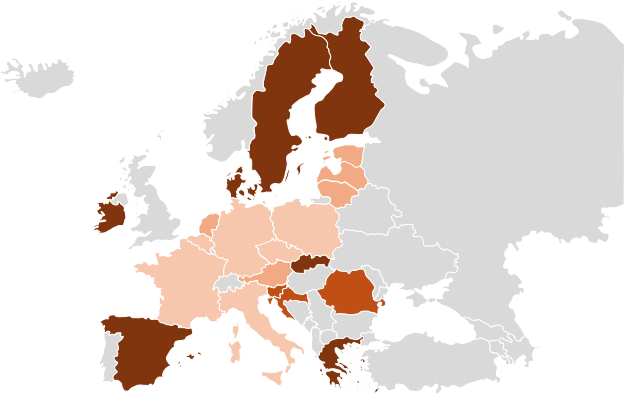


2030

 276 M

 104 M

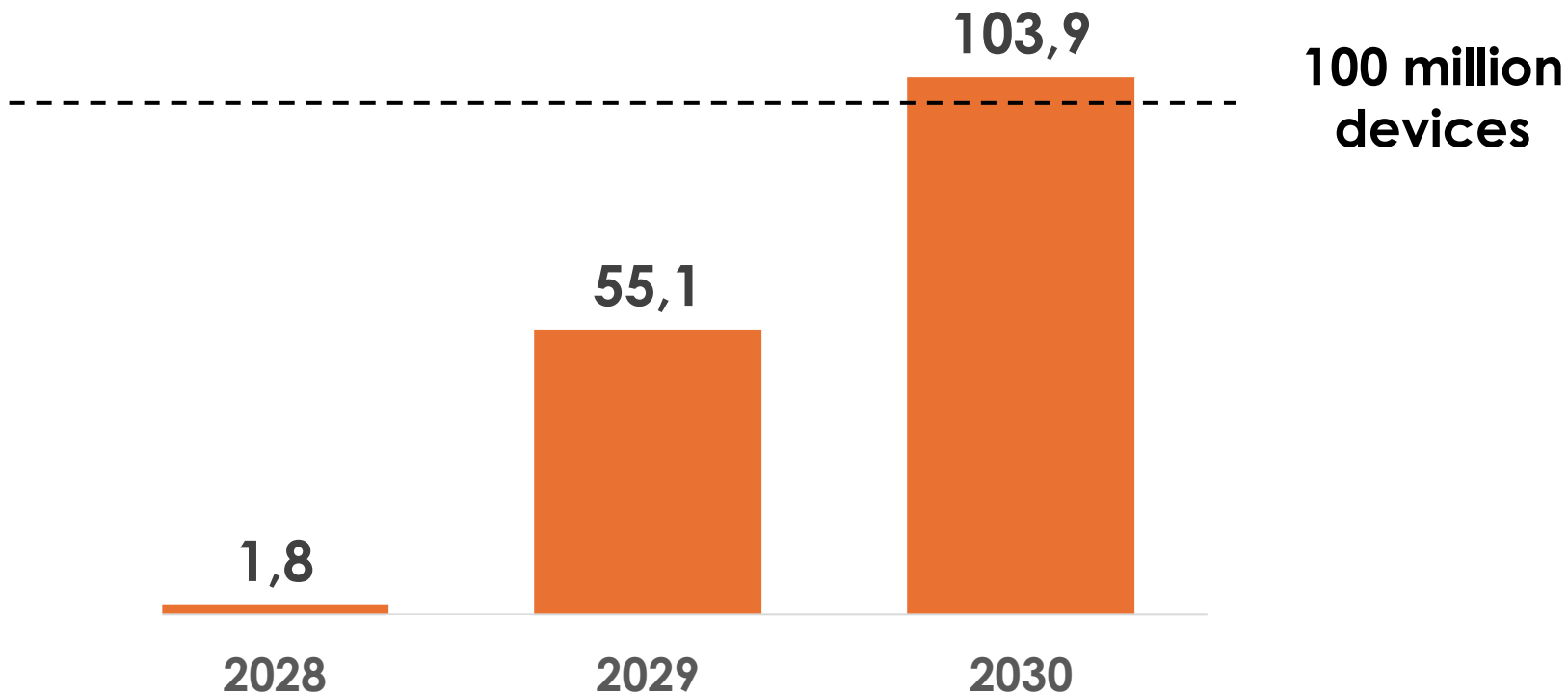
 12 M



CONTEXT



BASELINE
SCENARIO



Regulatory challenges and opportunities

- 5G Broadcast needs access to the 600 MHz band
- Spectrum at international level: the current primary allocation of the sub-700 MHz band (470-694 MHz) to the Broadcasting Service will be discussed at the WRC-31 for CEPT countries, with an agenda to be confirmed at WRC-27
- Spectrum at CEPT level and EU level: CEPT/FM51 group and a group of the RSPG will study how to introduce flexibility (eg telecom uses) in the 470-694 MHz band
- The Digital Networks Act, under discussion in the EU after a proposal by the Commission, will impact current spectrum governance and policy and may or may not include supportive measures for terrestrial broadcasting (TV, radio, and 5G Broadcast)

Why should MBT participants get involved in the discussions?

1

Originally pushed by broadcast friendly vendors, by EBU and BNE members, there is now a **realistic path** to create a **direct link** between broadcasters and their audiences in the smartphone.

2

5G Broadcast can act as a **business and editorial lever** providing strategic value to **reinforce the link with younger audiences**, fulfil PSM remit and develop advertising market.

How to make 5G Broadcast happen in Europe?

1

Engaging in a **dialogue with stakeholders**, inc. public and commercial broadcasters, BNOs, MNOs, chipset makers and mobile vendors.

2

Leveraging the **Digital Networks Act** and the **European Single Market** to ensure 5G Broadcast chipsets are widely adopted in mobile devices.

The window of opportunity is now

