

NEREC

Second Annual Research Conference on
ELECTRONIC COMMUNICATIONS

Josep Ventosa

Madrid, October 29th 2010



Who are we ?

MEMBERS : 14

- Abertis
- Arqiva
- BSD
- Digea
- Elettronica Industriale
- Norkring
- OIV
- ORS
- Swisscom Broadcast
- Radiocom
- RaiWay
- RTENL
- TDF
- Teracom

COUNTRIES : 20

- Spain
- UK
- Denmark
- Greece
- Italy
- Norway, Belgium, Eslovenia
- Croatia
- Austria
- Switzerland
- Romania
- Italy
- Ireland
- France, Germany, Finland, Estonia, Hungary
- Sweden



abertis
telecom



arqiva



Broadcast Service
Digea




GRUPPO MEDIASET
ELETTRONICA
INDUSTRIALE
TELECOMMUNICATION TECHNOLOGY



norkring



OIV



ORS



SOCIETÀ PER AZIENDA
DEI RADIOCOMUNICAZIONI S.p.A.
RADIOCOM



Rai Way



RTÉ NL



swisscom



tdf



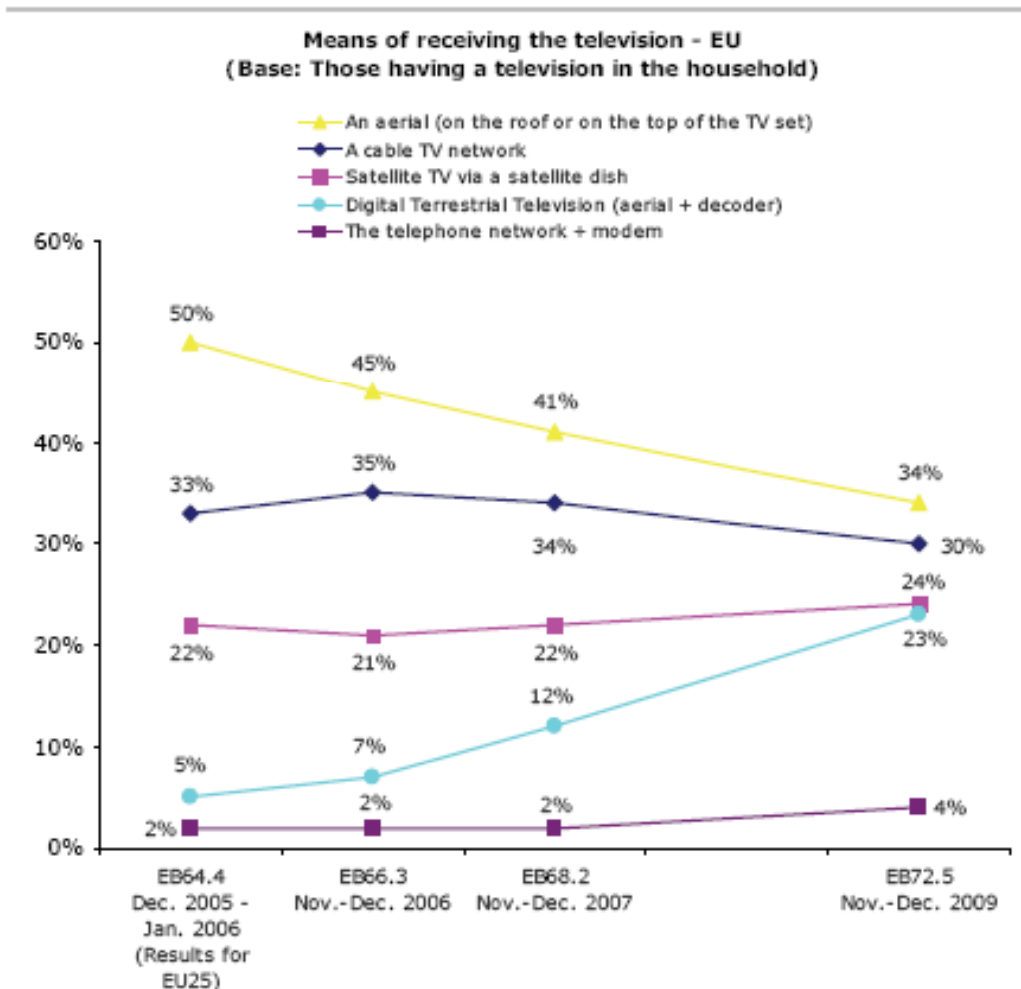
TERACOM

Mission and Objectives

- Provide a forum for information exchange and cooperation on topics of common interest between Broadcast Network Operators.
- Sustain and nurture the long term market opportunity for the distribution of content and data via terrestrial broadcast networks by :
 - optimising terrestrial platform developments and leveraging European-wide economies of scale.
 - ensuring availability of spectrum for current services to support future developments of the terrestrial platform.
- Represent the commercial interests of Terrestrial Broadcast Network Operators with regard to policy development and regulatory intervention with European Institutions.

DTT is already now a strong reality

6.2. Reception of the transmission via digital terrestrial television has doubled



Data from Eurobarometer show that in winter 2009 terrestrial was the main mean of TV reception in EU (57%), with DTT being the fastest growing mean

DTT is already now a strong reality

DTT households and sets

Figure 15: DTT households and sets estimates

DTT sets and households (millions)	Q2 2009	Q3 2009	Q4 2009	Q1 2010	Q2 2010
Total number of DTT enabled sets	29.7m	28.8m	28.5m	28.8m	28.8m
Percentage of all TV sets (%)	49.4%	47.7%	47.3%	47.8%	47.5%
Total number of homes using DTT equipment	18.2m	18.2m	18.6m	18.7m	18.7m
Homes percentage (%)	71.2%	71.1%	72.6%	73.1%	73.2%
Number of homes where DTT is the only digital platform	9.9m	9.7m	10.1m	10.2m	10.1m
Homes percentage (%)	38.8%	38.0%	39.8%	39.8%	39.3%

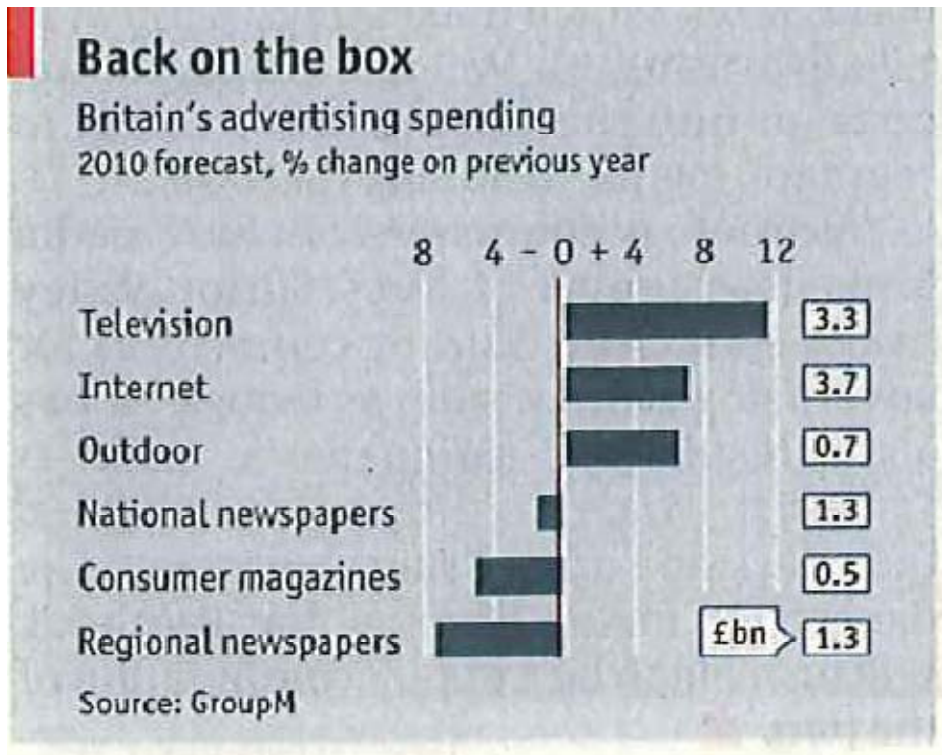
Source: GfK NOP research

Note: Figures in the table are rounded

- 3.28 DTT equipment was being used in 18.7 million homes by the end of Q2, taking account of cable and satellite homes using DTT on secondary sets. This was up by around 500,000 year on year, with 73% of homes now using DTT on either a primary or secondary set. The Consumerscope survey showed that DTT was the only digital platform in 10.1 million homes (39.3%) by the end of June 2010, up by around 120,000 year on year.

Ofcom Digital
TV Q2 2010
Report informs
that DTT
equipment is
being used in
73% of UK
households on
either a primary
or secondary set

DTT is already now a strong reality



The advertising market is recovering and TV and Internet are the winners.

GroupM forecast for 2010 predicts that TV advertising will grow by 11.6% in UK market

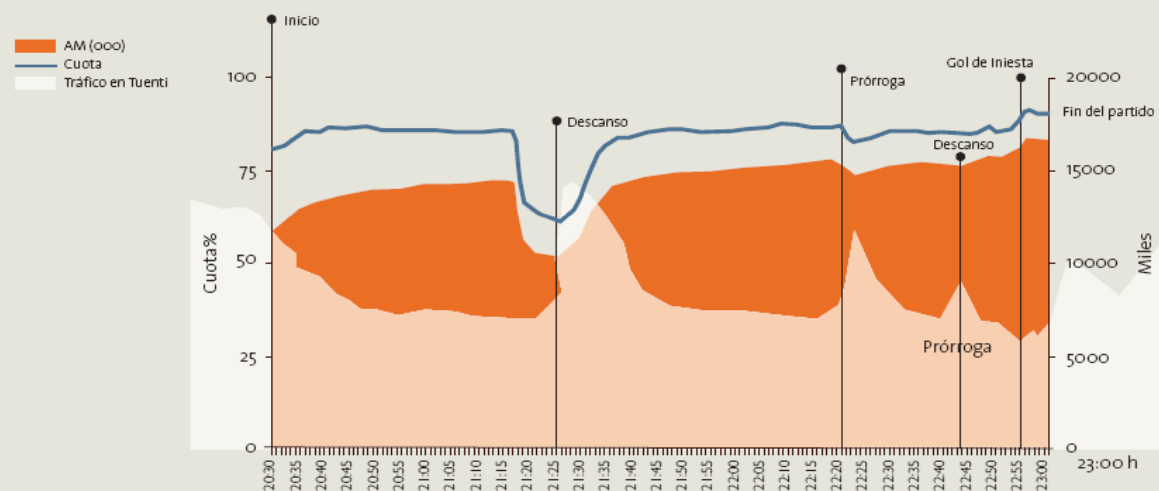
DTT is already now a strong reality

Spanish victory on the football world cup.

During the Final, DTT reached a record of 91% screen share and almost 17 million viewers in Spain, with a quality of service that networks other than broadcast, for instance broadband networks, are far to achieve for such a volumes of viewers.



Minuto a minuto partido final Holanda-España. Emisión en Telecinco, Canal+ y Canal+ Liga. Tráfico Tuenti



Fuente: www.periodistas21.com. Elaborado por Barlovento Comunicación según datos de Kantar Media.

RSPP Proposal

- We welcome the EU commitment for the NGA and the aim to foster efficient spectrum and infrastructure sharing to deploy NGA.
- We have some concerns about the RSPP proposal and we hope that it could be adjusted during the approval process in order to obtain a more balanced approach to the different services that are using spectrum.
- The spectrum use is very different in the different EU countries, so the countries could have different needs on how to manage the spectrum.

RSPP Proposal

- Regarding the date of 1st January 2013 to have the 800 MHz band available to MFCN services, we think that it will be very difficult to achieve in more countries. Even the RSPG Report on the RSPP proposed, after strong discussions, that the date has to be fixed as “during” 2015.
- We need also to secure that the compensation for the cost to migrate the DTT services already deployed in the 800 MHz band won't be considered state aid, but compensation for cost derived from a regulatory change that has been taken when the ASO process was very advanced or even finished.



October 2010

Minimising the potential interference to Digital Terrestrial Television (DTT) broadcasting services from Mobile/Fixed Communications Networks (MFCN) operating in the 790-862 MHz frequency band

Joint recommendations from DigiTAG¹, EBU², BNE³, ACT⁴

Introduction

Terrestrial broadcasting has an important societal role and economic value. The analogue to digital television switchover, which requires considerable investments and commitments from broadcasters, network operators and viewers, will result in releasing a 'Digital Dividend' in frequency spectrum.

Several national Administrations have decided to allocate the 790-862 MHz frequency band (the 800 MHz band) to mobile/fixed communications networks (MFCN), following the switch off of analogue terrestrial television services.

The European Commission issued a Decision (2010/267/UE) on harmonized technical conditions of use of this frequency band in the European Union by MFCNs. This decision is based on studies carried out by the CEPT, the results of which are published in CEPT Reports 30 and 31.

These harmonised technical conditions have been derived aiming to reduce the risk of disturbance that the implementation of MFCN in the 790-862 MHz frequency band may cause to Digital Terrestrial Television (DTT) broadcasting services in the lower adjacent band. However, as expressed in the CEPT Report 30, the concept of 'block edge masks' used to define these conditions does not always provide the required level of protection for victim services and, in order to resolve these cases of interference, additional mitigation techniques would need to be applied.

The EC Decision (Article 2, second paragraph) also states that Member States shall ensure that the new systems in the frequency band 790-862 MHz provide appropriate levels of protection to systems in adjacent bands, e.g. DTT broadcasting services.

¹ Digital Terrestrial Action group, www.digitag.org

² European Broadcasting Union, www.ebu.ch

³ Broadcast Networks Europe, www.broadcast-networks.eu

⁴ Association of Commercial Television, www.acte.be (in the process of final internal approval)

RSPP Proposal

There are also strong concerns on the potential Interference to DTT services from MFCN operating in the 800 MHz Band.

ACT, BNE, DIGITAG and EBU have co-signed a Joint Recommendation to apply protection measures prior to the award of licences for use of the spectrum.

The associated cost of the measures or remedies to be taken should not be borne by broadcasters, broadcast network operators or viewers.

ACT, BNE, DIGITAG and EBU members are fully open for cooperation with Administrations, Regulators and all parties interested in the use of the 800 MHz Band, in the context of these recommendations.

RSPP Proposal

- The success model of the ASO could be replicated with the Digital Dividend migration if we get the same commitment from all the stakeholders. But ...
 - Very unlikely this may happen before 2015.
 - Digital Dividend at 800MHz should be considered as the long term baseline framework of spectrum where DTT should develop as a competitive platform.
- DTT may not deal with any other digital dividend that could be anticipated for many years, and ultimately we have to consider how the citizen will be better served.



Thank you for your attention !

josep.ventosa@broadcast-networks.eu