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5G BROADCAST HORIZONS FOR EUROPE

Your trusted content lifeline reaching you every day, resilient when it matters most, for all, at scale

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Broadcast Networks Europe (BNE) v3

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	GRUPPO MEDIASET 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		



Society needs are evolving with digitisation



- increasing shared dependencies on IP/mobile infrastructure
- cascading risks in the event of power, cyber or telecommunications outages
- need for an independent terrestrial fallback path, with the proven strategic resilience value of terrestrial broadcasting
- Broadcasting is not only a mass medium, but also a warning system that is largely independent of foreign companies and states. It is part of national critical infrastructure.

5G BROADCAST – A EUROPEAN JOURNEY

CONSTRUCTIVE EUROPEAN GUIDANCE

- 2015-2017 **Lamy Report**, and **UHF Decision** encouraging convergence between AV and mobile internet platforms
- Sept 2019: **5G-MAG** launched at the initiative of EBU with BNE founding member
- 2022: **BNE/DG CNECT** meeting showing the innovation roadmap (mobility, UHD, interactivity) -> Commission and Council decision ahead of WRC-23
- 2025: **BNE Brussels event** – 5G Broadcast- Horizon for Europe

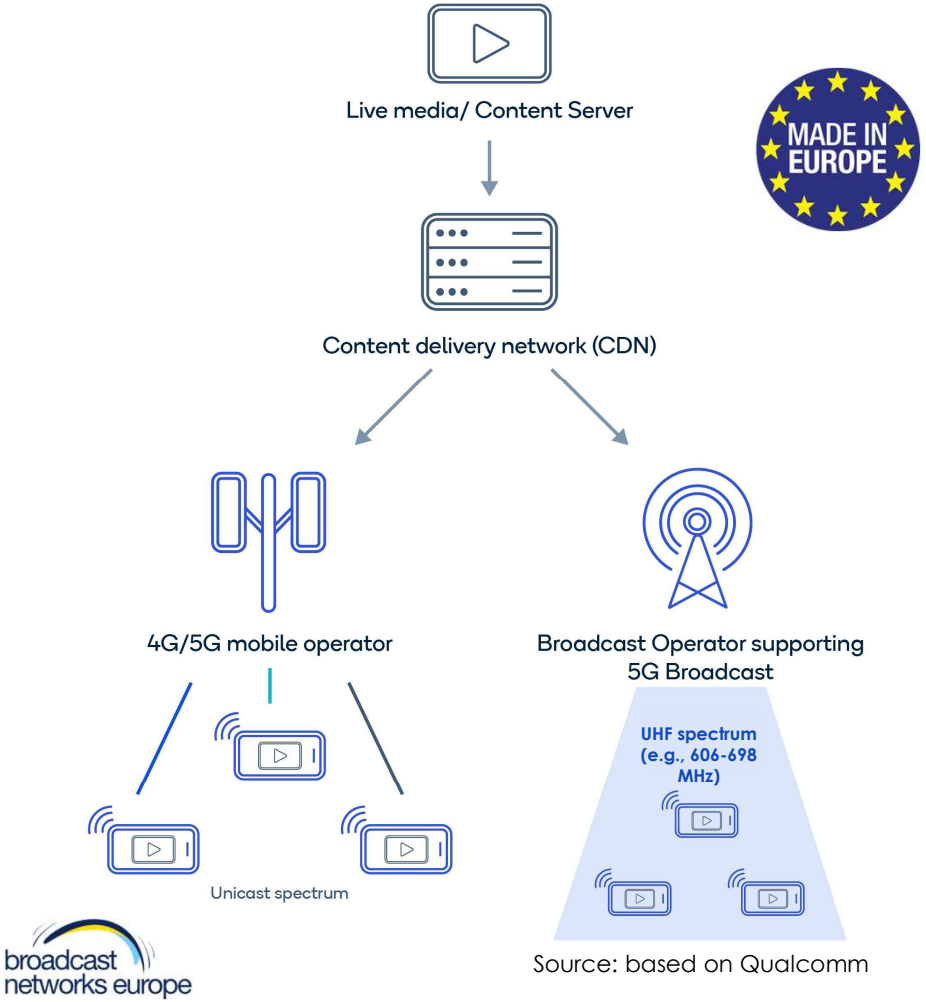
5G MAG MEDIA ACTION GROUP

European Commission
DG Connect

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What is 5G Broadcast?

Native convergence of terrestrial broadcast 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



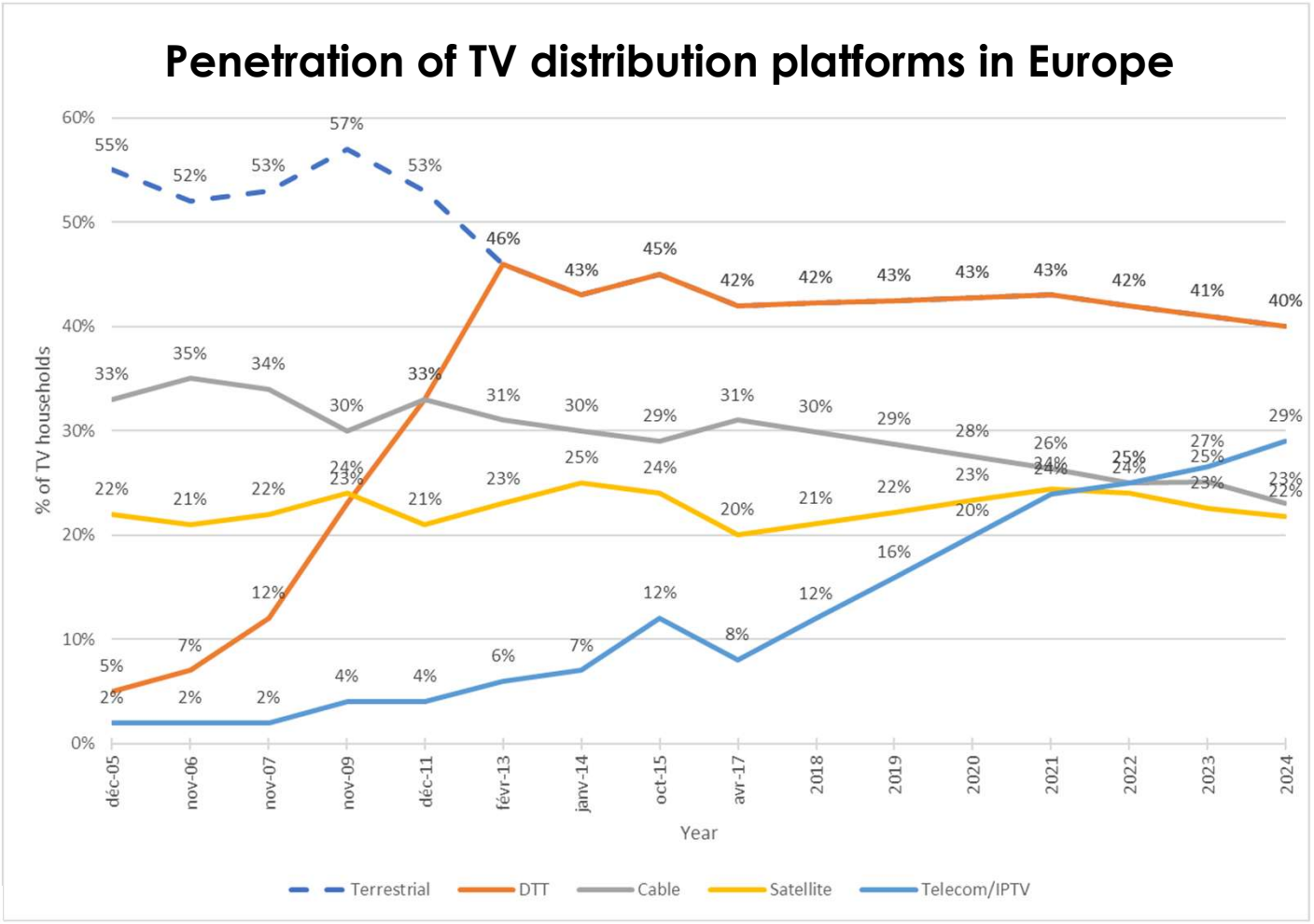
1st Use Case

Mobile live content...

... no congestion
... no buffering
... no SIM-card
... no data consumption
... with very low latency
... seamless switching possible

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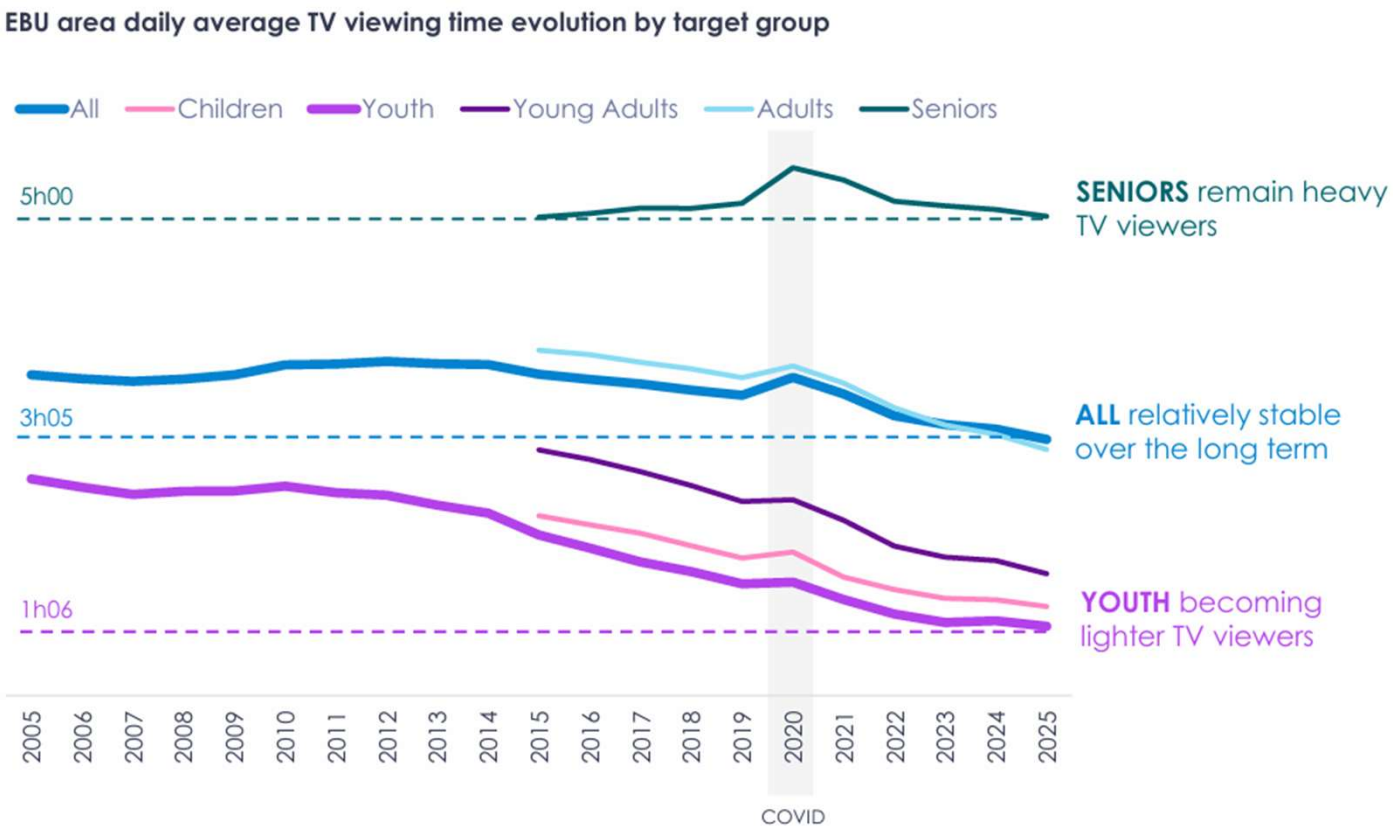
Terrestrial television remains very strong in Europe



- 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

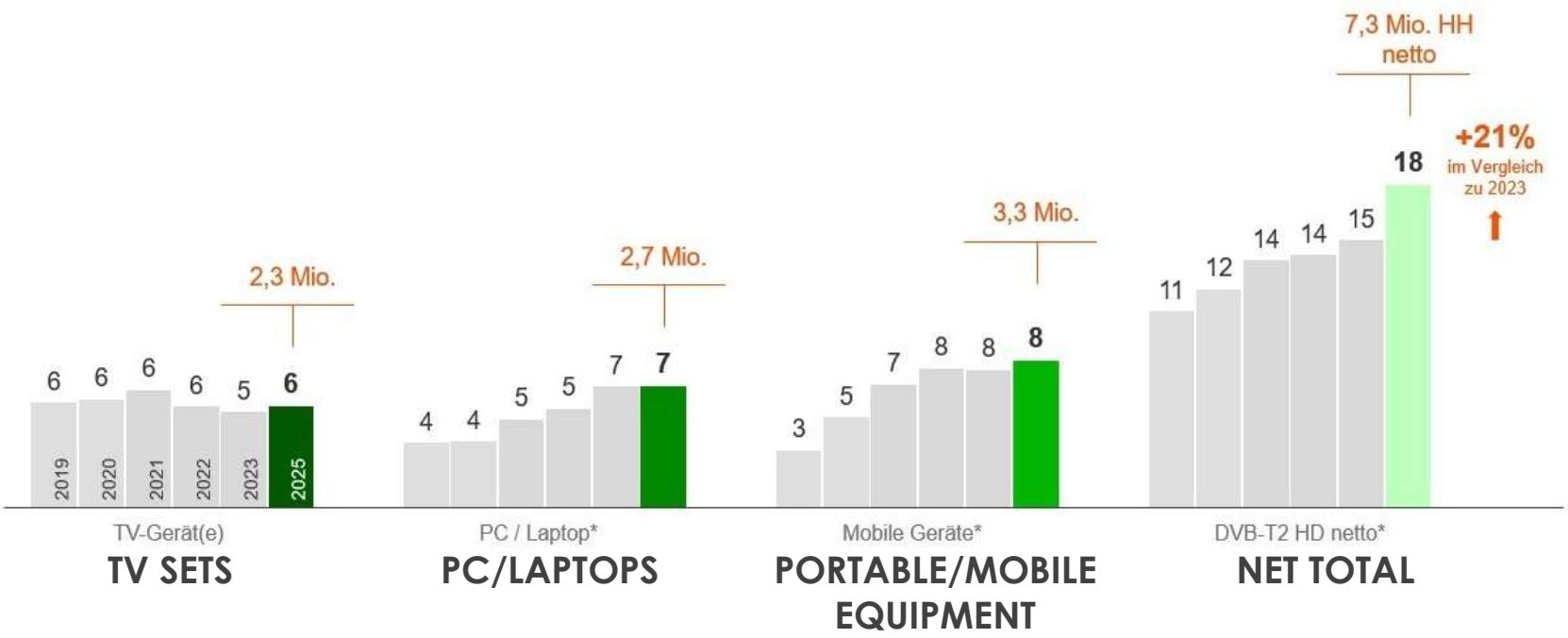
Usages are changing



Source: EBU, 2026

Consumption changes reveal the way to go

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



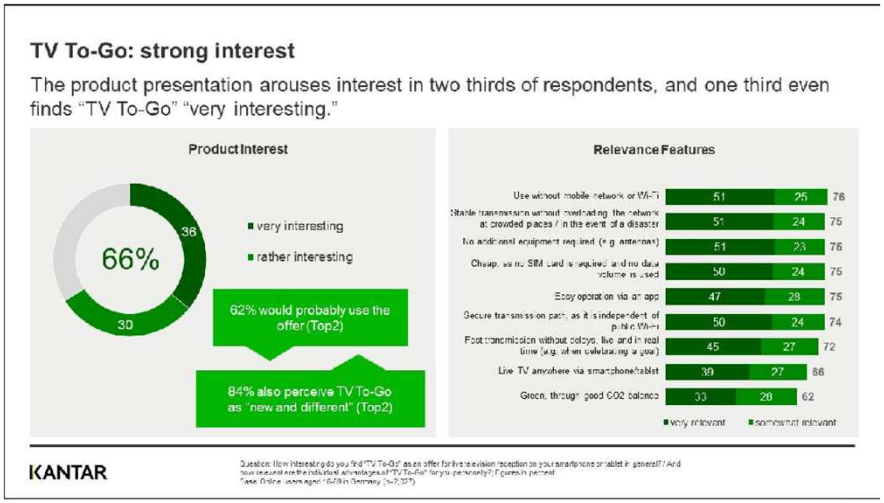
Source: Kantar for Media Broadcast

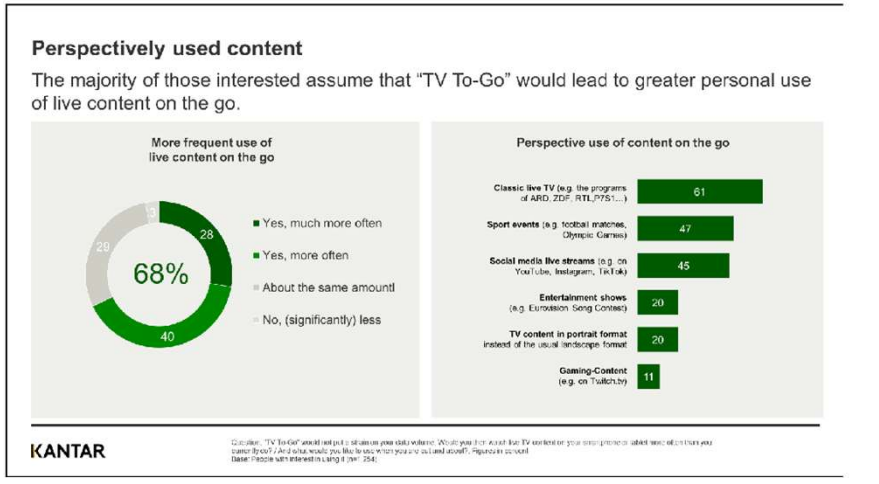
- DTT reach is growing in Germany
- Reaching 18% of households in 2025
- Sustained by the development of portable and 'mobile' usages

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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

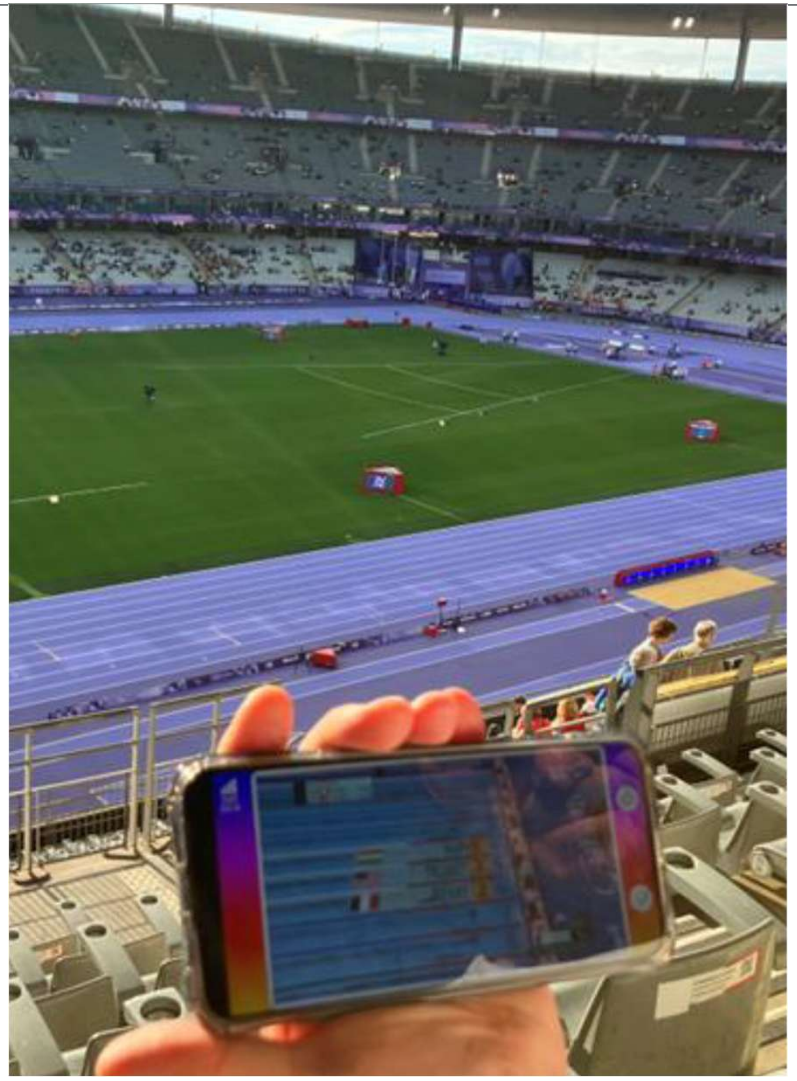




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Consumer interest- France (January 2025)

- 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





2nd Use Case

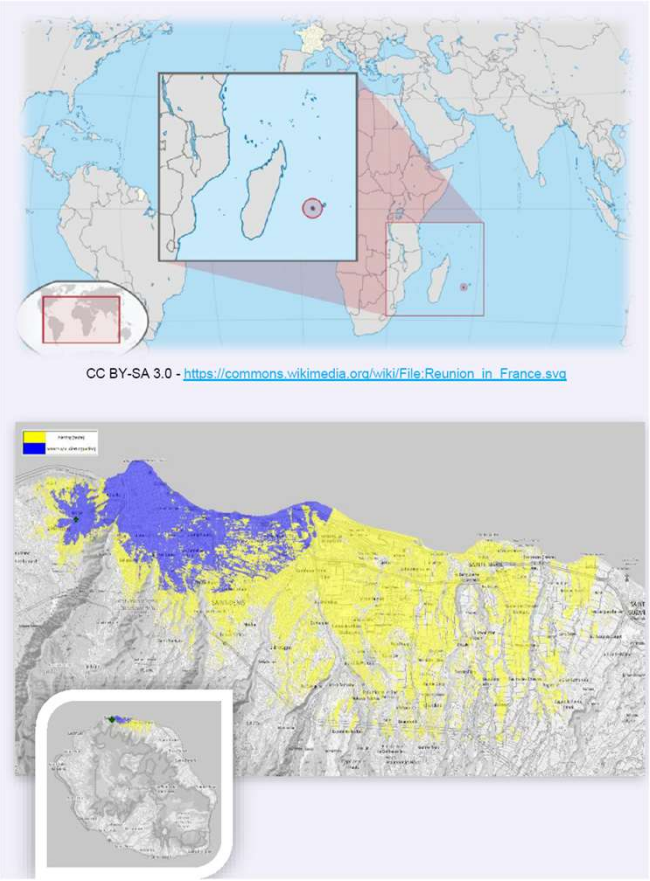
Integrated warning functionality …

… 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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1st + 2nd use cases: La Réunion experiment





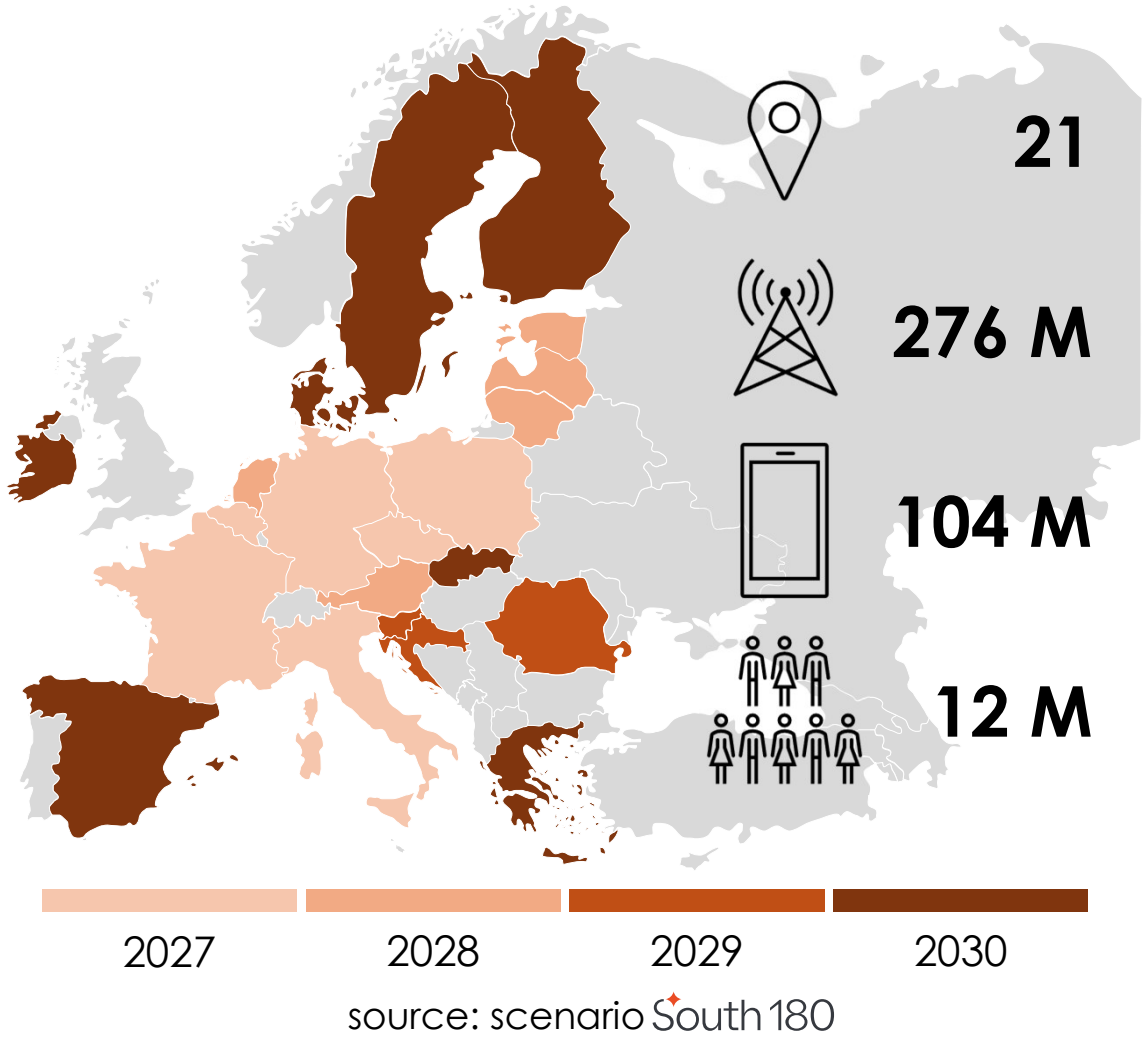
(sources TDF)

- 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

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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**



source: scenario South 180

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The challenges & opportunities - Spectrum

- Radio Spectrum Policy Group (RSPG) of 27 EU administrations is working on a "Guidance for alternative use of the 470-694 MHz band in countries where spectrum is available in the band."
- CEPT/ECC committee FM51 of 46 European administrations is working on a "Toolbox to enable flexible use of the 470-694 MHz frequency band".
- It is essential that the regulatory toolbox and guidance for flexibility remain compatible with a timely and European wide introduction of 5G Broadcast, which requires access to channels in rel 19 3GPP band 113 (606-698 MHz).
- **Ministries of interior and actors of resilience and internal security are kindly invited to express their potential interest for 5G Broadcast to spectrum management administrations.**

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The challenges & opportunities – European Regulatory Framework

- EU institutions (Commission, Parliament and Council) are reviewing the regulatory framework for digital networks through the Digital Networks Act (DNA).
- BNE has proposed amendments to the Commission's DNA proposal to facilitate the launch of 5G Broadcast for pocket siren.
  - To article 107 on the transmission of public warning
  - To article 102, dealing with interoperability of consumer devices
  - To article 17 identifying 5G Broadcast in the EU spectrum roadmap
- **Ministries of interior and actors of resilience and internal security are kindly invited to share with the Telecom/Digital Ministries the value to support the development of a viable infrastructure and receiver ecosystem around 5G Broadcast.**

Conclusions

- Alongside IP and mobile networks, Europe needs a resilient, sovereign and ubiquitous digital broadcasting infrastructure to keep the public informed, particularly during crises.
- 5G Broadcast provides this independent fallback layer, based on national infrastructures operated by national network operators under national regulatory oversight.
- This requires that public security authorities place 5G Broadcast on the EU political agenda, taking it into account in all legislative infrastructure measures, and expressing their support to enabling measures in the spectrum discussions and receivers.