South 180 FUTURES STRATEGY IMPACT

5G Broadcast horizons for Europe

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What is foresight?



Factoring in the key predictors

INPUT

- Population projections
- 5GBC coverage estimates by broadcast network operators
- Smartphone penetration forecasts
- Mobile broadband take-up
- Use cases prioritization
- National particularities

OUTPUT

- 5GBC population coverage
- 5GBC-enabled devices penetration (≠ shipments)
- Monthly mobile live TV users

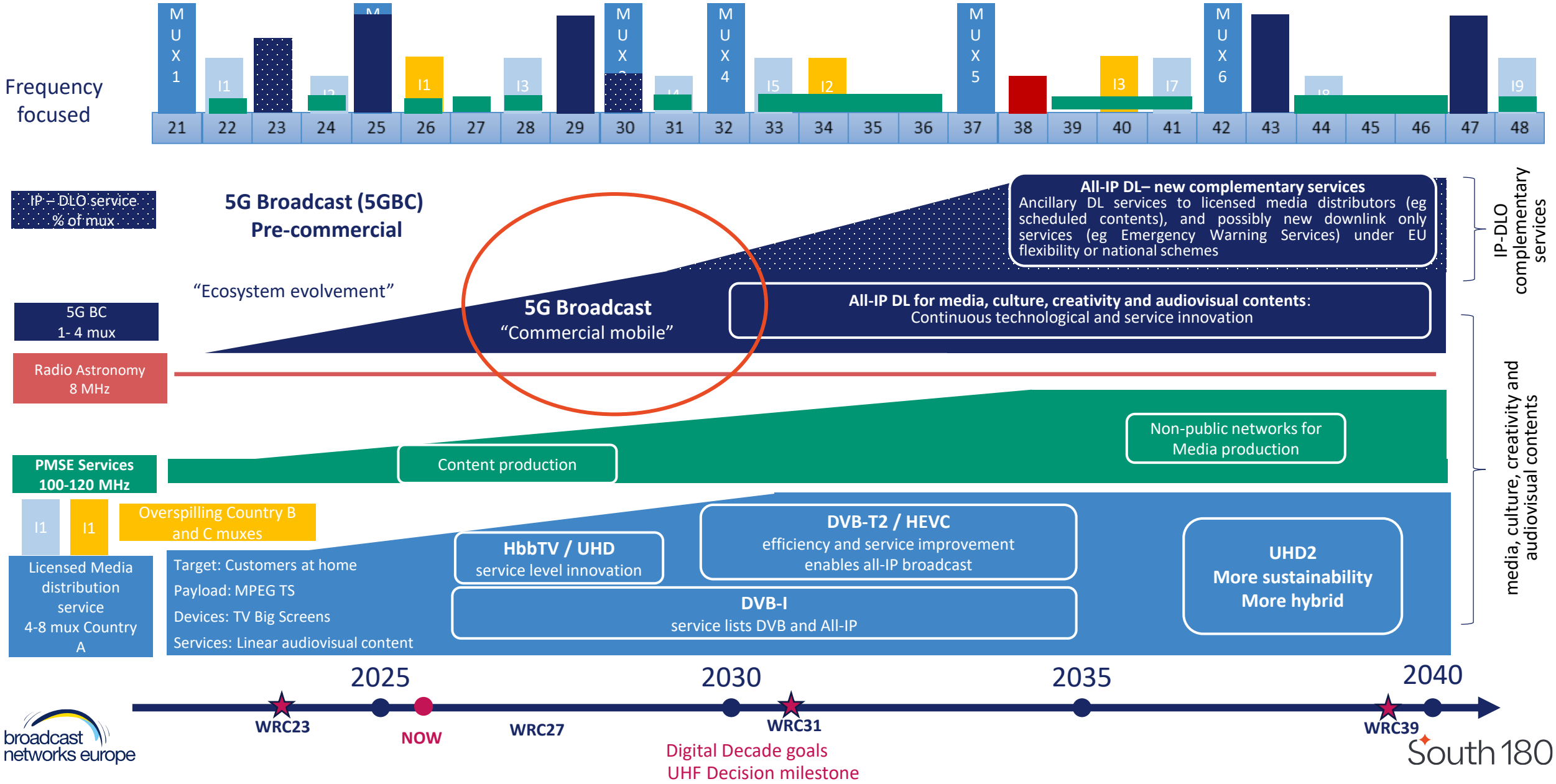
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Building on existing infrastructure



Highly-resilient infrastructure already in use across Europe ensures a rapid 5G Broadcast deployment

Terrestrial broadcast innovation roadmap for more quality, hybrid interactivity and mobility in a scarce UHF spectrum



broadcast networks europe

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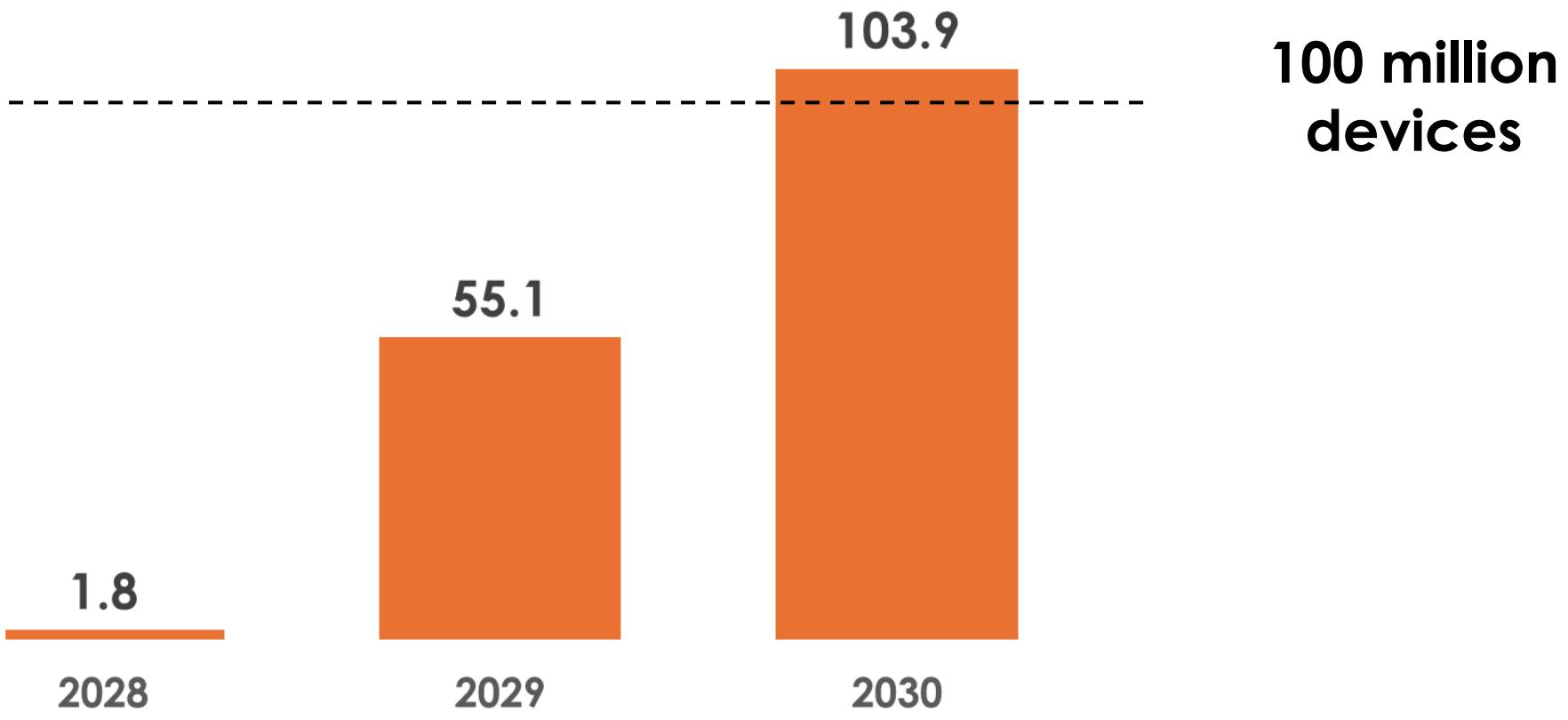
Horizons for 5G Broadcast



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The road to 100 million devices

BASELINE SCENARIO



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Horizons for 5G Broadcast in the European Union

2026

0

0

0

0



Horizons for 5G Broadcast in the European Union

2027

	6
	27 M
	0
	0

2027

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Horizons for 5G Broadcast in the European Union

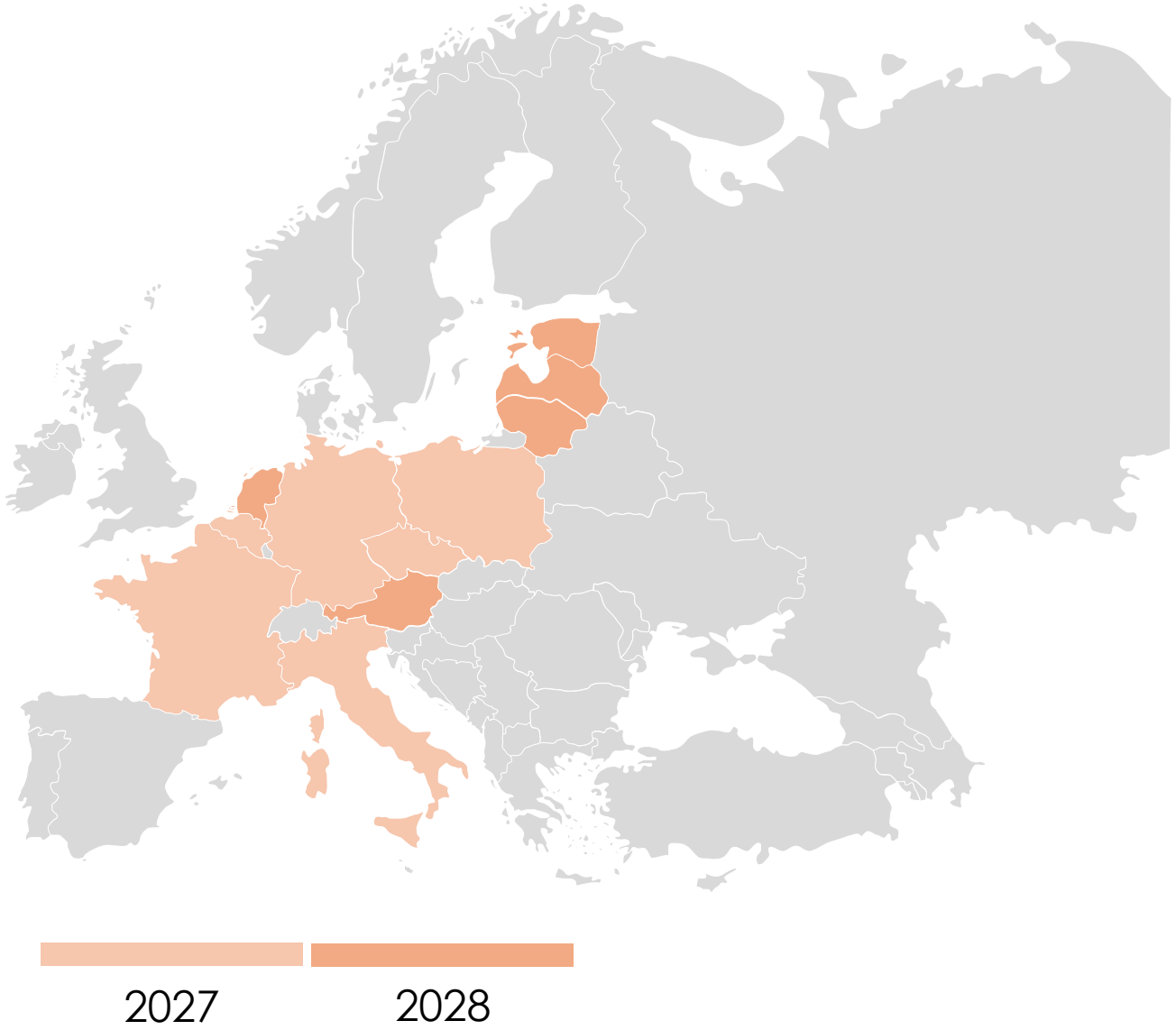
2028

11

139 M

2 M

0 M



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Horizons for 5G Broadcast in the European Union

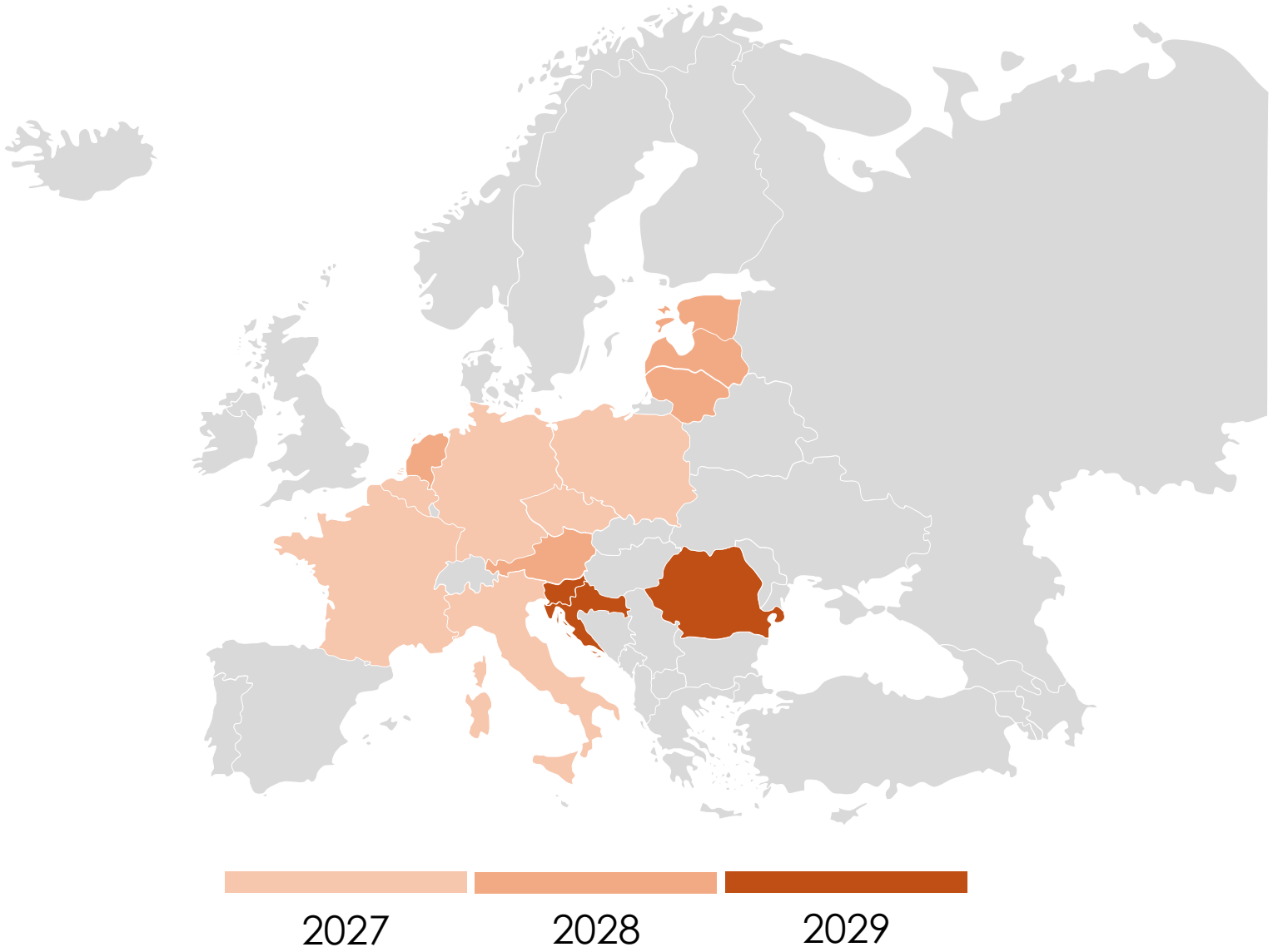
2029

14

211 M

55 M

3 M



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Horizons for 5G Broadcast in the European Union

2030

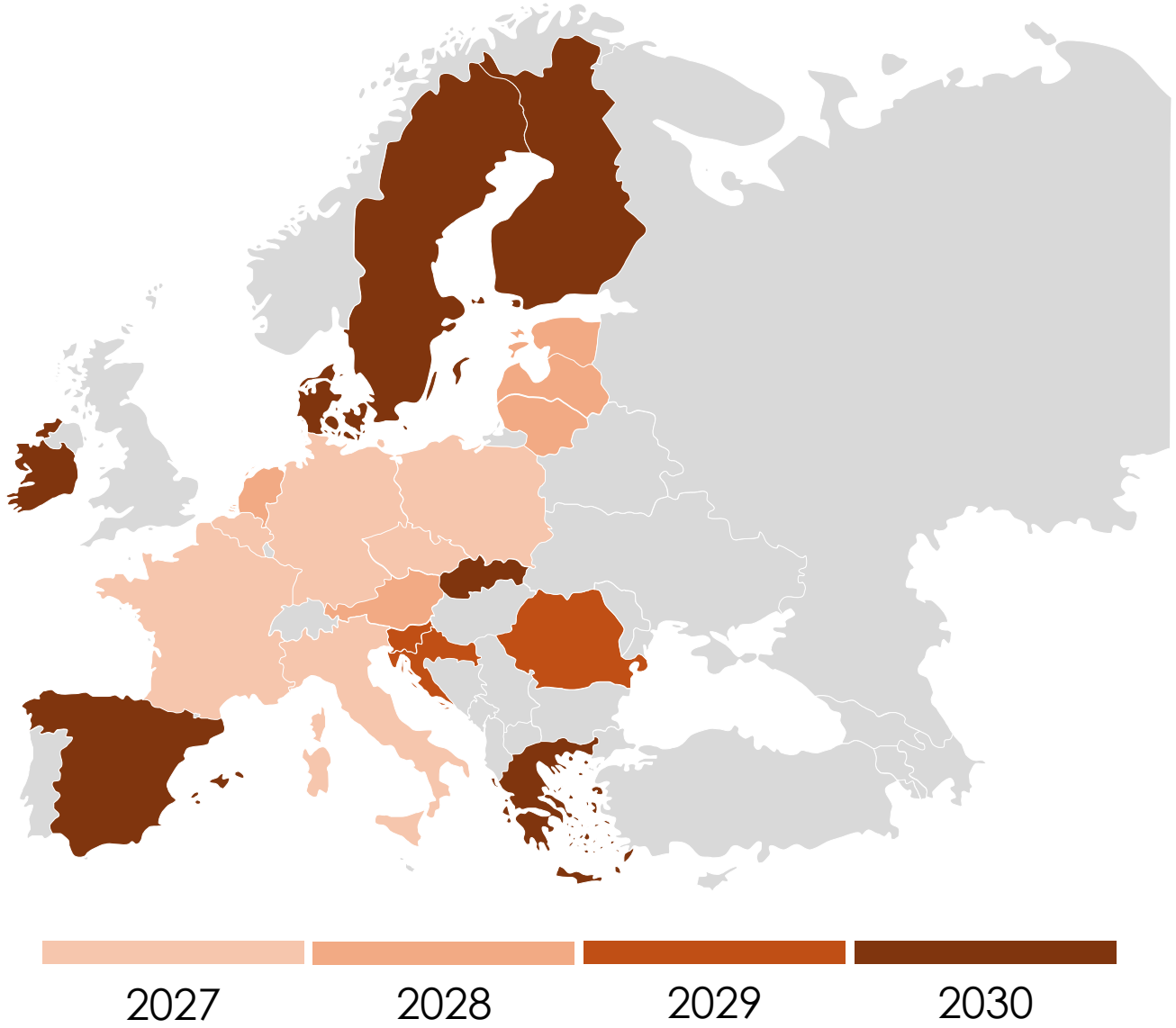
21

276 M

104 M

12 M

YALLA VAMOS 2030



And Estonia?



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5G Broadcast Horizons – a credible introduction scenario

2027

0

0

0

2028

962 K

6 K

0 K

2029

1,235 K

226 K

18 K

2030

1,303 M

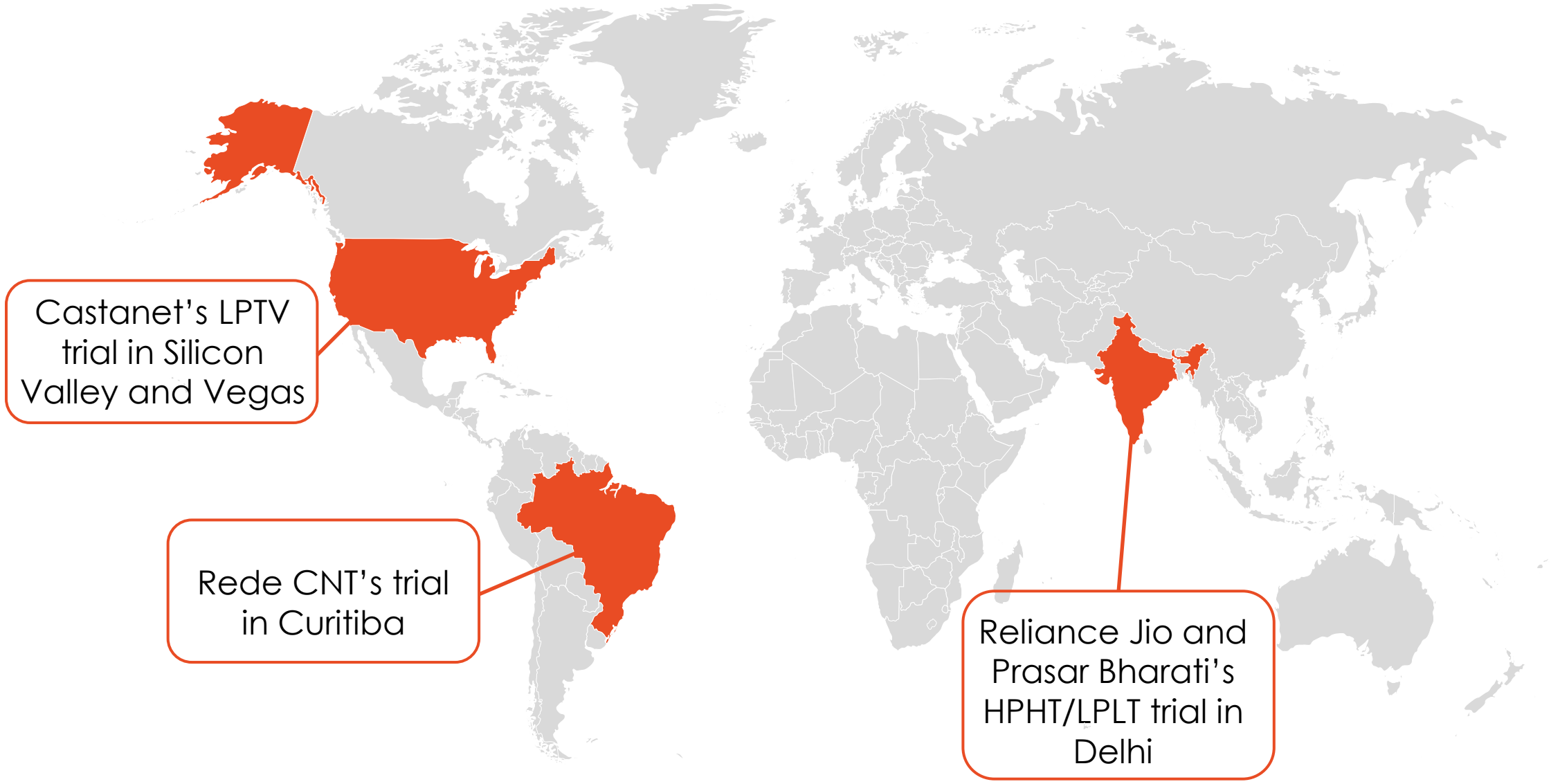
493 K

44 K

Beyond Europe



Interest spanning beyond Europe



Key takeaways



Two foundational requirements

1

Ensuring all new mobile phones include **5G Broadcast enabled chipsets** in Europe from 2029.

2

Guaranteeing long term access to the UHF band for terrestrial broadcasting, noting the **key value of the 600 MHz band for 5G Broadcast** for inclusion in smartphones.

Conclusions



- For the first time, local content and public warning can reach citizens, with a regulated and resilient channel directly into their smartphones, without gatekeepers.
- The window of opportunity to turn 5G Broadcast into a success story in the digital world is now.

The window of opportunity is now



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