

Why we need a European Radio Spectrum Policy

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Agenda

- **Role of radio spectrum in daily life**
- **Spectrum & the internal market**
- **Economic contribution of spectrum**
- **A mobile world**
- **The need for a Radio Spectrum Policy for Europe**
- **Proposals from the RSPG on the RSPP**
- **Timeframe**

Spectrum essential to daily life

- **Broadcasting**
 - Radio, TV, satellite
- **Transport communications and navigation**
 - Aeronautical, Maritime, Road & Rail
- **Telecommunications**
 - Mobile, fixed, infrastructure (water, gas, electricity)
- **Security**
 - Defence, emergency services

All vital to our everyday lives (in economic and social terms)

Use extends from national through regional to global level

Spectrum & the internal market

- **Radio waves do not stop at borders**
- **Availability of spectrum on a harmonised basis**
 - **GSM classic success story – gave EU competitive edge globally**
- **Mobility now ‘taken for granted’**
 - **Products cross borders and users expect them to work seamlessly**
- **Common procedures facilitate market, e.g. R&TTE, EMC Directives**
- **IP access becoming a ‘right’**
 - **Spectrum has role in both access and infrastructure**
- **Spectrum has key role to play in EU:**
 - **Digital Agenda for Europe**
 - **Europe 2020**

Economic contribution of spectrum

- **Recent study* for EC estimates that the economic & social value of the digital dividend to EU is in the range €150-700 billion**
- **Study shows that opening up the 800 MHz band to wireless broadband services by 2015, in all MS under common conditions, would generate an added value of at least €17 billion and up to €44 billion, depending on the rate of growth and adoption of wireless broadband services**
- **Economic value of services derived from radio services estimated at ~ 2.5% of aggregate EU GDP and spending on mobile networks in the coming years is expected to largely outpace the average growth of the telecom equipment manufacturing sector**

**Exploiting the digital dividend – A European approach:*

Report for the EC by Analysys Mason, Dotecon, Hogan & Hartson

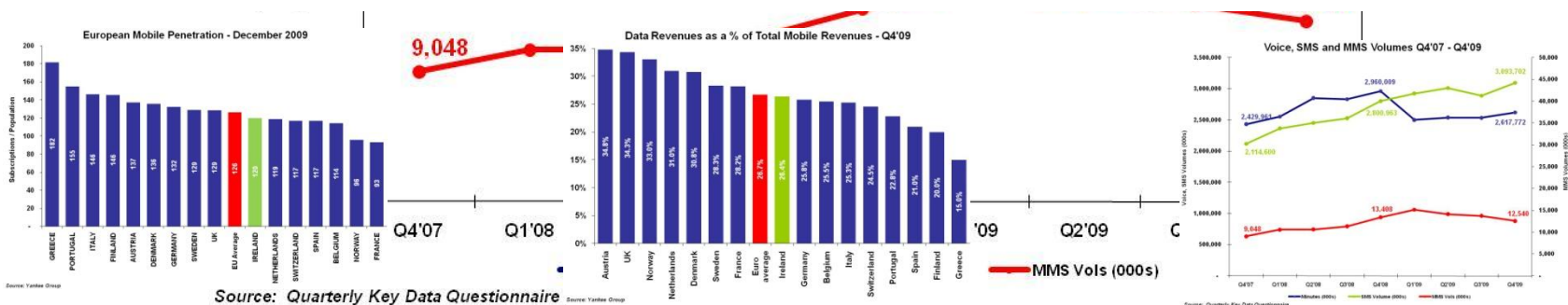
A mobile world (1)

Voice, SMS and MMS Volumes Q4'07 - Q4'09

3,500,000

50,000

- ✓ Penetration rates in nearly all MS >> 100%
- ✓ ARPUs declining
- ✓ Ongoing growth in voice minutes, SMS, and MMS
- ✓ Data now averages 25% of mobile revenues across EU



A mobile world (2)

- **RFIDs***
 - **high growth potential: in 5 years estimated that more than 170,000 RFID readers will be deployed in Europe at 30,000 locations processing ~ 3 billion tags**
 - **By 2022 >6 billion readers will be operating at 450,000 locations, with about 86 billion tags purchased annually**

So, need for an organised, coherent, harmonised approach to spectrum to optimise the economic & social benefits is clear

****European passive RFID Market Sizing 2007-2022 – Bridge Project***

The need for a Radio Spectrum Policy for Europe

- **Increasing emphasis on WAPECS (technology & service neutrality)**
 - **Avoids MS attempting to pick winners; leaves to market to decide**
 - **Risk of fragmentation if not handled carefully**
- **Need overarching strategic vision on spectrum policies for future development of Europe**
 - **Trends, priorities, economic & social objectives**
- **RSPG establishes roadmap for those objectives**

Draft RSPG Opinion on RSPP

- **RSPG discussed the outcome of the Spectrum Summit at an extraordinary RSPG Plenary yesterday (23/03/2010)**
- **Public consultation envisaged shortly (once draft is finalised)**
- **Three main pillars of the draft Opinion under preparation:**
 - **Contribution to the EU2020 vision**
 - **Spectrum governance in the EU**
 - **External relations**
- **The draft Opinion will be completed with high-priority policy objectives**
- **The Opinion will cover the period from 2011 until 2015, however reflecting a longer term and forward-looking approach.**

Draft Proposals from the RSPG on RSPP (1)

- 1. Ensure that there is sufficient spectrum for coverage and capacity purposes so that all EU citizens have access to ubiquitous high-speed broadband**
- 2. Optimise the use of the digital dividend, including through the creation of a European harmonised band, with the proposed aim of making the 790-862 MHz band available across the EU for ECS other than broadcasting by specified date, subject to conditions**
- 3. Identify future significant uses of spectrum taking into account market and technology trends**
- 4. Take all actions to designate more 'new' spectrum and liberalise, where possible, currently used spectrum under service and technology neutral regimes (i.e. WAPECS)**
- 5. Make more spectrum available under a collective use model in order to facilitate rapid access to spectrum, promote innovation & competition**

Draft Proposals from the RSPG on RSPP (2)

- 6. Create appropriate regulatory mechanisms to foster more efficient use of spectrum, both for the commercial and public sector**
- 7. Develop a spectrum policy approach for intelligent spectrum sharing which should, inter alia, promote the use of cognitive technologies, and enable the use of spectrum that is currently unused**
- 8. Enhance collaboration and cooperation among competent national authorities (EC, CEPT, ETSI) to reach the same objectives and clearly define their respective roles and responsibilities**
- 9. Ensure that European spectrum interests and policy objectives are promoted in all relevant EU and international fora and discussed with non-EU countries and other regions**
- 10. Ensure that all Member States are given the necessary assistance when negotiating with neighbouring countries on cross-border coordination issues.**

Timeframe

- *RSPP WG #1* *8 February*
- *RSPG Plenary #21* *11 February*
- *RSPP WG #2 and #3* *22 February and 9 March*

- **Spectrum Summit** **22-23 March**
- **Extraordinary RSPG Plenary** **23 March afternoon**

- **Draft opinion finalised** **End March**
- **Public consultation** **April / early May**
- **Adoption of final opinion** **May (est. by extraordinary meeting)**

The logo for the Radio Spectrum Policy Group (RSPG) features the letters 'RSPG' in a bold, orange, sans-serif font. The letters are contained within a white, rounded rectangular shape that has a subtle gradient and a slight shadow, giving it a three-dimensional appearance. The background of the slide is a vibrant, abstract design with a red and orange flame-like pattern at the top, transitioning into a blue and white wave-like pattern below.

RSPG

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SPECTRUM
POLICY GROUP

Thank You!

Further Information

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