



Digital Dividend Review: Consultancy study

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Introduction to the study

Stakeholder engagement

The study aims to identify the optimum approach for releasing the spectrum...

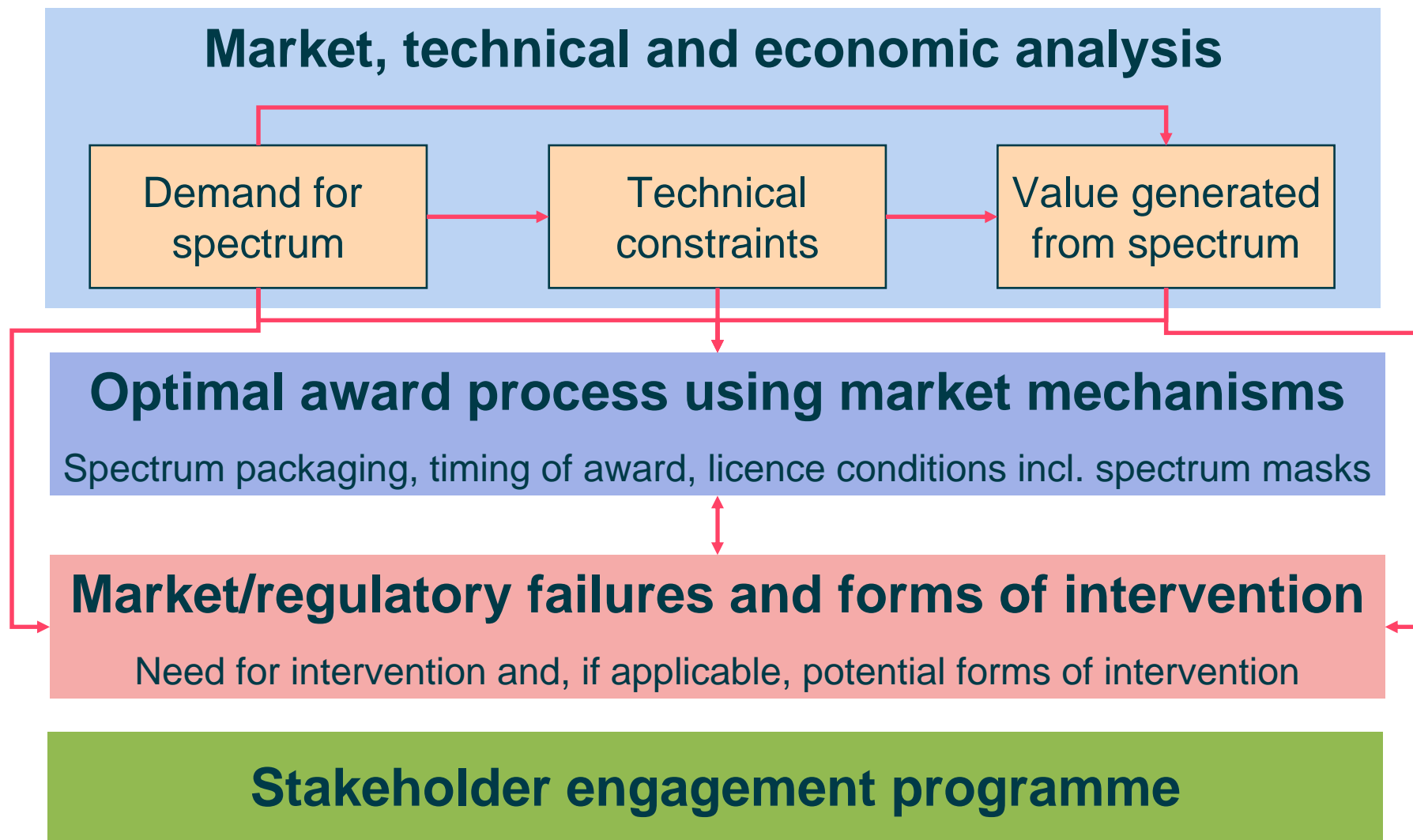
Identify optimum framework for releasing available spectrum* to the market in a way that maximises benefits for the economy and society over time

- Includes: design of award process, timing of award(s), packaging of spectrum and licence conditions (incl. spectrum masks)
- The project does *not* aim to administratively determine the future use of the spectrum

* the study will consider the UHF spectrum which may become available for award by Ofcom up to 2012, this includes:

- 112MHz of spectrum released by the digital switchover (14 x 8MHz channels)
- the interleaved spectrum within the 32 digital terrestrial television channels

... and includes a detailed market, technical and economic assessment



The outputs will include developing an award process for the spectrum

Timing of the award

When an award should take place and whether it should be awarded regionally as DSO occurs

Spectrum packaging

Defining the licences that will be available, e.g. channel size, paired/unpaired, regional/national

Licence conditions

Defining the spectrum mask and any restrictions on transmission rights

Award format

Is an award process appropriate for this spectrum or might intervention be required?

We have assembled a highly experienced consortium to undertake the study



Overall project management, lead market demand and stakeholder interaction activities and support technical assessment



Lead technical assessment, support definition of spectrum packaging and interference criteria



Lead economic analysis, auction design and market failure assessment activities



Support market demand and technical assessment activities

Damian Tambini

Lead assessment of the non-commercial value associated with potential alternative spectrum uses



The market, technical and economic analysis involves a wide range of activities

Market analysis

- * Identify alternative spectrum uses
- * Identify interest from different types of organisation
- * Estimate value of spectrum to potential bidders

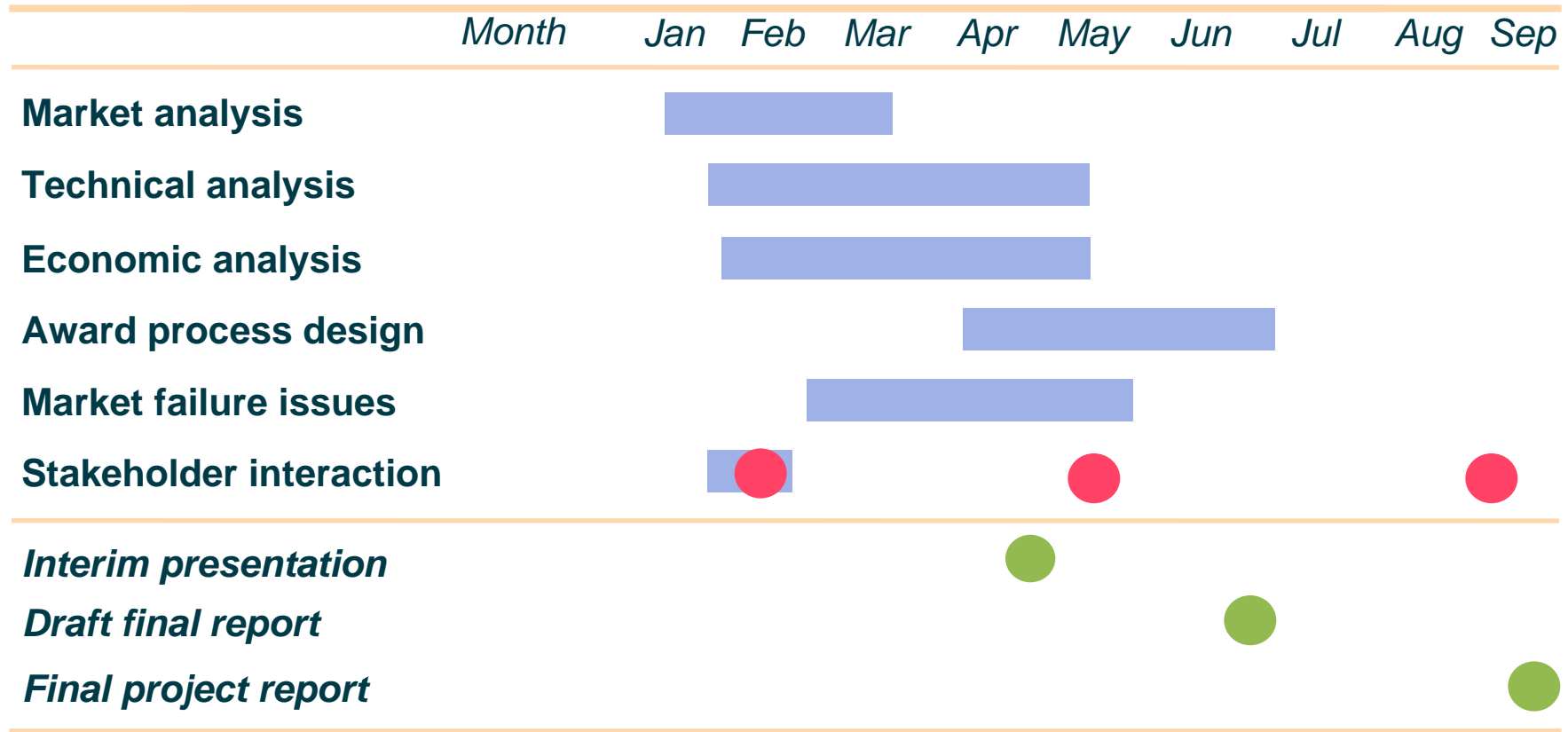
Technical analysis

- * Assess scope for combining different services/ technologies
- * Assess scope for use of alternative spectrum bands
- * Identify combinations which maximise value

Economic analysis

- * Quantify economic benefits arising from alternative uses of spectrum
- * Assess magnitude of non-commercial value benefits of alternative spectrum uses

The study is scheduled to be completed by the end of September 2006



Contents

Introduction to the study

Stakeholder engagement

Overview

- We welcome input from stakeholders into the Digital Dividend Review (DDR) consultancy study
 - z views/comments on the future use and award of the released spectrum
 - z any questions regarding the study should be sent to DDRconsultancystudy@analysys.com
- For wider questions on the DDR please contact Ofcom at DDR@ofcom.org.uk

Channels of communication

- There are three channels through which stakeholders can input into the study:
 - z stakeholder events
 - z interview programme
 - z email

Stakeholder events [1]

- We intend to run three stakeholder events
- You should have received an invitation to this afternoon's stakeholder event
- This afternoon event will include discussion about:
 - z potential services for this spectrum
 - z technical considerations
 - z how to capture the full value of the spectrum

Stakeholder events [2]

- Invitations will be sent out well in advance of future events
 - z to all stakeholders here today
 - z to anyone else that expresses an interest
- Unfortunately, numbers are limited for these events

Interview programme

- We are currently conducting a series of one-to-one interviews
 - z either by phone or face to face
 - z programme will run until 10 March
- The aim of the interviews is twofold:
 - z for us to understand more about potential services in this spectrum
 - z to capture stakeholders' views
- Please register today if you would like to take part

Email

- If you have any comments or questions regarding the study please email:

DDRconsultancystudy@analysys.com

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