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TECH.5 : FUTURE SPECTRUM NEEDS: SUPPORTING A DIGITAL TRANSITION

The future is wireless - but radio spectrum is limited. There has long been a need to find new ways of sharing spectrum and, with a future dominated by mobile broadband and consumer video, addressing that challenge has now become paramount. This session focused on how to meet these challenges across many different applications and uses of spectrum. It also looked at the issue of “digital dividend” spectrum resulting from the migration from analogue to digital terrestrial TV- a once-in-a-lifetime opportunity - but an opportunity that is by no means certain to materialize given other demands on this spectrum.

Moderator’s opening statement

Spectrum needs must be addressed in a way that optimizes use, innovation, service delivery across the many different applications and uses of spectrum.

The session also examined the topic of “digital dividend”- an increasingly prevalent phenomenon. The ICT industry is in a state of transition, with past industry structure, business models and traffic levels very different to what is likely to come in the future. And these changes that are occurring and how it reacts to them is one of the really urgent issues that the industry is facing.

Most people will agree that mobile broadband is growing, and some estimates suggest that traffic is increasing by 450% year on year but that revenues are staying static. The issues raised by this divergence between traffic and revenue growth focus on the sustainability of existing business models.

The historic model where both broadcasters and Telcos each provided distinct communication services has now gone. Broadcasters now provide communications services and telcos are providing unicast, podcast and broadcast content. The market structures are being changed and many firms are seeing opportunities in new but related market segments.