Wider Spectrum Group

2026

Introduction

Frequencies are the core spectrum resource for terrestrial broadcasting and PMSE (Programme Making and Special Events).

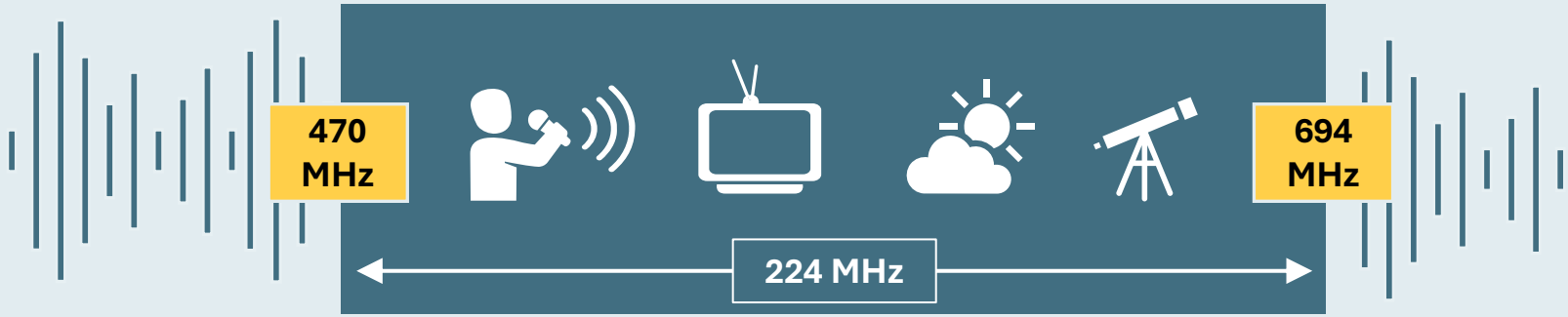
Their availability is crucial for the European creative and content industry from creation to distribution to consumers. It is also essential for European public service and democracy.

Indeed, the mix of reliable information and unconstrained culture is arguably as critical an ingredient to a nation's sovereignty as the mix of homegrown defense industry and independent defense forces is to national security.

The Wider Spectrum Group gathers 18 European and national organisations around the societal and economic stakes of spectrum allocation for the content and cultural industry.

The following slides collect relevant facts and figures to illustrate those stakes.

Frequency demand for culture in 470 – 694 MHz

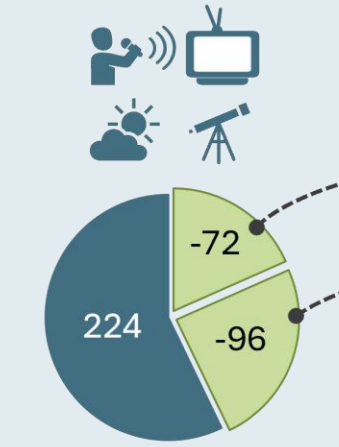


Since 2010, more than 40 percent of the TV-UHF spectrum has been reallocated to IMT (mobile phones) in “Digital Dividend 1” and “Digital Dividend 2”. Culture has lost a lot. Further transfers are no longer possible without great damage to culture.

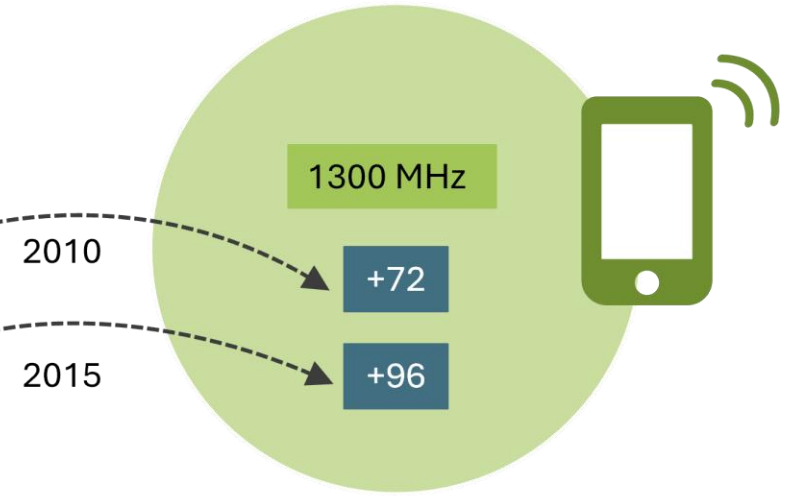
Source: BEIRG (PDF) and Fischer/Ackermann, FAU

Nothing new under the sun. Music and live performance needs frequencies to foster creativity, as much as frequencies need the talent of artists to fulfill one of their prime social and cultural roles, that of triggering empathy and sympathy between artists and their public, or within the audience itself via a temporary sense of community (or, again, sympathy).

Events need frequencies for their wireless microphones and other production equipment: “Programme Making and Special Events (PMSE)”. The frequencies in question range from 470 to 694 MHz, known as the “TV-UHF spectrum” or “cultural frequencies”. This is where terrestrial distribution of television takes place, with DVB-T2, and, in the future, 5G Broadcasting. Broadcasting and PMSE share the frequencies efficiently!



until 2010: 392 MHz



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Frequency demand for culture in 470 – 694 MHz

Use cases

News gathering
Academic conferences
Mobile journalism
Theater
Political and business events
School performances
Religious venues/worship
Festivals
Sporting events
Film production
...

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Frequency demand for culture in 470 – 694 MHz

Artists and musicians need TV-UHF frequencies for the interference-free operation of wireless microphones, in-ear systems, talkback systems and audio links. Trade fair and conference organizers, universities and many others also have a need.
The amount of spectrum necessary every day for culture was established by the EU in 2014: at least 96 MHz. This baseline figure has grown since then.

Today, culture needs at least 110 MHz daily. For major events, it is significantly more!

EU

1,1 million people in the EU work in the arts an entertainment sectors in 2024.

Source: EU-LFS

27 % of the cultural enterprises in the EU were engaged in creative, arts and entertainment activities.

Source : Eurostat, 2022

Europe (EU and non-EU)

In 2022, over **2 million cultural enterprises** in the **EU** generated approximately **199 billion Euro** in **value added**, representing **2 %** of the total business economy. The majority of this value added was generated by **small and medium-sized enterprises** within the cultural sector.

In **2022**, the **cultural sector's net turnover** was approximately **503 billion Euro**, accounting for **1.3 %** of the total net turnover generated within the **EU's business economy**.

Source: Culture statistics - cultural enterprises - Statistics Explained - Eurostat

Worldwide

The live events industry is projected to expand from 653 billion US-Dollar in 2022 to 1,2 trillion US-Dollar by 2032, reflecting a compound annual growth rate (CAGR) of 5.9 %.

Source: Allied Market Research

Spain

The live music sector in Spain reached a record revenue of **over 570 million Euro in 2023**. This growth was primarily attributed to large-scale festivals and concerts by international artists.

Source: El País

The Netherlands

In 2024, music venues organized **20 906 events with live audiences**, during which 30 831 music performances were given by artists. In 2024, there were **6 885 354 audience visits to the music venues.** This represents an 8 % increase in audience compared to 2023.

Source: Dutch Music Venues and Festivals Facts and Figures 2024 (PDF)

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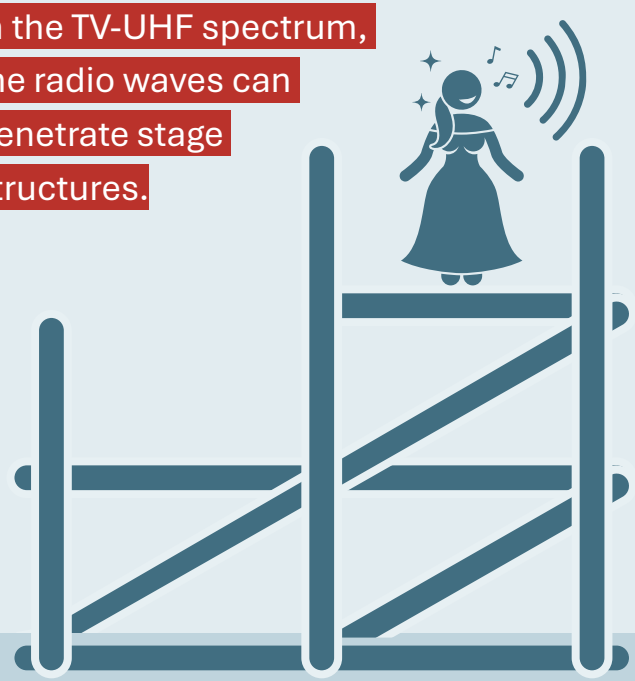
Lack of viable Alternatives

The TV-UHF spectrum remains irreplaceable for PMSE!

Thanks to the TV-UHF spectrum, microphones experience almost no disturbing interference during a performance.

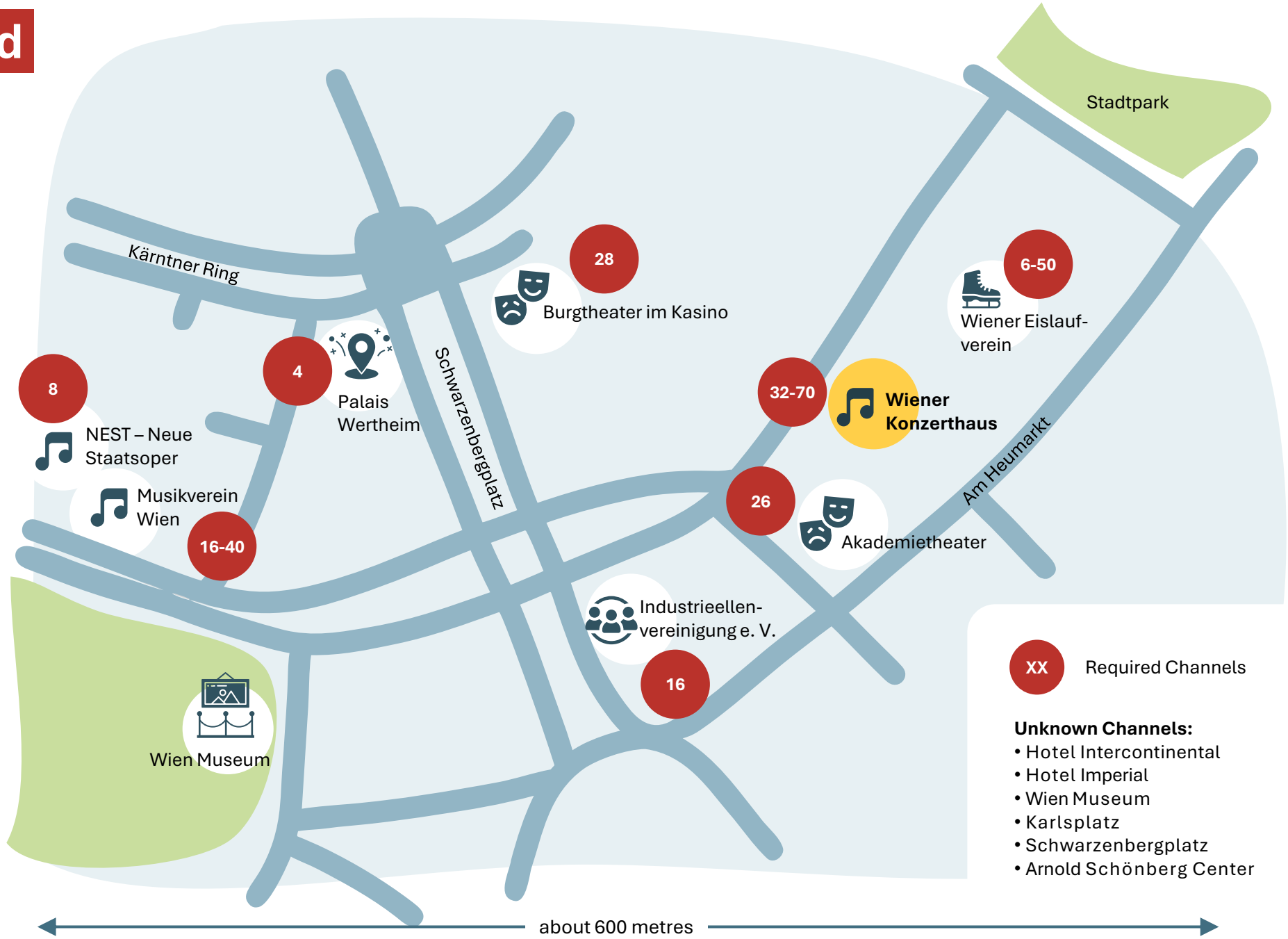
With TV-UHF spectrum, it is possible to tour Europe with your own sound equipment.

In the TV-UHF spectrum, the radio waves can penetrate stage structures.



Frequency demand for culture in 470 – 694 MHz

Daily spectrum need for PMSE in vicinity of the Konzerthaus in Vienna is between 136 and 242 wireless microphone channels

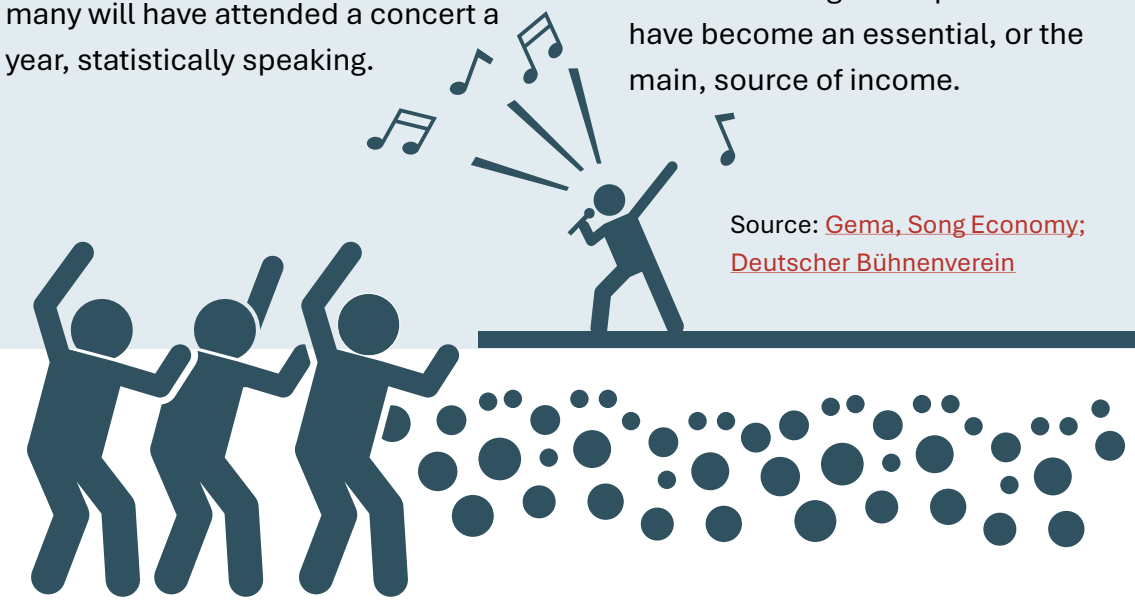


Frequency demand for culture in 470 – 694 MHz

70 million people attending concerts in Germany in 2024 - a new record

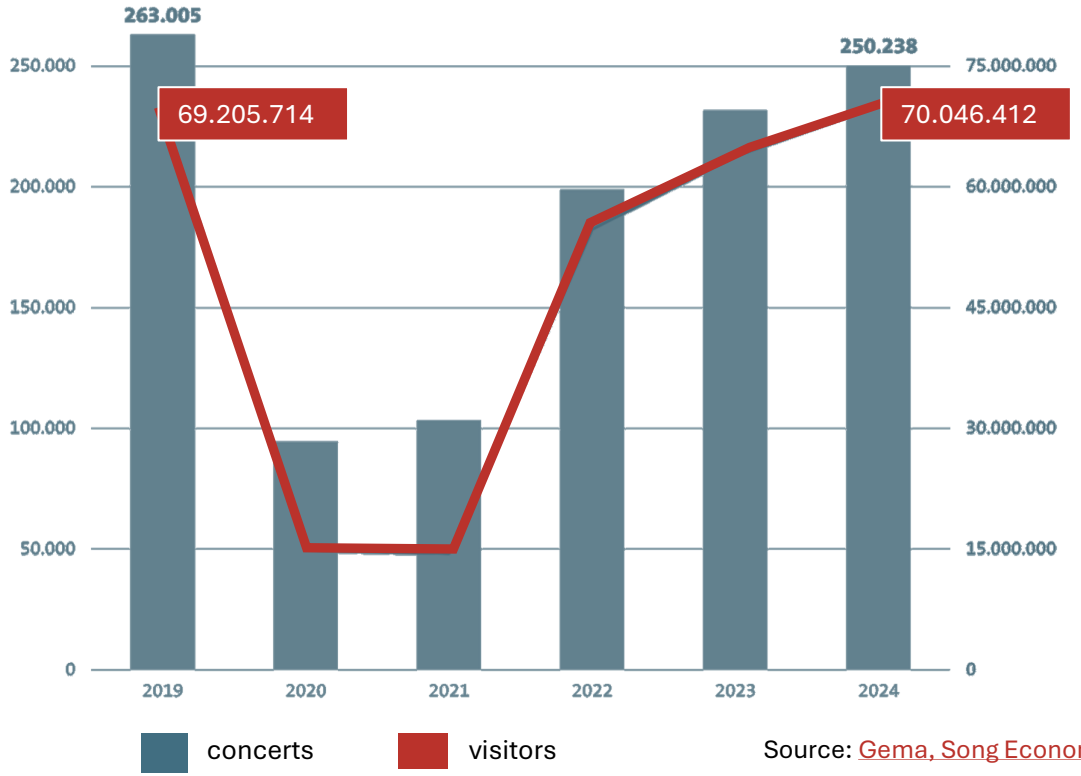
Soon, almost every person in Germany will have attended a concert a year, statistically speaking.

In other words, every citizen in Germany attended at least once in 2024 a concert or other performance. Total number of concerts (~250,000) is still slightly below pre-COVID levels but improving. In the past, big stars only went on tour every few years to promote new albums. Musicians hardly make revenues from sale of records or songs. Live performances have become an essential, or the main, source of income.



Source: Gema, Song Economy; Deutscher Bühnenverein

Concerts and visitors in Germany since 2019



Source: Gema, Song Economy

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Frequency demand for culture in 470 – 694 MHz

62 million people attending live performances in France in 2023

200,000 performances across the country, from small villages in the mountains to big cities. 2.1 billion euros revenues in Ticket sales, constituted a 17 % increase on 2022. Live concerts account for more than 50 % of total live performances.

Source: Ministère de la Culture France

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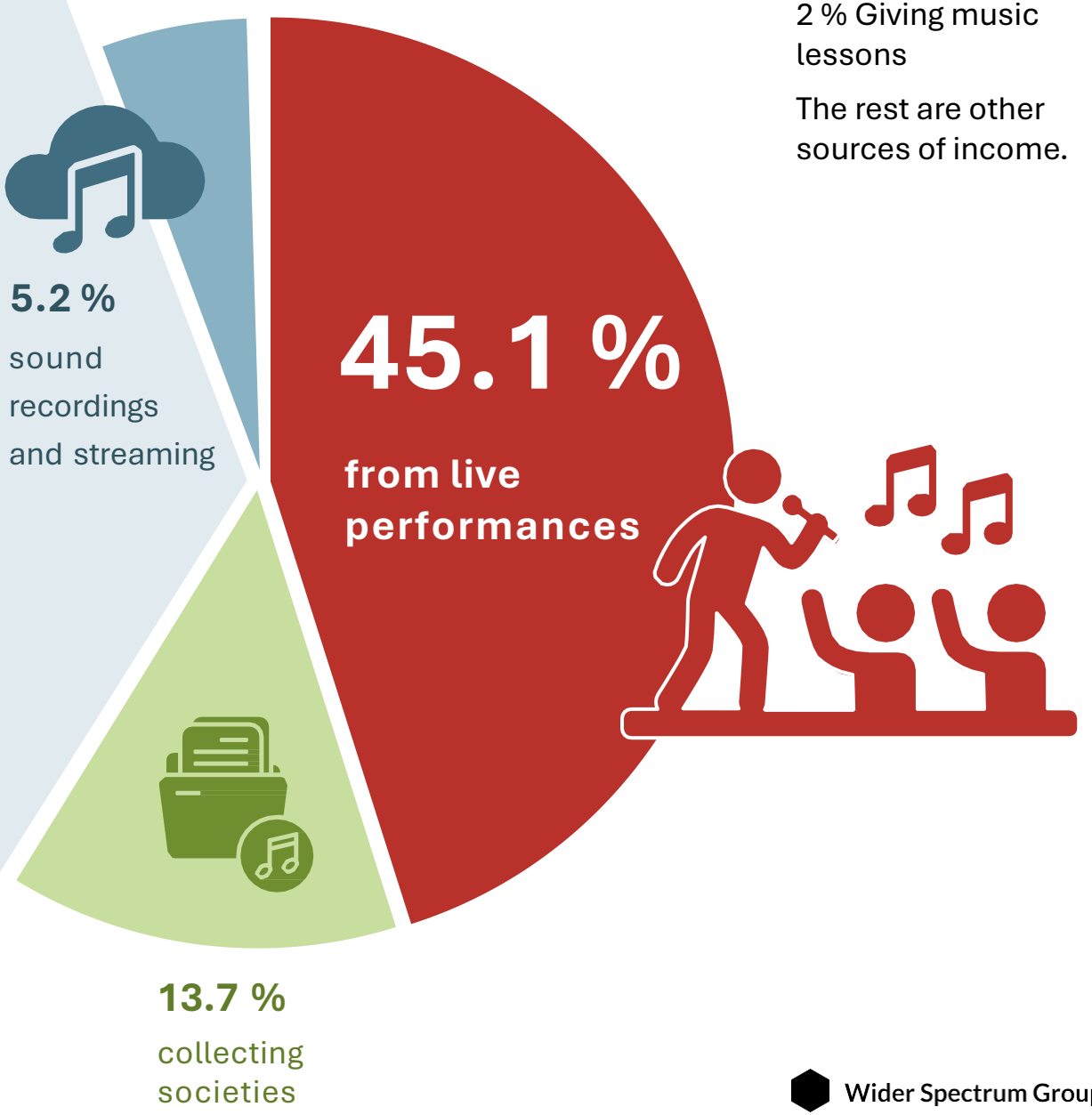
How do artists earn their money?

BDKV: „We have been experiencing strong market movements in the music industry for years. Especially with streaming and since CDs hardly promise any income anymore, live performances are the economic backbone and the great constant for artists. And thus help to ensure that new things can always be created and that our musical diversity inspires millions of people.“

Source: Oxford Economics, 2024



13 % Subsidies

2 % Giving music lessons

The rest are other sources of income.

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Jobs in Germany's live industry

67,000 employees

80 % of whom are permanent staff

1.6 billion euros

in wages and salaries for permanent employees

Source: Oxford Economics, 2024

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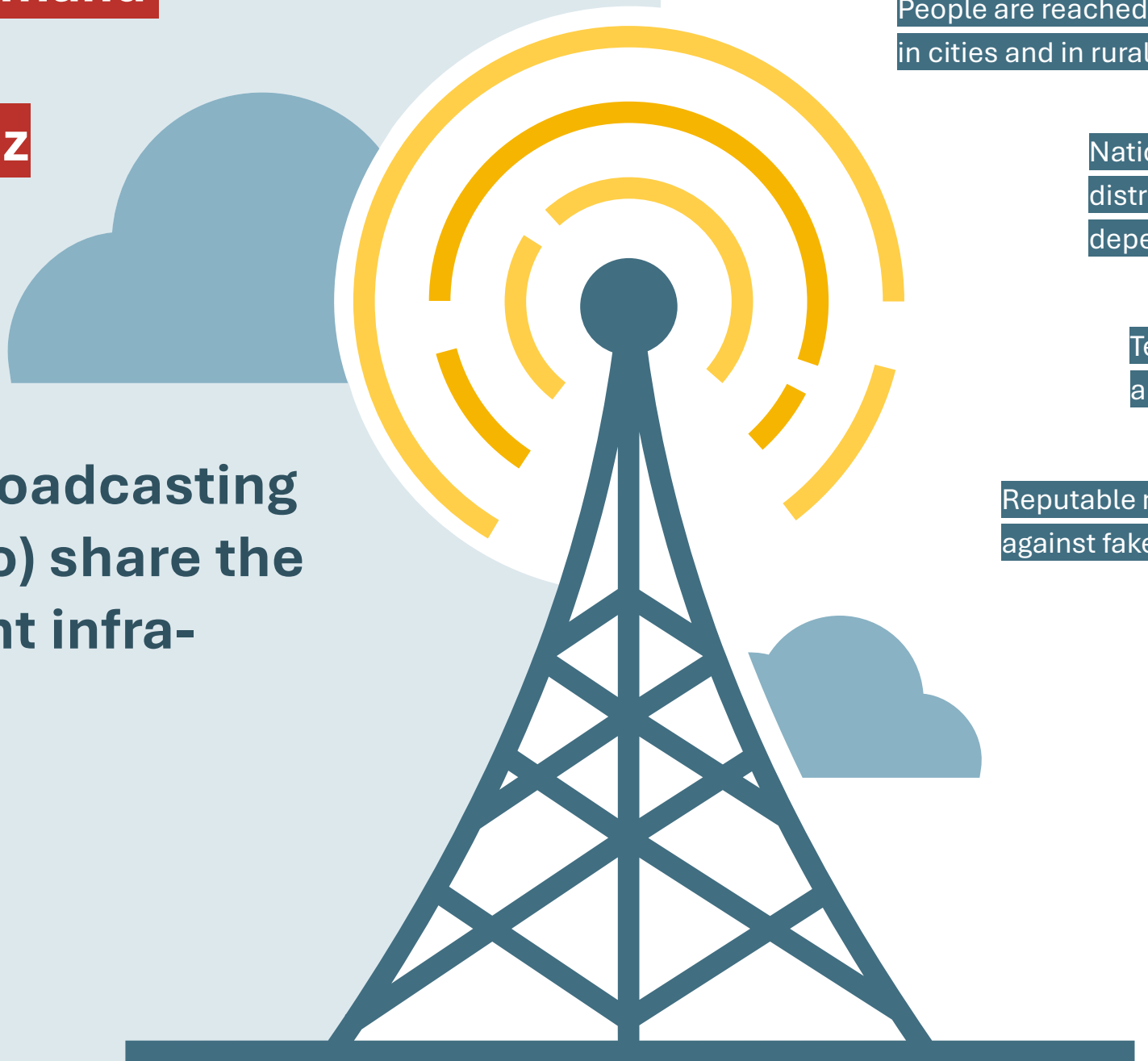

People are reached everywhere, in cities and in rural areas.

National sovereignty over distribution channels instead of dependencies on others

Terrestrial distribution is energy- and CO_2-efficient.

Reputable media as a bulwark against fake news and propaganda.

Terrestrial broadcasting (TV and Radio) share the same resilient infra-structure

Source for TV and radio as trusted media:
European Parliament: Media and News Survey 2023 (Nov. 2023)

Sources for sustainability:
LOCAT study (2021), OFCOM studies (2022 and 2024) and ARCOM/ARCEP/ADEME (2024, PDF)

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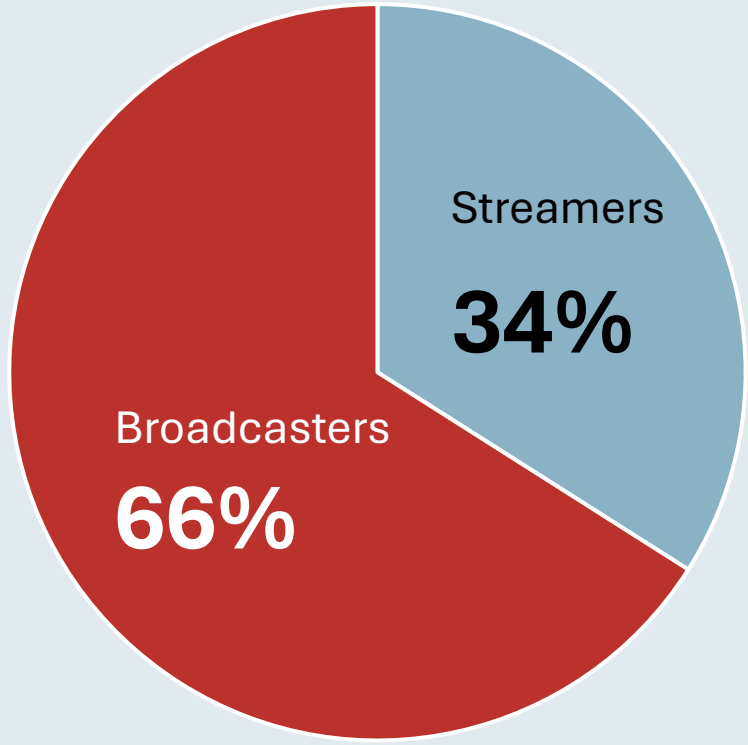
Broadcasters are the most important source of funding for European content

European broadcasters spent **over €16.7 billion** on original European content in 2024. In addition, European broadcasters invested **€27.8 billion** in acquired film and television rights, sports, and other content.

Streaming services spending has increased, yet is no substitute for broadcasters' spending.

Who finances original audiovisual content from Europe?



Source: European Audiovisual Observatory - Audiovisual services spending on original European content report, 2024 edition (PDF)

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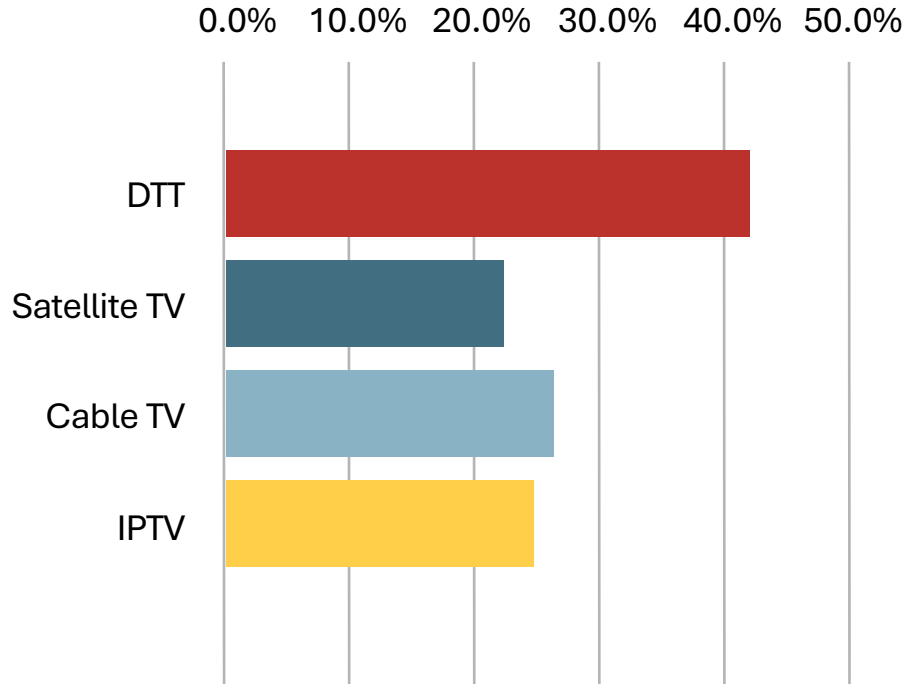
Digital terrestrial television (DTT) is the most popular platform for television broadcasting.

Near universal coverage

Free to air access

Present in 100M European households

TV penetration in % of TV households whether as the sole means of reception or alongside other platforms (27 EU countries)



Source: EBU at RSPG workshop, 2025 from BNE-EBU DPM data base 2024 and EBU 2024

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