

Press Release

FOR IMMEDIATE RELEASE

The UK Spectrum Policy Forum Publishes Strategic Vision for Future Use of UHF Spectrum Post-2034

[London, UK] 16 May 2025 – Coleago Consulting, in collaboration with its client, the UK Spectrum Policy Forum, has today released a landmark report, *“Future of the UHF Band After 2034,”* setting out a detailed assessment of the UK’s Ultra High Frequency (UHF) spectrum landscape.

The report looks at the industry trends and the critical trade-offs required to balance the needs of Digital Terrestrial Television (DTT), Mobile Communications, and Programme Making and Special Events (PMSE).

The UHF spectrum underpins vital services across the UK, with each sector delivering significant socio-economic value. As demand intensifies, the report finds that no single future scenario can satisfy all stakeholders, necessitating carefully balanced policy responses.

The report sets out the following key findings:

- Digital Terrestrial Television (DTT) continues to serve nearly half of UK households, with an estimated 3.3 million homes relying on DTT exclusively. Despite shifts toward online content, DTT remains essential for vulnerable populations. The report cautions that reducing DTT could deepen digital exclusion, particularly among the elderly and low-income households.
- Mobile Communications, which account for approximately 0.75% of UK Gross Value Added, face mounting demand for sub-1 GHz spectrum. Without additional allocations, network congestion and poor rural coverage may exacerbate digital inequality and hinder economic development.
- PMSE, a cornerstone of the UK’s creative sector (contributing over £124 billion in GVA), depends on UHF for high-quality wireless audio essential to live events and broadcast production. Its localised and predictable spectrum usage presents opportunities for dynamic sharing solutions.

The report models five future pathways for DTT beyond 2034, ranging from targeted upgrades and spectrum efficiency improvements to a full switch-off by 2035 in favour of IPTV. Each case is assessed for its technical feasibility, impact on PMSE, and implications for future mobile spectrum availability (IMT600 band). While Case 1 - retaining six multiplexes - is deemed unlikely, Cases 2 through 5 present viable options.

A key inflection point will be the BBC’s decision in 2026 regarding the renewal of its MUX-B licence. The report notes that broadcaster choices will play a significant role in shaping the trajectory of the DTT platform.

Policy Recommendations:

To minimise socio-economic disruption and optimise UHF spectrum usage, the report recommends:

- Spectrum Sharing: Develop robust dynamic sharing mechanisms between mobile and PMSE, particularly in rural areas.
- Infrastructure Investment: Expand affordable fixed broadband to reduce over-reliance on mobile networks.
- DTT Modernisation: Support technological upgrades and explore public funding options where DTT remains in use.
- International Coordination: Align UK policy with European spectrum plans to ensure interoperability and cost efficiency.

Finally, the report highlights that, if auctioned, the IMT600 band could raise up to £980 million for the exchequer, with substantial potential gains in consumer welfare. Addressing digital poverty through improved connectivity could contribute billions annually to the UK economy.

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Notes to Editors

[UK Spectrum Policy Forum website](#)

About Coleago Consulting:

Coleago Consulting is a global telecommunications strategy firm specialising in spectrum, network economics, and regulatory policy. The *Future of the UHF Band After 2034* report aims to support informed, evidence-based policy development for the UK's evolving digital infrastructure needs.

About UK Spectrum Forum

Set up at the request of government and Ofcom the Spectrum Policy Forum (SPF) act as a pro-active industry-led 'sounding board' to UK Government and Ofcom on future policy and approaches on spectrum and a cross-industry 'agent' for promoting the role of spectrum in society and the maximisation of its economic and social value to the UK. We do this by exchanging news and views on developments in using spectrum, drawing on our industry expertise from around the world.

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