

TV White Space Industry Set to Accelerate from 2014

2014 will be a defining year for the emergent TV white space industry, a major study by global spectrum management specialist PolicyTracker (<http://www.policytracker.com>) has concluded. The sector feels that regulation not technology is its main barrier to success, according to an exclusive survey carried out for the report.

September 13, 2012 (FPRC) -- Over the next two years, a number of major technology standardisation efforts will reach completion, allowing standards-based white space devices (WSDs) to come onto the market in volume. In parallel, TV white space rule-making will start to snowball, as regulators align behind using geolocation databases to control the use of white space spectrum. These developments will spur the emergence of a vibrant, global white space industry.

'Technology is not the main barrier to progressing with TV white spaces,' according to Catherine Viola, the author of *Developing a Global Ecosystem for TV White Spaces*. 'We've seen from trials in the United States (US) and the United Kingdom (UK) that the technological approaches being developed today offer a viable way forward for using white spaces – the pockets of spectrum unused by digital TV broadcasting – without causing harmful interference to TV service and other existing band users.'

The completion of technology standards will drive the mass adoption of TV white space solutions, adds Viola. There is already a base standard for rural broadband access using white spaces (IEEE 802.22), and other standards addressing applications such as long-range WiFi-type hotspots (IEEE 802.11af) and machine-to-machine communications (Weightless) are being developed.

Within the next two years, much of the ongoing standardisation work will be completed. 'Stable standards will pave the way for technology suppliers to introduce white space solutions suitable for mass deployment. We expect standards-based chipsets, radio equipment, and terminals to become available in volume from around 2013–2014 onwards,' continues Viola.

In parallel with technology advancements, PolicyTracker expects the pace of white space regulation to accelerate over the next two to three years, and a harmonised, multi-regional regulatory approach to TV white spaces to emerge.

'So far, the US and the UK have led the way with white space rule-making,' says Viola, 'and few other countries are moving towards suitable regulatory frameworks.' This is set to change, Viola explains. 'There is a growing consensus on using geolocation databases to control access to white space spectrum by WSDs, and this is beginning to act as a catalyst for white space rule-making. As regulators start to align behind geolocation, we expect white space regulation to cascade around the world. Countries of the Asia-Pacific region such as Singapore and Korea will be among the early movers.'

2014 could mark a watershed in the evolution of the TVWS industry, Viola believes. 'If technology and regulation come together as we envisage over the next two to three years, the market could really accelerate from then.'

But enduring concerns from incumbent TV band users – broadcasters, programme-making and special events (PMSE), and radio astronomy – will need to be addressed if the TV white space industry is to flourish. 'Not all TV band users are yet convinced that their services will be adequately protected from harmful interference,' says Viola. 'Regulators and industry stakeholders will need to work together to overcome their outstanding concerns. Only then will it be possible for the TV white space industry to fully prosper.'

Developing a Global Ecosystem for TV White Spaces evaluates the status of the emerging TV white spaces industry, assessing developments in regulation, technologies, trials, and applications. Based on a comprehensive industry survey, the 90-page report explores what remains to be done for a global TV white spaces ecosystem to emerge. It is available for download here:<http://www.policytracker.com/TVWS>

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For more information and interviews contact:

Kate Milligan, PolicyTracker, +44 (0)207 100 2875 kate@policytracker.com

About PolicyTracker

PolicyTracker's mission is to explore the latest debates in spectrum management and policy. Eight years ago we started the only newsletter devoted to the subject and have gone on to produce highly regarded training courses and conferences featuring acknowledged international experts. We also offer informational services such as research reports and the Global Spectrum Database. See <http://www.policytracker.com>

Definitions

TV white spaces – portions of spectrum in the UHF TV bands (470 to 698 MHz or 790 MHz, depending on the region) that are not being used for digital terrestrial TV (DTT) broadcasting service.

White space devices (WSDs) – radio systems and terminal devices designed for operation in TVWS and incorporating technologies that enable them to identify vacant channels (directly or indirectly) and operate without causing harmful interference to existing TV band users.

Geolocation database – a database which calculates TVWS availability, based on propagation models for DTT transmission, information on the channels permanently or temporarily set aside for other authorised services such as radio astronomy or programme-making and special events (PMSE), and algorithms defining the protection parameters for these existing TV band users. The databases return a list of vacant TVWS channels to WSDs when requested.

Contact Information

For more information contact Kate Milligan of POLicyTracker (<http://www.policytracker.com>)
+44 207 100 2875

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