Policy & regulatory status: towards new frameworks

European Commission perspective

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*The views expressed in this presentation are those of the author and do not necessarily reflect the official position of the Commission*
Scene setter

• Importance and potential of satellite connectivity
  • European Commission’s White Paper (21 February 2024): How to master Europe's digital infrastructure needs? – feedback until 30 June 2024
  • Review of the EU regulatory framework for Mobile Satellite Services (MSS) in 2 GHz band beyond 2027:
    • Opinion of the high-level advisory Radio Spectrum Policy Group (RSPG) opinion
    • ongoing MSS study commissioned by the European Commission
  • D2D connectivity: challenges and opportunities
**White Paper**

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<th>Connectivity to all</th>
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<td>“[…] satellite broadband can bring broadband services with up to 100 Mbps download speeds to very rural and remote areas, where no very high-capacity networks are available, even if affordability remains crucial to facilitate take-up in these areas. They can also provide resilient emergency services in disaster or crisis situations. However, while satellite services can bridge the digital divide, they cannot currently replace the performance of ground-based networks.”</td>
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<td>“Beyond terrestrial connectivity, further investments are required for the integration of advanced satellite services providing complementary solutions for backhaul, device connectivity in remote areas not covered by terrestrial technologies or to ensure service continuity in case of crisis or disaster relief.”</td>
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<th>Authorisation framework</th>
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<td>“[…] it is imperative that spectrum is managed in a more coordinated way among all Member States to maximise its social and economic value and enhance terrestrial and satellite connectivity across the entire EU.”</td>
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<td>“Furthermore, coverage of wireless networks, such as satellite networks, can extend beyond national – and even EU – borders. While there are still clear benefits in keeping the implementation of authorisation regimes at national level, in particular for local access and retail services, assigning radio spectrum under conditions which differ between Member States may not always be the most efficient approach, in particular for satellite communications. There could therefore be an economic and technical justification for a more European approach.”</td>
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<td>“[…] in particular the fast development of the satellite sector and its cross-border nature invite new reflections regarding enhanced or common licensing regimes (even EU-level selection and authorisation, if appropriate).“</td>
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<td>“rapidly developing satellite communications, ensuring secure government and commercial applications, including direct-to-device satellite connectivity, using spectrum allocated for mobile satellite and, if appropriate, terrestrial services.”</td>
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<th>Global leadership</th>
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<td>“The objective is not only to ensure that the EU remains among the global leaders in communications systems, but also to achieve leadership in the development of new capabilities in related areas such as […] non-terrestrial connectivity, […].”</td>
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Review of the MSS regulatory framework in 2 GHz band beyond 2027 (1/2)

MSS framework

- The 2 GHz MSS Band (1980-2010 MHz and 2170-2200 MHz) was EU harmonised in 2007 (MSS Harmonisation Decision 2007/98/EC)

- A common EU selection procedure was established in 2008 (MSS Decision No 626/2008/EC)

- European Commission selected two 2 GHz MSS operators in 2009 for 18 years (MSS Selection Decision 2009/449/EC)

- Member States either issued general authorisations or granted individual rights

- The MSS national authorisations expire in May 2027
Review of the MSS regulatory framework in 2 GHz band beyond 2027 (2/2)

Review: RSPG opinion and ongoing MSS study

**RSPG opinion (7 February 2024)**

- to **avoid fragmentation in the internal market**, the Commission and Member States should reach, **by the end of Q2/2025**, a sufficient understanding on a future band usage and segmentation scenario, as well as next procedural steps
- a balance between **business continuity and innovation** has to be taken into consideration
- a **continuity scenario** (same band segmentation between two operators) may **limit competition and innovation**
- technology neutrality should be maintained

**Four potential use cases**
- EAN/CGC
- generic MSS individual voice/data
- M2M / IoT
- D2C/D2D

**Four segmentation scenarios**
- 2 operators
  - 2x15 MHz and 2x15 MHz
- More than 3 operators
  - 2x10 MHz, 2x10 MHz, 2x5 MHz, (shared) 2x5 MHz
- 3 operators
  - 2x10 MHz, 2x10 MHz, 2x10 MHz
- 3 or more operators
  - 2x15 MHz, 2x10 MHz, 2x5 MHz
  - or
  - 2x15 MHz, 2x10 MHz, (shared) 2x5 MHz

**Ongoing MSS study (results expected in Q4/2024)**

- **assess** the implementing of the current 2 GHz MSS authorisations
- provide an **overview of the developments and trends** on the satellite connectivity market, and
- **develop possible usage scenarios** for the period after May 2027

External workshop on the interim study report – (tbc) June 2024
D2D connectivity: coordinated EU policy approach

• **Opportunities:**
  
  • Supporting innovation, creating commercial opportunities, enabling new applications/services, stimulating competition
  
  • EU policy priorities: safeguarding EU sovereignty, promoting EU interests, achieving 2030 Digital Decade targets, fostering the development of the internal market

• **Challenges:**
  
  • Creating technology inclusive regulatory frameworks
  
  • EU roaming
  
  • Technical viewpoint: integration of SatCom into radio access Electronic Communication Services, handover between NTN and MFCN
  
  • Spectrum:
    
    • Sufficient spectrum
    
    • Regulatory uncertainty: current ITU and EU framework, national authorisations, need for coordination and technical harmonisation across EU
    
    • Potential interference, including cross-border, issues and possible mitigation measures
Thank you