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CASE STUDY

TV Spectrum Repack

Landscape

A group of U.S. television broadcasters are preparing for the TV Spectrum Repack. At the end of the Federal Communications Commission (FCC) spectrum incentive auction, hundreds of television stations will migrate from current channel assignments to new ones.

The FCC released broadcaster rules for the Spectrum Repack. These rules outline the amount of time broadcasters have to make the transition to new channels, as well as the amount of money collectively available to reimburse stations for transition costs. The FCC set the industry-wide time limit at 39 months and the fund for reimbursable expenses at \$1.75 billion. The FCC rules also state that stations that have not moved to new assigned channels within 39 months will be required to cease their TV transmissions.

Key Business Issues and Challenges

As an advocate for U.S. television broadcasters, the group is concerned that the amount of time and money allotted is significantly inadequate for an industry-wide transition of hundreds of stations—particularly at a time when industry resources are greatly diminished. No entity has produced a study that accounts for the likely number of stations to move to new channels, not to mention an analysis of the required tasks, time and costs to perform the industry-wide transition.

DTC Customized Solution

To address the information gap, DTC produced a detailed study that estimates the necessary time and money to accomplish the repacking of 800-1,200 stations once the FCC designates new channel assignments.

The study includes the following:

- **Analysis of FCC simulations** designed to plan for new spectrum plans post-incentive auction; Analysis includes DTC's estimate of the number of stations required to change channels, based on a 120 MHz clearing target and an 84 MHz clearing target
- **Engineering analysis of the requirements for different types of stations** (differences based on types of transmission antennas, RF systems, transmitters, conditions of towers, etc.)

- **Historical analysis of the U.S. analog-to-digital TV transition**, including resources available at that time, post-transition attrition among service and equipment suppliers, and how attrition or industry consolidation may impact the Spectrum Repack
- **Census and analysis of current availability** of the following resources:
 - RF consulting engineers
 - Tower structural engineers
 - Legal services
 - Antenna and RF component manufacturers
 - Transmitter manufacturers
 - Antenna installers and tower modifiers
- **Development of interdependent timeline**, detailing the estimated time for 800-1,200 stations to move to new channel assignments simultaneously
- **Development of a list of equipment and third-party service provider costs** calculated by five types of stations and the percentage of stations that fall under each of these types
- **Production of a detailed line-item cost analysis for each station type**, yielding an industry-wide estimated cost for Spectrum Repack

Client Benefit

The result is a detailed quantification of time and funds required for an industry-wide Spectrum Repack that fell significantly short of the amount of time and money the FCC has allotted for the program. The group has used the study to encourage the FCC and policy makers in the U.S. Congress to modify the deadline and the reimbursement fund.

ABOUT DTC

Since 1997, the global DTC research team is highly sought after for both the depth of knowledge and practical know-how it brings to the industry. From the United States to Europe and Asia, DTC analysts travel the world to bring clients the most up-to-date intelligence on consumer digital markets, making the company one of the most trusted industry resources for its extensive expertise and experience.