

# TECHNOLOGY FACT SHEET

## AVAILABILITY OF PSB PROGRAMMES ON TV DISTRIBUTION PLATFORMS

Different countries have different TV distribution markets: some countries have higher satellite or cable penetration than Digital Terrestrial Television (DTT). This document shows that although alternative distribution platforms for linear television exist they cannot replace DTT. There are 8 factors we should take into account. Let's not forget that, in most countries, DTT is essential for Public Service Broadcasting (PSB) services because it is the only free-to-air (FTA) platform.

### 1. PROVISION OF FREE-TO-AIR SERVICES ON ALTERNATIVE PLATFORMS

In many countries, DTT is the only distribution platform offering FTA television services. Table 1 in the Annex shows the current availability of PSB distribution platforms in 26 European countries. All alternatives to FTA are either only available to subscribers as part of a paid package or via "Free to View" access cards.

Subscriptions clearly represent a hurdle to those who cannot afford, or do not wish to pay for, a commercial package (whether just TV, or a combination package including broadband or triple play). The use of access cards represents an extra burden and costs on either broadcasters or platform providers, i.e. to manage databases of eligible households, handle the cards, and provide user support. Experience shows that platform operators whose core proposition is to provide pay-TV packages are reluctant to provide Free-to-View cards and the corresponding user equipment.

### 2. PROVISION OF PSB SERVICES ON ALTERNATIVE PLATFORMS

In some countries, public-service broadcasters' content is available on DTT, but not necessarily on any or all alternative platforms, for technical, regulatory and commercial reasons. Unless these reasons are addressed the alternative platforms cannot replace DTT for provision of PSB services.

### 3. PROVISION OF LOCAL AND REGIONAL TV SERVICES

DTT is convenient for the provision of local TV services as the network coverage can be adjusted to the regulatory and commercial requirements.

In many countries local TV services are only available on DTT and it may not be viable to provide them on other platforms, in particular, where alternative platforms are not available or where the costs would be prohibitive.

### 4. PROVISION OF COMPLEMENTARY COMMERCIAL PROGRAMMES

In addition to PSB services on the DTT platform, there is generally a wide range of non-PSB content available to complement the PSBs. These services are highly-valued by their viewers and add a significant value to the DTT platform. For many commercial services, the DTT platform constitutes the preferred means of distribution under given technical, regulatory and economic conditions.

### 5. LACK OF "UNIVERSAL" AVAILABILITY

In addition to PSB services on the DTT platform, there is generally a wide range of non-PSB content available to complement the PSBs. These services are highly-valued by their viewers and add a significant value to the DTT platform. For many commercial services, the DTT platform constitutes the preferred means of distribution under given technical, regulatory and economic conditions.

## **6. COMPETITION BETWEEN TV DISTRIBUTION PLATFORMS**

The existence of DTT in a given country is important - even in those countries where satellite or cable are the main delivery platforms - because it provides a competitive alternative for the benefit of viewers. If DTT was not available, viewers would have to move to satellite, cable or IPTV platforms which, in many countries, would require a subscription to a pay package. In addition, in many places only one of these options (e.g. satellite) would be available.

## **7. LEGAL REQUIREMENTS REGARDING NATIONAL PROVISION OF INFRASTRUCTURE**

In some countries, there is a legal requirement for critical infrastructure, including PSB transmission facilities, to operate independently of foreign-owned companies, including satellite providers or even GPS signals. Furthermore, some DTT networks are considered to be part of "public safety" infrastructure to provide local information to population in case of emergency.

## **8. MIGRATION OF DTT AUDIENCES TO ANOTHER PLATFORM**

In countries where a significant part of the population relies on the DTT platform migration to alternative platforms would require large investments, either borne by individual households or governments. The latter may be impossible due to platform neutrality considerations.

## **WHAT CAN BE DONE?**

It is crucial that the message to regulators is that other platforms cannot easily replace DTT and that in most countries DTT is essential for PSB services because it is the only FTA platform. Broadcasters should get involved in their country's discussions on the future of DTT and brief their national regulators. The EBU can provide additional briefing documents with up-to-date information ahead of their preparatory meetings.

## **WHO SHOULD YOU CONTACT FOR ASSISTANCE?**

Before your next meeting with your national regulator, please contact Elena Puigrefagut (puigrefagut@ebu.ch), Walid Sami (sami@ebu.ch) or Darko Ratkaj (ratkaj@ebu.ch) to obtain the latest supporting documentation from the EBU.

## **HOW CAN YOU GET INVOLVED IN EBU'S WORK?**

To follow our work on Spectrum Management and Regulation, you can login to the EBU Technology & Innovation website and join the SMR group here: [tech.ebu.ch/groups/smr](http://tech.ebu.ch/groups/smr)

All EBU members can join any one of the strategic programmes or project groups dealing with spectrum (SMR, SMR-SDB, SMR-BNP, FDS, CTN-Mobile).

## ANNEX

**Table 1: Availability of PSB programmes on TV distribution platforms**

Free-to-air (FTA) refers to a delivery model where PSB services are available to all viewers and listeners without recurring charges.

Country	DTT	Satellite	Cable	IPTV	Comments
Austria	FTA	PSB services are encrypted for content rights reasons. Free-to-view possible with access cards.	No FTA	No FTA	
Belgium	FTA	No FTA	Subscription is required. The generalist PSBs are "must carry" and available in all pay packages	No FTA	A joint programme between VRT and the Dutch NPO, called BVN (het Beste van Vlaanderen en Nederland) is FTA on satellite. The channel is satellite-only, not available on any other platform.
Bulgaria	FTA	No FTA. Only the International channel is FTA.	No FTA	No FTA	
Croatia	FTA	No FTA. PSB programme is encrypted and available with subscription.	Not available.	No FTA	
Czech Republic	FTA	No FTA, PSB services are encrypted, subject to a small subscription fee	Some programmes FTA	Some programmes FTA	
Denmark	FTA	No FTA. No 'must carry' rules. Encrypted services include PSB, but they are only available with subscription.	Limited 'must carry' rules, operator entitled to charge, no regulation of price for viewers	No FTA, no 'must carry' rules, operator entitled to charge	Satellite FTA not possible due to rights issues. Cable, satellite and IPTV are all re-distribution, i.e. performed by another entity other than the PSB.
Estonia	FTA	No FTA	No FTA	No FTA	
Finland	FTA	No FTA service available, but exceptionally (outside DTT areas) access cards are made available. Not all regional PSB variants available.	Must Carry. CTV-ops are allowed to charge technical service fee ~€5/month. Re-transmission of DTT.	Re-transmission of DTT. Legal 'must carry' status unclear, IPTV-ops consider 'must carry' exists	Market shares approx. - DTT & CTV both ≈40% - IPTV≈10% - DTH <10%
France	FTA	PSB services are encrypted for rights reasons, but with either free or one off-payment for viewing card. Not all sub-local services are available	'Must carry', minimum subscription €28/pm for triple play (no extra charge for DTT channels). <75% of HH have access. Not all sub-local services are available.	'Must carry', minimum subscription €30/pm for triple play (no extra charge for DTT channels). Not all sub-local services available.	'Must carry' is free for PSBs. Cable & IPTV carriage must be on FRAND basis for commercial FTA DTT broadcasters
Georgia	FTA	FTA	No FTA	No FTA	No DTT. Analogue terrestrial
Germany	FTA	FTA	Subscription required (for single family at least 17 € per month), depending on local CATV operator – may be less for a flat in an apartment block.	Subscription required (normally bundled with Internet and phone connection, from about 39 € per month).	HDTV by satellite is FTA for PSBs.
Hungary	FTA	No FTA. PSB services are encrypted, viewers must obtain a viewing card.	No FTA	No FTA	

Country	DTT	Satellite	Cable	IPTV	Comments
Iceland	FTA	PSB services are encrypted for rights reasons, but with one-off payment for viewing card. Local services are available	Not available	PSB included in a TV package bundled with Internet connection and STB lease	The future of satellite distribution is unclear.
Ireland	FTA	FTA (on Ka Band spot beam) and via subscription on Ku Band.	'Must carry' - Subscription required	'Must carry' – Subscription required.	
Italy	FTA	FTA. Encrypted for rights reasons, but with one-off payment for viewing card.	N/A	<1% use	
Latvia	FTA	No FTA	No FTA	No FTA	
Netherlands	FTA	PSB encrypted with one-off payment for viewing card. This service will terminate in August 2014. After that date PSB will be available only within pay-TV packages.	Subscription is required. The generalist PSBs are 'must carry' and available in all pay packages	Subscription is required. The generalist PSBs are 'must carry' and available in all pay packages	According to the Dutch Media law the PSB channels (as well as the Flemish channel 1 and 2) are 'must carry' for every distributor with 100.000 subscribers or more, and in every available subscription package. The number of PSB channels and the quality differ per platform. On DTT there are 3 generalist TV channels in SD, on satellite the same channels are in HD and SD + 4 thematic channels in SD. On cable the 3 main TV channels (analogue, SD and HD digital) and 8 thematic channels (but only 1 in the basic package, 7 in plus packages). On IPTV the 3 main TV channels (SD and HD) and 8 thematic TV channels). A joint programme between VRT and the Dutch NPO, called BVN (het Beste van Vlaanderen en Nederland) is FTA on satellite. The channel is satellite-only, not available on any other platform.
Norway	FTA	Encrypted. Available outside DTT coverage areas with free access card. Not available in many areas where reception is blocked by the terrain.	Must carry. Operator entitled to charge. Not available in many rural areas.	Must carry. Operator entitled to charge. Not available in many rural areas.	An extra DTT network is deployed in rural areas where satellite distribution is blocked by the terrain(590 transmitters; PSB only)
Poland	FTA	TVP's own platform on Astra 1Kr: encrypted/FTA depending on the programme. Third parties platforms: selected programmes – FTA / 'must-carry' obligation, some programmes might be encrypted.	Third parties' networks: some programmes FTA under must-carry obligation / some encrypted.	Selected programmes only.	9 (of 14) programmes distributed via DTT.

Country	DTT	Satellite	Cable	IPTV	Comments
Portugal	FTA	PSB encrypted with one-off payment for viewing card.	No FTA	No FTA	Only two PSB programmes are FTA in DTT together with two commercials channels and the Parliament channel. Outside the DTT coverage area, one can buy (at special price) a satellite receiver kit, to receive from Hispasat the same content as in DTT. In Cable and IPTV there is no FTA, you must always pay. But if you are living in an historical area, where you are not allowed to put antennas on the roof, then the cable operators are (by law) obliged to give you the 5 basic channels.
Serbia	FTA	No FTA	No FTA	No FTA	
Slovakia	FTA	PSB encrypted for geo-blocking (rights) reasons, subscription or so-called services charges min. €1,20/pm (CZE and SVK programmes).	'Must carry' subscription approx. €10/pm (relating to the base package of programmes). Generally not available in the rural areas.	'Must carry', subscription (usual depend on the TV programme + internet package) or/and an activation fee. Availability of service depend on local internet infrastructure.	
Spain	FTA	PSB encrypted, two main PSB programmes included in pay-TV packages.	No FTA, two main PSB programmes included in pay-TV packages.	No FTA, PSB encrypted, two main PSB programmes included in the pay-TV packages.	Satellite used to provide services where there is no DTT coverage. In these areas, satellite decoder is provided free of charge.
Sweden	FTA	No FTA service	'Must carry', but charged	'Must carry', but charged.	
Switzerland	FTA	PSB encrypted and limited to the Swiss audience with one-off payment for viewing card.	Minimum subscription required.	Subscription required (normally bundled with Internet and phone connection).	
UK	FTA	FTA	Minimum subscription £13/pm.	Subscription required.	DCable has a 'must carry' for public service channels. All platforms also have pay options. In particular, DSat from Sky is very popular with an entry pricing of £21.50 a month. IPTV has FTA through YouView, but most choose a subscription package.