

AVAILABILITY OF EUROPEAN PSM SERVICES ON TV DISTRIBUTION PLATFORMS

In most countries, DTT is essential for Public Service Media (PSM) services as it is often the only Free-to-air¹ (FTA) platform, even if in some countries, penetration of satellite or cable is similar or higher.

This document provides information on the availability and use of alternative distribution platforms for PSM services. This includes Free-to-view² (FTV) and access to PSM via the open internet. Although in many countries these alternatives exist and can complement DTT, currently, they cannot replace DTT in all countries.

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 Annex³ shows the current availability of PSM distribution platforms in 22 European countries. All alternatives to FTA are either only available to subscribers as part of a paid package, via “Free to View” access cards or via an internet or mobile subscription.

Subscriptions clearly represent a hurdle to those who cannot afford, or do not wish to pay for, a commercial package (whether just TV, an internet connection or a combination package including both or triple play (incl. mobile subscription)).

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 PSM SERVICES ON ALTERNATIVE PLATFORMS

In some countries, public-service broadcasters’ content is available on DTT, but not 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 PSM services in these countries.

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 on cable or satellite platforms.

¹ Free-To-Air (FTA) means that radio- or television content is distributed without any form of encryption and is available to the audience free of charge beyond an obligatory licence fee and costs due to the acquisition of receiving devices. See Factsheet on [‘Relevance of Free-to-Air distribution for Public Service Media \(PSM\)’](#).

² Free-to-view (FTV) means that radio- or television content is distributed with some form of encryption. This requires a conditional access system to decrypt the signal. Apart from a one-time fee for unlocking reception or acquisition of a smartcard to gain access to the content FTV reception is free of charge in the same way as FTA. See Factsheet on [‘Relevance of Free-to-Air distribution for Public Service Media \(PSM\)’](#).

³ The data provided in the Table reflects the information collected from EBU Members as of May 2019.

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4. PROVISION OF COMPLEMENTARY COMMERCIAL PROGRAMMES

In addition to PSM services on the DTT platform, there is generally a wide range of non-PSM content available to complement the PSMs. These services are highly-valued by their viewers and add a significant value to the DTT platform. In some countries the DTT platform constitutes the preferred means of distribution for commercial services.

5. LACK OF “UNIVERSAL” AVAILABILITY

In many countries, there is a legal or licensing requirement for DTT to be available to a large proportion of the population. Not all alternative platforms can offer this. In particular, cable networks and IP TV are often still not available in many rural areas (due to high deployment costs). The use of OTT internet to access PSM services is slowly growing via fixed or mobile broadband networks. However, coverage of both fixed and mobile IP networks are not normally universal and can have QoS issues.

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, IPTV platforms or open internet which in many countries would require 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 PSM 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 difficult due to platform neutrality considerations.

9. OPEN INTERNET AS AN ALTERNATIVE TO DTT

All PSMs in the countries in the annex are providing a free service on the internet for accessing their content. These services are often seen as an additional service to the primary linear service in each country, where the viewer can also catch up through VoD-content. For the open internet to be an alternative platform it must provide the same QoS as DTT – especially at peak viewing events such as the football World Cup and the Olympics. It must also provide the same level of redundancy and resilience as DTT infrastructure.

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 PSM services because it is the only free-to-air 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.

WHO SHOULD YOU CONTACT FOR ADDITIONAL INFORMATION?

Please contact Elena Puigrefagut (puigrefagut@ebu.ch) and Walid Sami (sami@ebu.ch) to obtain the latest supporting documentation from the EBU.

HOW CAN YOU GET INVOLVED IN EBU'S WORK?

For more information on how to get involved in the EBU's work on Spectrum and Distribution go to the EBU's Technology & Innovation website: tech.ebu.ch/groups/sm, tech.ebu.ch/distribution and tech.ebu.ch/dtt.

ANNEX

Table 1: Availability of European PSM services on TV Distribution Platforms⁴

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
Austria/ ORF	PSM services in HD are encrypted for content rights reasons. FTV possible with access cards or card-less system.	PSM services in SD and HD are encrypted for content rights reasons. FTV possible with access cards.	Subscribed Services with must carry solution for PSM (mostly encrypted).	Subscribed Services with must carry solution for PSM (mostly encrypted).	Linear channels and on-demand programmes are available via ORFtvThek. Geo-blocking for some content – subscription service available for some content.	
Belgium/ RTBF VRT	Flanders: Subscription is required. The PSMs are "must carry" and available in a pay package. Wallonia: FTA	Subscription is required. The PSMs are "must carry" and available in all pay packages.	Subscription is required. The PSMs are "must carry" and available in all pay packages.	Subscription is required. The PSMs are "must carry" and available in all pay packages.	All live and most "on-demand" programs are available free of charge, but after registration.	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. RTBF is a member of TV5MONDE and therefore provides contents through this FTA channel.

⁴ The data provided in the Table reflects the information collected from EBU Members as of May 2019.

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
Croatia/ HRT	FTA	No FTA. PSM programmes are encrypted (access card is required) and available FTV.	No FTA.	No FTA	All linear channels and on-demand programmes are available via an app. Registration and login are required but there are no additional charges for the content. The viewers pay for the internet access.	Cable and IPTV are operated by commercial network operators that offer only subscription-based services.
Denmark/ DR	FTA	No FTA. No must carry rules. Encrypted services include PSM, 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.	All channels "FTA", both live and on demand services. Geo-blocking used for all live services but for only 5-10% of on demand (on demand catalogue is mostly DR own content, or content from EBU partners).	Satellite FTA not possible due to rights issues. Cable, satellite and IPTV are all re-distribution, i.e. performed by another entity than the PSM.
Finland/ Yle	FTA	No FTA service available, but exceptionally outside DTT areas access cards are made available with subsidy. Regional PSM channel variants not available.	Must Carry. FTA but CTV-ops allowed to charge a technical service fee ~€5/month for the CTV-connection. Traditionally re-transmission of DTT, but recently also original transmission by PSM, based on agreement between PSB and CTV-operator.	No FT. Traditionally re-transmission of DTT, but recently also original transmission by PSM, based on agreement between PSM and CTV-operator.	All main channels of PSM as FTA. Regional PSM channel variants not yet available, but in the pipeline.	Market shares approx. - DTT & CTV both ≈40% - IPTV & OTT ≈ 10-15% - DTH <5%

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
France/ FTV	FTA	PSM services are encrypted for rights reasons, but with either free or one off-payment for viewing card (FTV). "Must carry" of PSM channels and "must deliver" for commercial DTT channels in all commercial satellite offers (no extra charges for DTT channels). 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 + availability of DTT channels through cable for the HH that have been disconnected to the DTT aerials by the cable operator.	"Must carry", minimum subscription €30/pm for triple play (no extra charge for DTT channels). Not all sub-local services available.	OTT under the trend francetv.fr.	Must carry is free for PSMs. Satellite, Cable & IPTV carriage must be on FRAND basis for commercial FTA DTT broadcasters. The portal francetv.fr will merge all non-linear and linear services edited by France Télévisions. Objectives are that every France TV content is to be dealt under this unique portal on every distribution.
Germany/ ARD BR DW HR MDR NDR RBB SR SWR WDR ZDF	FTA Additional Public Service Channels via MPEG-DASH OTT Live bundled with DVB-T2 in HbbTV 1.5+	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).	All channels "FTA", both live and on demand. Catch Up TV services via HbbTV/OTT on PC, iOS and Android in HTML5 Web browser as well as native Apps for iOS (App-Store) and Android (Play Store). Some Live-Stream with Geo-blocking depending on Content-Licensing. Occasional regional or national event live streams.	HDTV by satellite is FTA for PSMs.
Iceland/ RUV	FTA	PSM services are encrypted for rights reasons, but with one-off payment for viewing card (FTV). Local services are available.	Not available.	PSM included in a TV package bundled with Internet connection and STB lease.	Fully open (but geo-blocked) for local ip-addresses.	
Ireland/ RTE	FTA	FTA (on Ka Band spot beam) and FTV on Ku Band as part of a subscription package.	Must carry - Subscription required.	Must carry – Subscription required.	FTA services available in Ireland. Geo-blocking for some content – subscription service available for some content.	

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
Italy/ Rai	FTA	FTA. Encrypted for rights reasons, but with one-off payment for viewing card (FTV).	Almost no cable coverage nor penetration.	<1% use	All channels FTA, both live and on demand services. Geo-blocking for content rights.	
Montenegro/ RTCG	FTA	FTA	Subscription is required. The PSMs is present in basic TV packages of Commercial Operators.	Subscription is required. The PSMs is present in basic TV packages of Commercial Operator.	TV live and on-demand content available at RTCG Portal with no charge and no necessity to log in to a user-specific account.	The Satellite service of the Public Service - TVCG SAT is a specially designed program for the diaspora and free of content that do not have permission to broadcast outside the country. The live TV on the Portal is the same program that broadcasted via satellites. In the next few months it will switch to HD broadcasting. Now, only certain events on TVCG 1 Program, via several operators, are broadcasted in HD resolutions within the national geographical area.

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
Netherlands/ NPO	FTA	PSM is available within pay-TV packages.	Subscription is required. The generalist PSMs are "must carry" and available in all pay packages.	Subscription is required. The generalist PSMs are "must carry" and available in all pay packages.	All PSM channels (general and thematic) are available FTA in SD.	According to the Dutch Media law the PSM 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 PSM channels and the quality differ per platform. On DTT there are 3 generalist TV channels in HD, 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.

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
Norway/ NRK	FTA	Encrypted. Available outside DTT coverage areas with free access card (FTV). Not available in many areas where reception is blocked by the terrain.	Must carry. Operator entitled to charge. Not available in many rural areas.	PSM services available but the operator is entitled to charge. IPTV not available in many rural areas.	All NRK live and on-demand content available within Norway with no necessity to log in to a user-specific account. Geo-blocking used for all live content and for on-demand content with no international rights.	An extra DTT network is deployed in rural areas where satellite distribution is blocked by the terrain (590 transmitters; PSM only).
Poland/ TVP	FTA	FTA - only news channel (TVP info HD and Polonia) and Belsat TV (on Astra 4A) Other PSM channels included in pay TV packages on third parties' platforms and encrypted.	Third parties' networks: some programmes FTA under must-carry obligation / some encrypted.	No FTA. Minimum subscription required. Selected programmes only.	VOD services and several online channels available through TVP website and mobile app (Android/iOS/Windows Phone), also in Youtube and Facebook channels, FTA. Occasional dedicated channels (e.g. TVP Żagle, a virtual channel about sailing, Olympic channels). Supplementary services available online and via HbbTV. Geo-blocking used for some live services.	9 (of 14) programmes distributed via DTT. Belsat TV - Belarusian language television channel was formed in 2007 as part of TVP in partnership with Poland's Ministry of Foreign Affairs. Satellite broadcasting mainly on the territory of Belarus. English-language channel Poland IN- distributed multi-channel (VOD, Android / iOS application, Youtube and Facebook).

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
Portugal/ RTP	FTA	Two channels FTA: RTP International and RTP Africa. Sometimes, due to technical difficulties and when one transmitter is costly for few viewers, the owner of DTT network may supply satellite receivers, as a special service.	No FTA	No FTA	PSM channels are available through RTP Play. RTP is in the process to start producing exclusive content through RTP Play. Geo-blocking for content rights outside Portugal.	In DTT there is only one mux with 7 channels in SD. Among the 7 channels, there are 4 from RTP: Channel 1, Channel 2, Channel 3 (News channel), and Memory (old content from archive). Then there are two commercial channels and the Parliament channel. The penetration of cable television (IPTV, or satellite in rural areas) reaches 80% of the Portuguese households, so, DTT serves only a minority of people and some of them, which in the second house only have DTT.
Russian Federation/ RTR	FTA for 20 TV channels, including Channel One and 3 RTRTV channels, and for 3 RTR radio channels. Must carry rules for 20 TV channels and 3 radio channels. Regional versions are available.	FTV for 20 TV channels, including Channel One and three RTRTV channels, and for 3 RTR radio channels, outside DTT coverage areas. Must carry rules for 20 TV channels. Regional versions are not available.	FTA for 22 TV channels, including Channel One and 3 RTR TV channels and for 3 RTR radio channels. Must carry rules for 22 TV channels and 3 radio channels. Regional versions are available. A small monthly payment for technical maintenance (between 1 and 2 Euros).	FTA for 22 TV channels, including Channel One and 3 RTR TV channels, and for 3 RTR radio channels. Must carry rules for 22 TV channels and 3 radio channels. Regional versions are available. A small monthly payment for technical maintenance (between 1 and 2 Euros).	PSM programmes available as if FTA model, with advertising and geo-blocking; some programs that make up TV channels are not available due to rights restrictions. No Must Carry rules.	

Country/ EBU Member	DTT	Satellite	Cable	IPTV	Open Internet	Comments
Slovakia/ RTVS	FTA	- "Must carry" obligation - PSM encrypted - Subscription approx. €3.99/pm min.	- "Must carry" obligation - Subscription approx. €12.99/pm min. Generally, not available in the rural areas.	- "Must carry" obligation - Subscription (amount depends on the TV programmes + internet package) or/and an activation fee. - Availability of service depends on local internet infrastructure	FTA, but only some programmes. Availability of programmes depend on internet distribution rights. Some programmes are distributed with Geo- blocking (depends on rights licensing).	10 programmes distributed via DTT FTA. 20 programmes distributed via DTT PAY TV.
Slovenia/ RTVSLO	FTA	PSM services are encrypted for content rights reasons. FTV possible with access cards.	FTA	PSM included in a TV package bundled with Internet connection and STB lease.	Streamed FTA. Geo- blocking in other countries, depending on content rights.	
Spain/ RTVE	FTA	PSM encrypted, two main PSM programmes included in pay TV packages.	No FTA, two main PSM programmes included in pay TV packages.	No FTA, PSM encrypted, two main PSM programmes included in the pay TV packages.	All the programmes are FTA in the Spanish territory. Geo-blocking in other countries, depending on content rights.	Satellite used to provide services where there is no DTT coverage. In these areas satellite decoder is provided free of charge.
Sweden/ SVT	FTA	PSM encrypted and limited to the Swedish audience with one-off payment for viewing card (FTV).	Must carry but charged. Freeview in analogue cable.	Must carry but charged.	Streaming of PSM channels on open Internet. Geo-blocking outside Sweden.	
Switzerland/ SRG SSR	Not available as from 30/06/2019	PSM encrypted and limited to the Swiss audience with one- off payment for viewing card (FTV).	Minimum subscription required.	Subscription required (normally bundled with Internet and phone connection).	All live program available on streaming with geo-blocking and DRM.	
UK/ BBC ITV Channel 4 Five	FTA	FTA via Freesat or Freesat- from-Sky. When subscribing to the Sky commercial platform, PSM services available at no additional cost. Entry subscription pricing of £21.50 per month for Sky.	Only available with a phone & broadband bundle, with a minimum pricing of GBP54 per month.	No IPTV only available. Part of DTT/IPTV hybrid package starting at GBP33 per month.	Available OTT through BBC iPlayer client. Geo- blocked outside the UK. All other UK PSMs are available through own OTT client (ITV Hub, All4 and My5).	DCable has a "must carry" for public service channels with the PSM channels include in the lowest cost tier