

Press release

## AUDIOVISUAL AND DTT

### Regulating TDF: Arcep launches a public consultation on its “Scorecard and outlook” as it prepares for a new regulatory period

Paris, 3 May 2021

Today, Arcep is publishing its “Scorecard and outlook for the wholesale market for digital terrestrial television (DTT) broadcasting services” for consultation. This document delivers an account of the state of competition in the wholesale market for terrestrial broadcasting services, and examines past and predictable future developments in technical broadcasting methods for audiovisual content. It also includes the proposed commitment that terrestrial broadcaster, TDF, submitted to the Authority regarding the next regulatory period.

**Although losing ground to alternative television broadcasting methods, and to the development of new ways of consuming audiovisual content, DTT remains a prominent channel for accessing TV programming in France.**

DTT’s relative share amongst TV viewing methods has continued to decrease steadily, as it is being replaced by alternative television broadcasting systems over broadband and superfast broadband networks. ADSL and fibre networks have steadily joined the ranks of veteran television distribution systems: terrestrial (DTT platform), satellite and cable broadcasting. Depending on whether the video stream is relayed by an internet service provider (ISP), these new systems are referred to as either TV over IP (IPTV) or over the top (OTT).

In France, IPTV broadcasting was widely adopted thanks to ISPs’ triple play bundles, which included TV plans. Publications from French broadcasting authority, CSA, reveal that more people have been watching TV over IP than via DTT since Q1 02017. This trend of replacing DTT is expected to continue as the number of households eligible to subscribe to broadband and superfast broadband internet services increases.

Like satellite, however, DTT provides the ability to bring coverage to areas where fixed superfast access networks have not yet been fully deployed. It also remains subject to an obligation to cover 95% of the population in Metropolitan France.

Given the current situation, it is likely that DTT will decrease in prominence over the coming years, whilst nevertheless remaining the system of choice for a certain number of users.

#### **A relatively stable market situation compared to the previous regulatory period**






Competition in the terrestrial broadcasting market is minimal and evolving very little. TowerCast, the only alternative operator to incumbent broadcaster, TDF, has a 24.5% share of the market (in number of service points operated) and has focused its strategy on replicating sites on the complementary network.

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**It was in this context that TDF submitted their proposed commitments to Arcep, on 2 April 2021**

The commitments would “*come into effect when Arcep adopts a decision making them legally binding,*” and remain in effect “*for a period of five years*”.

For Arcep, the purpose of this public consultation is to obtain stakeholders’ opinions on these proposed commitments. Interested parties have until 3 June 2021 to send their remarks to Arcep.

Once the consultation is complete, Arcep will publish its resulting draft decision for consultation.

**Associated document:**

[Scorecard and outlook for the wholesale market for digital terrestrial television broadcasting services](#)

**Arcep at a glance**

The Regulatory Authority for Electronic Communications, Postal Affairs and Print Media Distribution (Arcep), a neutral and expert arbitrator with the status of independent administrative authority (IAA), is the architect and guardian of internet, fixed and mobile communications and postal networks in France.

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