

Press release

AUDIOVISUAL AND DTT BROADCASTING

Regulation of digital terrestrial television broadcasting: Arcep launches a public consultation on its “Scorecard and Outlook” as it prepares for a new regulatory period

Paris, 20 March 2026

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 future development prospects, notably with respect to the progress being made by alternative broadcasting methods and audiovisual content consumption practices. The Authority also provides the proposed commitments from terrestrial broadcaster, TDF, for the next regulatory period.

DTT, which is subject to minimal coverage obligations, has been steadily losing ground due to the development of broadband and ultrafast broadband networks, and new ways to consume audiovisual content

DTT is a broadcasting system that is subject to a minimum population coverage threshold, requiring national TV service providers to ensure that their services are available to at least 95% of the population of mainland France. DTT’s relative share amongst TV viewing methods has nevertheless continued to decrease steadily, as it is being replaced by broadband and superfast broadband network-based systems.

Viewers in France watch television on a combination of networks: digital terrestrial (DTT), satellite, cable, ADSL and fibre. There are two models for distribution over ADSL and fibre networks, depending on whether the video stream is distributed by an internet service provider (ISP), in which case it is referred to as IPTV; if not, it is referred to as over the top (OTT) streaming.

In France, IPTV broadcasting was widely adopted thanks to ISPs’ triple play bundles, which included TV plans. More people have been watching TV over IP than via DTT since 2017. This trend of replacing DTT is expected to continue as the number of households eligible to subscribe to broadband and ultrafast broadband internet services increases.

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, was broadcasting to around 30.1% of service points at the end of 2025, and has focused its strategy on replicating sites on the complementary network.

It was in this context that TDF submitted their proposed commitments to Arcep

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’ views on its “Scorecard and Outlook” analysis of the regulation of the wholesale market for terrestrial audiovisual broadcasting services, and on these proposed commitments from TDF. The deadline for interested parties to submit their contributions to Arcep is 4 May 2026.

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

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Associated document

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

Arcep at a glance

The Regulatory Authority for Electronic Communications, Postal Affairs and Press 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 electronic communications, postal and press distribution networks in France

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