

Press release

AUDIOVISUAL AND DTT BROADCASTING

New regulatory period for the upstream wholesale market for digital terrestrial television broadcasting services: Arcep launches a public consultation on the draft decision

Paris, 23 July 2026

Arcep has begun the process of reviewing the analysis of the upstream wholesale market for digital terrestrial television (DTT) broadcasting services. To this end, the Authority held a public consultation in spring 2026 on its “Scorecard and outlook” document, along with proposed commitments from terrestrial broadcaster, TDF. Factoring in market stakeholders’ feedback to this first consultation, Arcep produced a draft decision for the period running from 2027 to 2031, to which a revised version of TDF commitments has been attached. This draft decision is being published today for public consultation. It will also be submitted to the Autorité de la concurrence and to Arcom for their opinion.

Draft decision for a new regulatory period (2027-2031)

Arcep notes that digital terrestrial television (DTT) still holds a special place in France: it is the only broadcasting system for which TV service providers must comply with coverage obligations, and which guarantees DTT channels a certain degree of visibility. The Authority therefore concludes that, as it stands, terrestrial television broadcasting cannot be considered a perfect substitute for other TV broadcasting methods. Arcep also observes that market competition remains limited and is evolving very little, as the vast majority of DTT broadcasting originates at TDF sites.

In this context, having completed its analysis, the Authority considers TDF to enjoy significant power in the upstream wholesale market for DTT broadcasting services.

TDF commitments make it possible to secure alternative DTT broadcasters’ access to the resources they need to ensure effective competition

Arcep’s analysis leads to the conclusion that TDF commitments, made for a period of five years, would help to achieve the objectives set out in Article L. 32-1 of the French Postal and Electronic Communications Code (CPCE), and notably to the development of effective competition in the electronic communications sector. They would also help achieve the goals set for the next regulatory period, namely:

- securing alternative DTT broadcasters’ access to the resources they need in the upstream wholesale market, to operate in the downstream wholesale market;
- ensuring predictability for market actors, while maintaining sufficient price pressure on the operator with significant power in this market (i.e. the SMP operator).

Arcep invites all television broadcasting market actors to share their comments on the draft analysis decision on the upstream wholesale market for digital terrestrial television broadcasting services, by 6 pm on 18 September 2026.

Today, Arcep is also publishing the responses it received to the public consultation on its “Scorecard and outlook” document, which ran from 20 March to 4 May 2026.

Associated documents

- [Draft analysis decision on the upstream wholesale market for digital terrestrial television broadcasting services, submitted to public consultation](#)
- [Stakeholders' publicly available contributions to the consultation opened on 20 March 2026](#) (zip – 4,69 Mb)

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 (AIA), is the architect and guardian of internet, fixed and mobile electronic communications, postal and press distribution networks in France.