

OVERVIEW AND OUTLOOK OF DTTB IN FRANCE

RSPG Sub-group on sub-700 MHz band

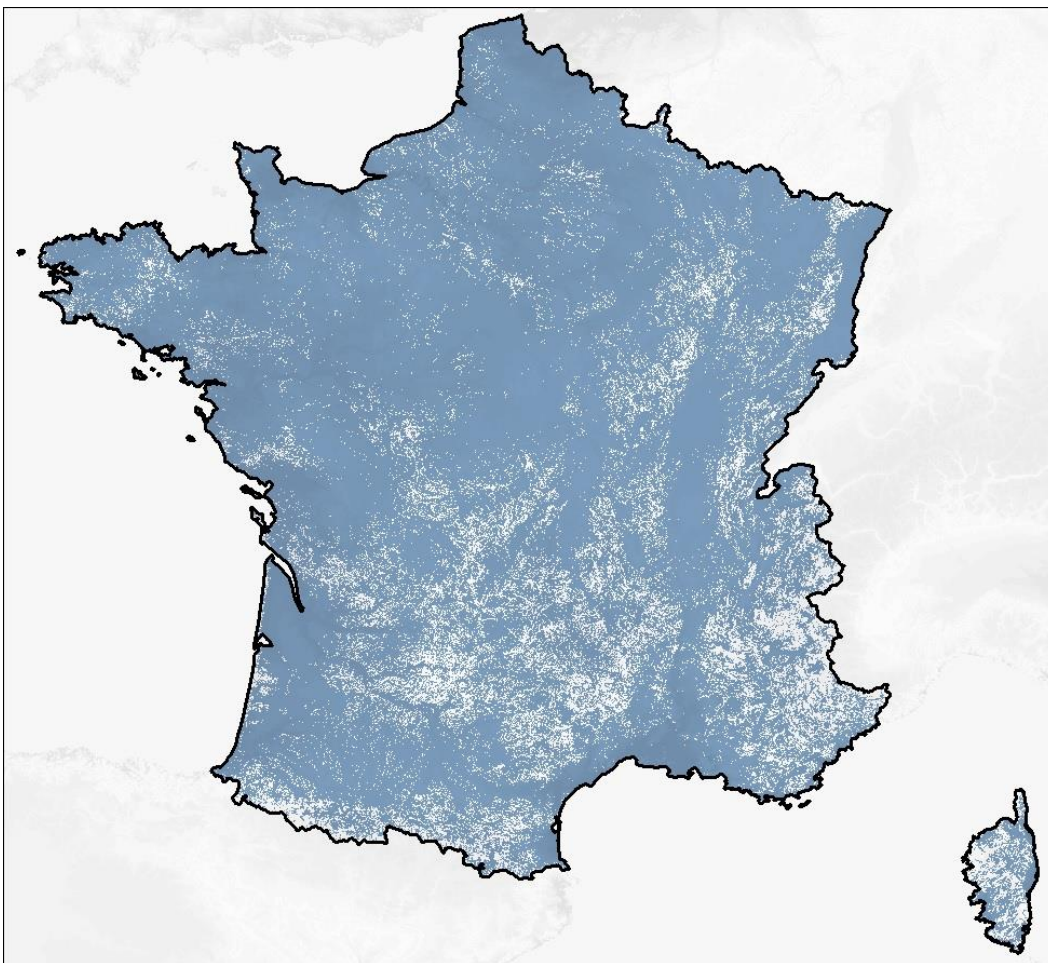
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01

FRENCH DTTB : CURRENT LANDSCAPE

/ A major and ubiquitous TV broadcasting network

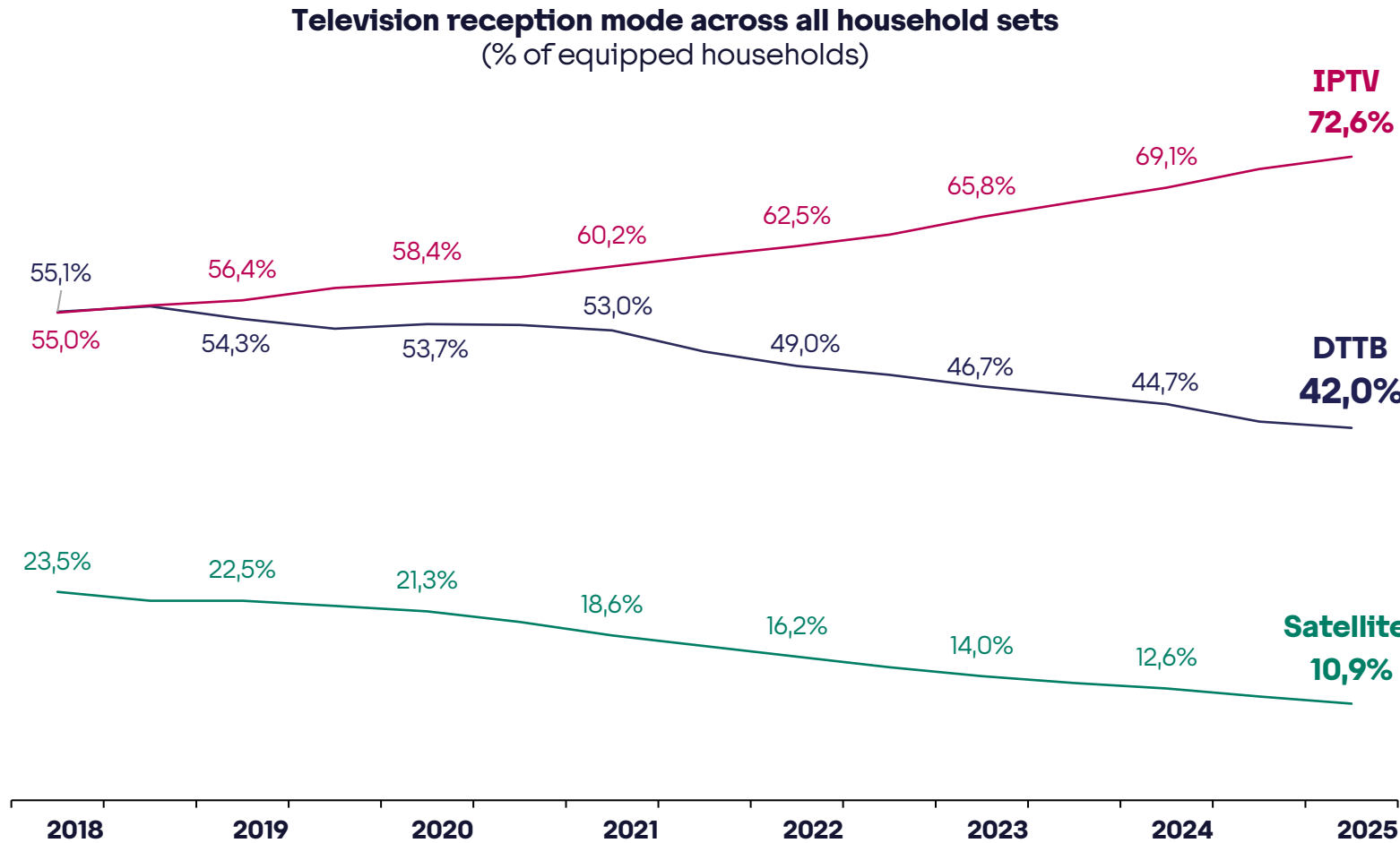


Current coverage of national DTTB

DTTB in mainland France

- **+ 95% population coverage**
- **1 626 transmitters** operated by 2 national network providers
(+ 364 additional low-power transmitters operated by local authorities)
- **6 national multiplexes** transmitting in DVB-T / MPEG4 (all services in HD)
- **Up to 31 different national programmes** (26 free-to-air)
+ 42 local services.
- Since mid-2024, one additional simulcast multiplex transmitting in DVB-T2/HEVC (with +70% population coverage)

DTTB continues to be a prevalent TV reception mode in France



2 out of 5 households use DTT

29% of primary television sets are connected via DTT.

16% use DTT as the sole mean
Among them, more than 4 out of 5 do so by choice

DTTB remains a cornerstone of the French audiovisual landscape

- Recent call for applications reflects steady interest in DTTB
- Launch in February 2024 of a call for applications for the **renewal of 15 national licences on DTTB from March 2025**.
 - All 15 channels with licenses up for renewal applied for extension, **among 24 total applications**.
- **Notable consequences for the television landscape:**

These 30 channels:
+90%
total audience
of linear TV

French DTT national landscape until 28 February 2025

7 Free-to-air public programmes no subject to call for applications



18 Free-to-air private programmes



5 Pay-TV programmes



 Programme subject to licence renewal in 2025 which applied for its extension

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- **Notable consequences for the television landscape:**
 - Non-renewal of two licenses
Decision of the content providers of a **definitive shutdown of the corresponding programmes** although they could continue on other reception modes
 - Renewal of 9 licenses until 2035

French DTT national landscape

from 1 March 2025

7 Free-to-air public programmes

no subject to call for applications



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- Unsuccessful application - Non-renewal of the licence
- Successful application

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 - Renewal of 9 licenses until 2035
+ Launch of two new national FTA channels
 - Subsequent withdrawal of the applications for license renewal of 4 pay-TV channels
→ **Only one pay-TV channel** (with clear-to-air timeslots) **remains on the DTT platform.**

French DTT national landscape

from 6 June 2025

7 Free-to-air public programmes

no subject to call for applications



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5 Pay-TV programmes



No more on DTT

2 newcomers



Unsuccessful application - Non-renewal of the licence
Successful application Subsequent removal

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→ **Only one pay-TV channel** (with clear-to-air timeslots) **remains on the DTT platform.**
 - Review of channel numbering scheme **for all platforms**
- **Significant media coverage of these decisions**

French DTT national landscape from 6 June 2025

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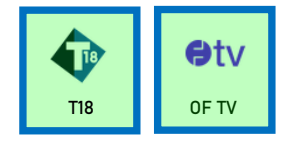
18 Free-to-air private programmes



1 Pay-TV programme



2 newcomers



- Unsuccessful application - Non-renewal of the licence
- Successful application
- Subsequent removal
- New numbering of the programme spread on all reception modes

02

KEY ASSETS AND BENEFITS OF DTTB FOR FRANCE

Social benefits of DTTB

The following aspects of DTTB are especially significant for France:

- **Social inclusion**
 - Free, universal and non-profiled access without subscription
 - Ease of use, valued by the elderly people and those with limited digital literacy
- **Cultural pluralism and regulation**
 - Programmes on DTTB are subject to content obligations via a bilateral agreement ("convention") concluded with the regulation authority in exchange of free radio spectrum disposal.
 - DTTB ensures a stable and regulated competitive environment
- **Technical interoperability**
 - DTT ensures terminal interoperability by design, allowing users to choose their preferred device, unlike most IPTV providers that impose dedicated terminals (which has to be given back at the end of subscription).
 - Free to air, easier to test and promote new features than within proprietary and closed environments

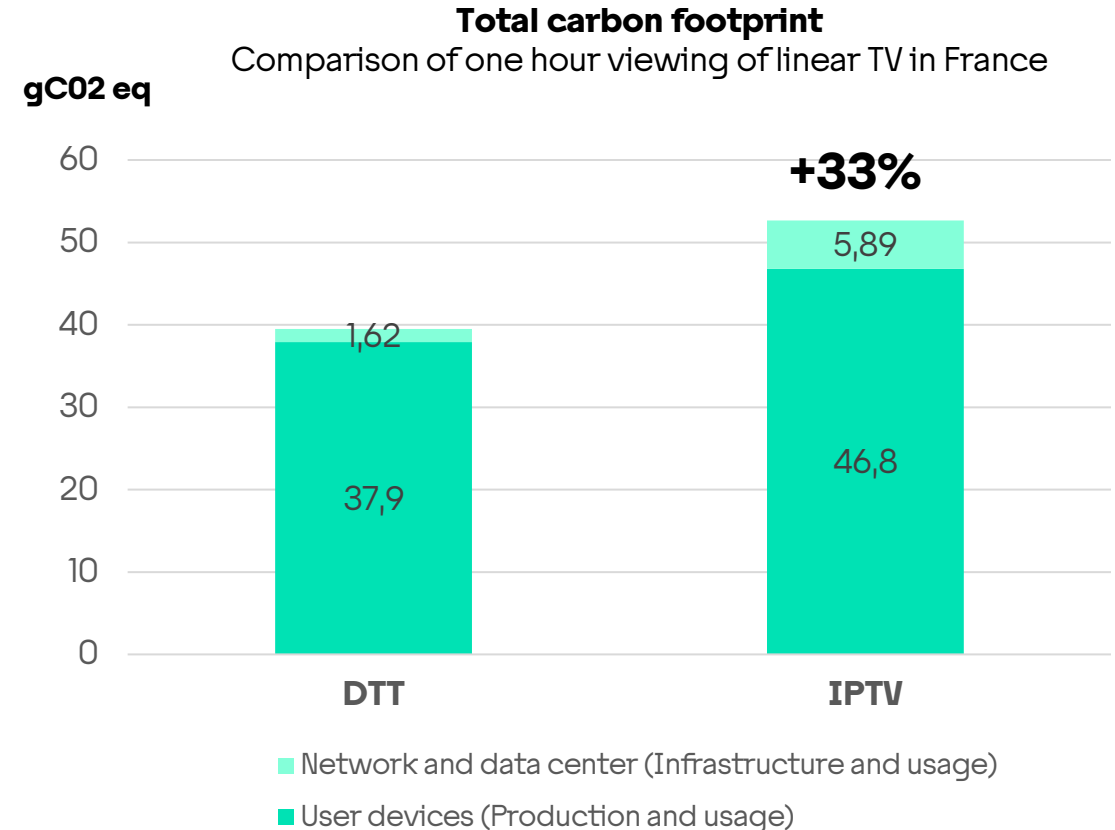
Reliability, sovereignty and robustness of the French DTTB platform

The French DTT platform delivers resilient broadcasting nationwide, distinguished by the following key attributes:

- The broadcasting of the six national multiplexes is managed **at the national level** by two network provider companies, TDF and Towercast.
- Around ~100 main transmitters (*High-Power High-Tower*) ensure the coverage of +90% of the population of mainland France.
=> **Quick restoration in case of disruption.**
- High reliability: on average, **only around 0,1% of all transmitters** have an outage on a weekly basis.
=> **DTT remains suitable for crisis communication**
- Internet Independence: French DTT network mainly operates **without relying on the internet**, reducing vulnerability to cyber-attacks and foreign interference.

/ DTTB: eco-friendly choice for linear TV consumption

- In collaboration with two other national authorities, the Arcom has published in October 2024 a study on the environmental impact of audiovisual consumption in France.
- This study has comprehensively considered from end-to-end various technologies, usage scenarios, and infrastructure in this assessment.
- Regarding linear TV, the primary contribution to carbon emissions stems by far from the manufacturing of terminal devices, most notably the television set.
- **The network's contribution to the carbon footprint is however significantly lower —72% less— with DTT compared to IPTV, making IPTV 33% more impactful on total.**

**Devices:**

DTT : Smart TV with embedded DTT receiver

IPTV: Smart TV + Modem + IPTV set-up box

03

OUTLOOK: FUTURE PERSPECTIVES

Modernization underway to ensure the platform's long-term future

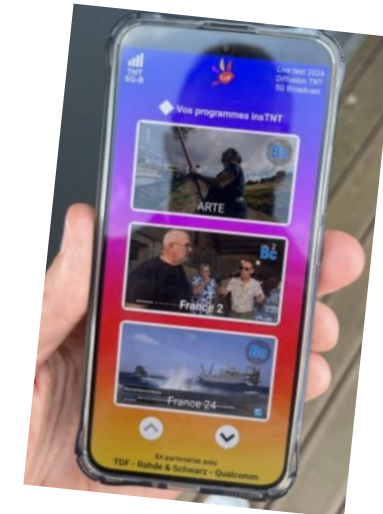
Successful launch of a nationwide UHD multiplex in 2024

- **Roll-out throughout S1 2024**, with the aim being the coverage of the **Paris Olympics and Paralympics by France Télévisions**.
Up to 74,7% population coverage for 210 transmitters
- **Permanent simulcast broadcast of France 2 in UHD using DVB-T2/HEVC** and temporary broadcast of France 3 UHD and M6 HDR in Summer 2024.
- **Ongoing discussions and public consultation in the near future to consider wider expansion.**



Exploring the potential of 5G Broadcast

- The Olympic and Paralympic period served as the stage for a **large-scale experimentation of 5G Broadcast technology**, as an initiative of several public content providers in association with French network providers.
- Further experimentations and studies on going both on the technical front and in terms of business planning.
Both national network providers are committed on the subject.



Future of DTTB platform

Regarding DTTB national licenses

- Latest DTTB licenses have been granted **until February 2035**.
- Public consultation launched by Arcom in the coming weeks to consider potential allocations of spectrum resources freed by the withdrawal of 4 pay-tv channels in the recent call for applications.
 - **Impact assessment in S2 2025 and potential call for applications thereafter.**
- Another call for applications is due to be launched next year for the expiration of 6 national licenses in 2027

Regarding UHF sub-700 MHz band

- **Until 31 December 2030 at least, the whole 470-694 MHz band is dedicated to and safeguarded for DTTB** both by national law and EU decision 2017/899.
- Government report to Parliament giving clues and insights on potential perspectives of television delivery beyond 2030 is due to be issued by end 2025, as expected by law.



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