Digitisation 2006

Start of the digital era

Current developments: platforms, addressability and IP-TV

ASSOCIATION OF REGULATORY AUTHORITIES (ALM)

GSDZ Commission on Digital Access

ISTAS
Start of the digital era
Current developments: platforms, addressability and IP-TV

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Start of the digital era

Current developments: platforms, addressability and IP-TV
Challenges for legislation and regulation

1. In the interests of plurality and competition, legislation and regulation must develop comprehensive rules for the regulation of platforms. These rules must focus on the aspects which are relevant for the formation of opinion, i.e. the compilation and the marketing of channels vis-à-vis end-users. The potential impact of vertical integration deserves special attention. The provisions of the Interstate Broadcasting Treaty securing the plurality of services must be modified to account for the demands of the digital era.

2. The legal provisions governing concentration in the media must be complemented by rules concerning platform competition which ensure adequate choice for consumers. In addition, there must be provisions to allow service providers equal access to the various platforms and end-users.

3. As experience has shown, the rules which proved their worth in the analogue world afford the German regulators with only limited means for an effective regulation in the digital era. Only if network operators and content providers lay their agreements fully open to regulators will regulators be able to assess the arrangements adequately. The regulators therefore require instruments comparable to those of the cartel authorities in order to establish whether content providers are discriminated against or not given an equal chance.

4. During the transition from analogue to digital transmission, the cable network operators are reducing the number of analogue channels and market additional digital channels and triple-play services as a priority. This presents a danger for the plurality of services as most broadcasters are still dependent on analogue transmission for the foreseeable future. The German regulatory authorities are working at balancing the issues emanating from digitisation as far as the legal framework allows, expecting both public-sector broadcasters and the commercial television groups to shoulder the reduction of analogue transmission capacities equally.

5. Analogue-digital transition in the cable network presents the greatest regulatory challenge. In the current period of transition limits capacities this could present a threat particularly for smaller broadcasters. The regulators are therefore calling for pilot projects testing the options for a complete switchover to digital transmission; this proposal, however, has been met with little positive response from the major cable network operators so far.

6. The regulatory authorities have an open view on the introduction of addressable transmission platforms which could open up a fee system for the provision of services. Only in this way can the traditional transmission platforms for broadcast services remain competitive in the challenge posed by broadcast services transmitted via the internet.

Summary
In the light of the stagnant advertising market, the increase in services available and the growing competition of the internet, the variety offered by German television can be preserved and extended only if new sources of revenue are opened up.

7. The regulatory authorities expect the cable network operators and broadcasters to invest in the industry in order to win additional customs; for consumers, digital media must offer a clear added value. However, the planned encryption of digital satellite transmission which opens up the possibility for the providers to raise a monthly fee from consumers, does not meet this requirement on its own.

8. Broadcasting and media legislation must be advanced under the proviso of technology neutrality: The licensing of a broadcast service is independent of the network which carries it. What must be taken into account, however, is the relevance of the services for the formation of public opinion.

9. Opportunities for regional and local contents in the digital world are not sufficiently safeguarded by the must-carry provisions which applied so far: The transition from decentralised distribution systems which are now being replaced by central (national) structures of transmission must not negatively impact on the opportunities for regional and local services in the market. The regulatory authorities have therefore made the proposal that the extra cost incurred of bringing regional and local services to their audience should be included in the overall funding costs of the networks.

10. The use of digital terrestrial networks has to provide an adequate framework for a standard licensing procedure for national services; this applies to radio as well as to mobile television and multimedia services. The regulatory authorities have paved the way with their approach regarding DMB and DVB-H; this now requires an adequate underpinning for regular operation.

**Structural developments**

The process of digitisation also sees the development of new business models. Since the start of 2006, the services offered by the two major commercial television groups have also been transmitted digitally in the German cable networks. This resulted in a major change as the content providers now no longer pay for having their services being transmitted in the cable, but generate income for the distribution of their traditional channels and for the revenues from marketing extra services. As the cable operators as a rule refinance these costs by raising the cable fee, it is the end-user who covers the costs.

For satellite transmission, Astra, RTL Group and ProSiebenSAT.1, the two major commercial TV groups, are considering a concept under which the commercial channels are encrypted and a permanent fee is raised from satellite households.

Plans for the basic encryption of commercial channels transmitted via cable and via satellite will result in a "pay-TV light" concept under which a fee becomes due for services which have so far been available free. The relevance of pay-TV packages will increase for the marketing of digital transmission networks.

Platforms mainly package and market services against pay; this is their main function. Unlike the old model under which the cable network operators provided a mere transport function, the network operators will now have more and more influence in the future development of the media. Content providers are facing new competition from platform operators and compete for the direct access to customers.

The acquisition of the Bundesliga transmission rights by Arena, a subsidiary of cable network operator, Unity Media, and by German Telekom, marked the arrival of network operators in the attractive contents business.
Deutsche Telekom and other providers are entering the competition against cable operators by offering IP-TV, providing television channels and on-demand services via DSL in specified areas. “Free” internet television is developing alongside without any control by content platforms. The number of households able to receive broadband internet is increasing considerably faster than the share of digital households via the traditional broadcast transmission routes. For consumers, an interesting alternative might open up rapidly in this field. It will not be long before the leading internet portals such as Google will take up the marketing of television channels via IP-TV.

Television via mobile phones has the choice of three technologies: 3G via mobile telephony networks as well as DMB and DVB-H via broadcast networks. In contrast to the traditional terrestrial transmission, the network is no longer paid for by the service provider, but by the consumer. Content providers and mobile phone operators are competing for the platform functions.

**Market developments**

The number of digital households continued to increase during 2006. Some 31.6 per cent of homes can now receive digital television; this is an increase of just under six per cent or around two million television households compared to 2005. This, however, still secures only a medium position for Germany in a European comparison, and it lags far behind the UK where the rate of digitisation has exceeded 70 per cent of homes.

The pace of digitisation varies, depending on the transmission platform: While 57.1 per cent of terrestrial homes receive digital TV and the rate for digital satellite reception has now increased to 47.2 per cent, only 15.2 per cent of German cable households actually opt for digital television. In the ranking of transmission platforms, satellite is still in the lead with 62.8 per cent in digital homes, followed by cable (25 per cent) and terrestrial TV (17.2 per cent).

The transition from analogue to digital terrestrial transmission could be concluded by the end of 2007. All major areas of population have been switched to DTT by now; for the remaining regions, the public-sector broadcasters are planning to complete switchover during next year at the latest. The national commercial services transmitted via analogue capacities are now available only locally and regionally.

The digitisation of transmission through the air has rejuvenated this traditional mode of transmission, especially in the major centres of population. In the DTT core areas, its share rose from 10.4 to 12.8 per cent during last year; in Berlin-Brandenburg, the first region to switch over completely, the share increased from 14.5 to 19.4 per cent. In regions offering only public-sector channels via digital terrestrial transmission such as central Germany or the Greater Stuttgart region, DTT is far less successful with only 4.8 per cent of households.

DTT has turned out a particular success with the younger audiences, reaching the highest level of transmission among 14- to 29-year-olds: They make up 8.9 per cent of the audience. By comparison, the share of viewers aged 60 – 69 years is only 3.1 per cent.
Digitisation of the German television market: facts and figures
Current status of digitisation in German television households, October 2006

1. Objective
As for 2005, the Commission on Digital Access (GSDZ) of the Directors’ Conference of the Regulatory Authorities in Germany (DLM) this year also conducted a special national survey on the status of digitisation of cable, satellite and terrestrial television in Germany. Television reception is shown for up to three sets per household, providing a survey of the state of digitisation of all sets used in the homes, thus documenting the process and progress of digitisation.

The following presentation and analysis are focussed on the major data; further details are available under www.digitalerzugang.de

2. The status of digitisation
Analogue-digital switchover, i.e. the decision on the date for analogue switch-off, must be underpinned by data on the number of households in Germany already receiving television via digital means.

The number of digital households in 2006 reached 31.6 per cent, an increase of approx. six percentage points or some two million television households more than in 2005.

Overall, some 10.7 million homes currently own at least one digital TV receiver, and thus usually a digital set-top box. Most of these homes have gone fully digital, using digital reception equipment only. In around one fifth of digital homes, analogue reception equipment can also be found. Compared to 2005, this figure has hardly changed (see Fig. 1).
31.6 per cent of television households have access to digital television.
2. The transmission infrastructure
The shares held by the main transmission platforms has remained largely constant with cable reaching 52 per cent, satellite coming to 42 per cent, and terrestrial transmission amounting to nine per cent. In absolute figures, some 17.57 million households receive television via cable, approx. 14.24 million homes watch satellite TV, and 3.13 million households get their television services through the air (see Fig. 2).

Notwithstanding the stable market shares of the three transmission platforms overall, digital transmission did see some changes. The share of digital terrestrial homes exceeds the number of analogue households. The largest number of digital households and the largest increase were scored by satellite TV. Digital cable, on the other hand, still remains grounded at a low level despite the first-ever increase noted.

Satellite reception continues to drive digitisation. Compared to 2005, the number of digital satellite households rose by just under one million or 2.8 percentage points, to 6.6 million households, thus confirming the strong trend of the last years which were characterised by a continuous increase in the number of digital set-top box sales (DVB-S). However, it appears doubtful whether this development will persist. In the view of the GSDZ, basic encryption of the digital commercial channels which is scheduled to start in 2007 could slow down developments. There is confusion among consumers regarding technical standards and the question whether decoders will be suitable for all pay services. And the introduction of a monthly digital fee will undermine an important argument used in favour of satellite reception compared to cable.

These aspects will become evident in the next data surveys.
Digital cable has also seen a positive turn. Even though cable still lags far behind regarding digitisation, some 800,000 homes (an increase of 2.2 percentage points) in 2006 opted for DVB-C, thus almost matching the change in the satellite sector.

Cable seems to have overcome the long-wrangling confusion which arose in the context of privatisation and the drawn-out negotiations for simulcast transmission at last. In 2006, no major structural change was noted in the cable market for the first time which has finally consolidated. At the beginning of the year, the extended and complication negotiations concerning digital transmission of the two major commercial television groups could be successfully concluded. The cable network operators concentrated their efforts on marketing, thus winning points with triple-play offers over satellite transmission.

All in all, the positive trend is expected to continue – especially since there is no debate regarding a basic encryption for cable transmission which characterises the debate on developments in the satellite sector.

The market share of terrestrial television slipped back slightly to 9.2 per cent. Some 5.3 per cent of all television households receive their television channels through the air. Since the 2005 survey, the number of DTT households has increased by 300,000, a plus of 0.9 percentage points, thereby overtaking the number of analogue terrestrial homes for the first time.

Should all analogue transmitters be switched off successively in line with the further expansion of DTT and the introduction of DVB-H over the next few years, total switchover could be reached as early as the end of 2007. Unlike with cable and satellite, there is a so called „hard switchover“ for terrestrial transmission since the lack of capacities does not allow for analogue and digital simulcast operations. Digital switchover is thus carried out fully in each region and is conducted region by region. Cable and satellite, on the other hand, intend to cease analogue transmission only once the number of digital homes allows for analogue switch-off without any major loss in audience reach.

Whether and how the distribution of television services via DSL (DSL-TV) might develop as a fourth mode of transmission, remains to be seen. DSL services only went operational during 2006; reliable data will thus not be available until 2007 at the earliest.
As explained before, terrestrial transmission has made the biggest progress concerning digitisation thanks to the concept of „hard switchover“. With some 47.2 per cent of digital homes, digital audience reach of satellite television will soon exceed analogue TV consumption via satellite. Rapid progress here, too, is due to the fact that satellite consumers are familiar with set-top boxes and find it easier to switch to digital sets during the normal replacement cycle. Furthermore, the market has for some time now provided a large range of receivers offering attractive additional functions (electronic programme guide (EPG), or personal video recorder (PVR)).

By contrast, cable is only in the starting process. Most cable PVR sales so far were devised for analogue reception only. The consolidation process outlined above and increased marketing activities will lead to a wide range of set-top boxes being offered in the shops shortly (see Fig. 3).
The analysis of transmission platforms in digital homes shows a clear lead for satellite. DVB-S reached an outstanding 62.8 per cent, almost three times the share of DVB-C (24.9 per cent), with DTT coming to 17.2 per cent. Quoted in absolute figures, only some 1.79 million households receive digital television through the air and 2.46 million homes opted for digital cable while 6.61 million households have a digital satellite dish. The graph, however, also shows the special role of the extensive cable reception. A slight increase in digital cable homes results in a downturn of the relative digital reach of the other modes of transmission despite the fact that they increased the number of consumers in absolute terms (see Fig. 4).

![Fig. 4 Modes of reception in digital households](image-url)

Base: 33.904 million TV households in Germany
Source: GSDZ 10/2006

- Cable: 24.9% (2006), 22.6% (2005)
- Satellite: 62.8% (2006), 66.8% (2005)
- Terrestrial: 17.2% (2006), 18.0% (2005)
4. The receiver situation

The 2006 survey also differentiated between reception via the first, second and third sets at home. Some 33.9 million homes in Germany own just one television set, 11 million households have two sets, and in some 2.5 million homes three or more television sets are used (see Fig. 5).

Regarding the distribution of transmission platforms, the homes owning one or two sets mirror the overall picture: Cable reception dominates, followed by satellite, with terrestrial reception coming far behind. Only the third set changes this picture: Here, satellite reception comes first.

Of the total 47.8 million television sets, 13.9 million can receive digital services. DVB-S dominates for all three sets with some nine million receivers with DVB-C and DTT sets sharing the remainder equally with two million sets each.

Interestingly, the rate of digitisation has remained constant for satellite homes and terrestrial digital TV concerning the first, second, and further sets. For digital cable, the rate of digitisation goes down, the higher the number of sets rises.

In the light of this development, there is no support for the theory claiming that DTT is used largely for the second and third set at home. What still awaits an explanation, however, is the difference between the number of homes receiving DTT and the markedly higher sales figures for set-top boxes.

A further relevant factor for the continued development of digital television is the technical specification of the set-top boxes available in the market. According to a forecast by Goldmedia based on GfU/GfK data, the share of the so-called free-to-view receivers in 2006 was around 71 per cent which is still very high despite a continual decrease over the past years.

For the technical standards of the set-top boxes, there are only some estimates available, putting the number of digital satellite boxes with a common interface (CI) permitting several encryption systems to be addressed via one module, at just under one third. Some forty per cent of all satellite boxes in the market are estimated to be suitable for pay-TV reception thanks to a CI or embedded encryption system (embedded CA).

In the cable sector, almost all set-top boxes are suitable for pay-TV reception, most of them offering embedded encryption systems (embedded CA).
Fig. 5  Reception via the three sets used most frequently

Base: 33.904 million TV households in Germany
Source: GSDZ 10/2006
5. DTT reception in Germany

Digital terrestrial reception has now reached 57.1 per cent, thus leading digitisation. Commercial television is now longer broadcast via analogue capacities, the major centres of the population have switched to digital transmission while for the remaining areas, public-sector broadcasting is planning to go digital in the course of 2007 at the latest.

In general, the digitisation of terrestrial television transmission has turned the downward trend of terrestrial transmission around. In the major conurbations, terrestrial reception is gaining in attraction: In the core areas for DTT, the share has risen from 10.4 per cent in 2005 to 12.8 per cent; the figures for Berlin-Brandenburg which lead the switchover process, increased from 14.5 per cent to 19.4 per cent (see Fig. 6).

In areas offering only public-sector channels via DTT, e.g., central Germany or the Greater Stuttgart region, this mode of transmission has scored only limited success. The share of DTT households here only reaches 4.8 per cent. Both these regions were newly developed following the 2005 survey. In 2006, DTT was available in all major German regions (see Fig. 7).

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Fig. 6  DTT reception in the DTT core areas

<table>
<thead>
<tr>
<th>Region</th>
<th>2006</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Berlin/Brandenburg</td>
<td>19.4%</td>
<td>14.5%</td>
</tr>
<tr>
<td>Lower Saxony-Bremen</td>
<td>14.1%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Cologne-Bonn-Köln-Ruhr</td>
<td>14.9%</td>
<td>9.5%</td>
</tr>
<tr>
<td>Thüringen</td>
<td>13.7%</td>
<td>10.6%</td>
</tr>
<tr>
<td>Bayern</td>
<td>31.4%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Central Germany</td>
<td>0.0%</td>
<td>4.8%</td>
</tr>
<tr>
<td>Southwest Germany</td>
<td>4.8%</td>
<td>4.8%</td>
</tr>
<tr>
<td>DTT core areas overall</td>
<td>12.8%</td>
<td>10.4%</td>
</tr>
<tr>
<td>Germany overall</td>
<td>5.3%</td>
<td>4.3%</td>
</tr>
</tbody>
</table>

Base: 33.904 million TV households in Germany
Source: GSDZ 10/2006
The range of services available varies from region to region.
Status per 24 October 2006
Source: www.ueberallfernsehen.de
In absolute data, some 330,000 households bought a new DTT receiver during the period June 2005 – September 2006, including some 40,000 in central Germany and some 70,000 in south-west Germany. Overall, the new DTT regions are below average.

An analysis of the age structure of DTT consumers shows that DTT viewers tend to be on the young side: Approx. two thirds of them are below 40 years of age. Of the number of television households overall, the younger consumers come to a share of 30 per cent only. First surveys on the introduction of DTT in Berlin had still shown a relatively large share of elderly TV viewers.

Digital terrestrial reception is concentrated around the major centres of the population, compensating the digital „undersupply“ which is attributable to the dominating cable reception and the limited possibility of fixing a satellite dish. In the countryside, consumers easily resort to DVB-S for digital reception.
6. The pay TV market

Subscribers to pay TV were the first to use digital transmission systems. Nowadays, consumers are attracted to switch to digital transmission by the number of channels available and the quality of transmission. The share between pay-TV and free TV has shifted accordingly with a slower increase in the number of digital pay TV households compared to the increase in digital free TV homes (see Fig. 8).

Pay-TV subscriptions reached 4.28 million subscribers by the middle of the year, according to the data given by the operators. Some 65 per cent of subscribers resort to cable services while some 35 per cent opt for satellite pay-TV.

Premiere continues to dominate the market with 3.4 million subscriptions, followed by the „Kabel Digital Home“ service package by KDG to some 500,000 customers. The package offered by Arena at the start of the 2006 Bundesliga season in August will only allow for qualified analysis in 2007. The company stated that it had some 800,000 orders in its books at the end of August 2006.

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Source: Goldmedia, based on company data.
7. Digitisation – the international picture

In the international digitisation league, Germany occupies a middle rank with the UK, Ireland, the Nordic countries, Italy and France holding the top positions. The large range of free-to-view services and the high market share of cable which already provided a wide variety of channels in the analogue word initially hampered the demand for digital television. However, with its large population, Germany ranks second as far as digital households in Europe are concerned, only topped by the UK where 17 million receivers are estimated to be in the market (see Fig. 9).

Fig. 9 Digitisation in Europe

Source: Screendigest, year-end 2005
In the UK, DTT is the mode of transmission which finds the widest acceptance among viewers, supplying 56 per cent of all households with TV services. Prior to terrestrial TV in the UK going digital, most viewers received only a small number of TV channels through the air. Additional services were available only via satellite or cable pay TV, which was driven mostly by market leader BSkyB via satellite. With a market share of just 14 per cent, cable plays only a minor role in the UK. As a result, digitisation took off very quickly, above all driven by pay services transmitted via satellite. The introduction of Freeview in 2002 which is transmitted free-to-view via DTT gave another boost to digitisation. According to research data published by the UK regulator, Ofcom, some 70 per cent of the British households had gone digital by mid-2006.

A similar situation as in the UK characterised the Nordic countries, where terrestrial transmission initially provided only a limited range of services. Digitisation was first driven by the pay-TV platforms offered via satellite and cable, but DTT now also contributes to the Scandinavian countries taking up digital TV via concepts offering a mixture of both pay-TV and free TV. In Sweden, the number of DTT homes exceeded 0.5 million by end-2005 while in Finland, some 0.6 million homes received digital terrestrial TV. Unlike in Germany, terrestrial TV still has the second-highest share in the market after satellite:Terrestrial TV supplies some 25 per cent of homes in Norway, 30 per cent of Swedish households, and 57 per cent of TV households in Finland. This provides considerable potential for the digitisation of terrestrial television.

In Austria, satellite reception takes up some 51 per cent of TV households, driving digitisation as the most popular mode of transmission. In the cable networks, on the other hand, the wide range of services available preserves the dominant position of analogue transmission. Services including internet (approx. 0.4 million customers) or telephony (0.2 million users) are far more popular among the 1.3 million cable homes than digital pay television (0.1 million customers). The start of DTT could provide a fresh impetus for DTT from 2007 onwards; however, the current market share of terrestrial television which captures only 12 per cent of TV households makes terrestrial transmission the least attractive mode of transmission providing little prima facie potential for digitisation.

The Italian TV market is almost completely supplied via satellite and terrestrial transmission respectively, the latter accounting for 74 per cent of all TV households as the most important mode of transmission. Both transmission platforms, however, have recently come up against competition from IP-TV services offered by the telecommunications industry. Digitisation is pushed by terrestrial TV, and the Italian government handed out considerable subsidies for receiver equipment, making DTT the fastest-growing mode of transmission. By end-2005, some 3.9 million households had gone digital, and DTT is expected to overtake digital satellite reception during 2006 which was used by some 4.5 million homes at the end of 2005. Apart from the wide range of free-to-view TV services, DTT is also helped by the pay--TV services providing pre-paid options as well as by exclusive and attractive sports rights.

The main incentive to opt for DTT reception, however, is probably the considerable extension of services via DTT and digital satellite which offers enormous attractions to Italian viewers as very few services are available only via analogue terrestrial transmission.
Methodology
The survey was conducted with computer-assisted telephone interviews (CATI) on the basis of the telephone random sampling system. The interviews were held during the period 11 September – 01 October 2006. The survey was carried out by TNS Infratest MediaResearch on the basis of the questionnaire developed in 2005 by TNS Infratest and Goldmedia GmbH in consultation with GSDZ. The overall population basis for the survey was represented by all German-language private households in Germany, with a projection based on the survey resulting in 35.77 million households. Of these, 95.3 per cent or 33.9 million households own a television set. These households form the basis for the following presentation of results.
The survey is based on a net number of 6,000 interviews. In each case, the interview was conducted with the person in the household stating that they knew best about television consumption and reception in the household. Of the 5,000 interviews, 2,500 interviews were conducted in proportion to the statistical data relating to the respective German state. In addition, the number was increased by 500 interviews each in the core areas of the seven core areas of DTT transmission in Germany, namely Berlin/Brandenburg, northern Germany (Schleswig-Holstein, Hamburg, Lower Saxony, Bremen), Northrhine-Westphalia (Cologne/Bonn, Ruhr area), the Rhine-Main area, Bavaria, southwest Germany and central Germany. These additional interviews provide more detailed information on the take-up of DTT in the various core regions.

Definition of cable and satellite reception
Television sets connected to a satellite master antenna system (SMATV) which require no separate receiver are counted as cable reception. In these households, the high-frequency satellite signals employed for transmission are converted into the low-frequency cable network in the SMATV network. The range of services available is pre-defined as is the case for customers supplied by level 3 network operators. Satellite reception therefore only comprises television sets using a satellite receiver. The rationale behind this definition is that the survey was devised to analyse reception from the viewpoint of the television households.

Establishing transmission platforms and transmission technologies
For each of the three television sets in the households investigated, all available transmission platforms were analysed. Households receiving both terrestrial and satellite services with the same set were included in both transmission categories for the gross analysis of television reception. This can result in a sum total exceeding 100 per cent in some cases, as shown in Fig. 2. Not included in the analysis are the 1.3 million PCs which can receive television.
In the analysis of the transmission technologies (analogue or digital), cable reception forms an exception: Television households with cable reception using a television set which is connected to a digital cable receiver tend to use the receiver for digital pay-TV reception only. The services available free-to-view are usually watched in analogue transmission mode. As this form of both analogue and digital reception does not exist for satellite or terrestrial transmissions, all cable television sets with a digital receiver are counted as digital receivers for the benefit of uniform presentation.
Commission on Digital Access

Who we are

In Germany, broadcasting and broadcasting regulation are organized at state level. The 15 German regulatory authorities who are in charge of the commercial broadcasting sector, cooperate in all national issues relating to the licencing and monitoring as well as the promoting and fostering of commercial broadcasting in Germany. To this end, they established the Directors’ Conference (DLM) and the association of regulatory authorities (ALM).

The advance of the new digital technology has brought with it new tasks, e.g., the handling of cable networks or the management and safeguarding of access to digital platforms for both public and commercial broadcasters. To deal with all of these issues, the DLM set up the Digital Access Commission.

The Digital Access Commission has made it its main objective to establish a network for all players and sectors relating to digital access through internal and external communications: It combines and coordinates the technical competence and experience of the regulatory authorities in this field. It acts as a contact for the industry and as a one-stop agency, thus cutting down on red tape and providing a service for all players. It also cooperates with the Federal Cartel Office and the Regulatory Authority for Telecommunications and Post, thereby underlining the federal character of broadcasting and broadcasting regulation in Germany.