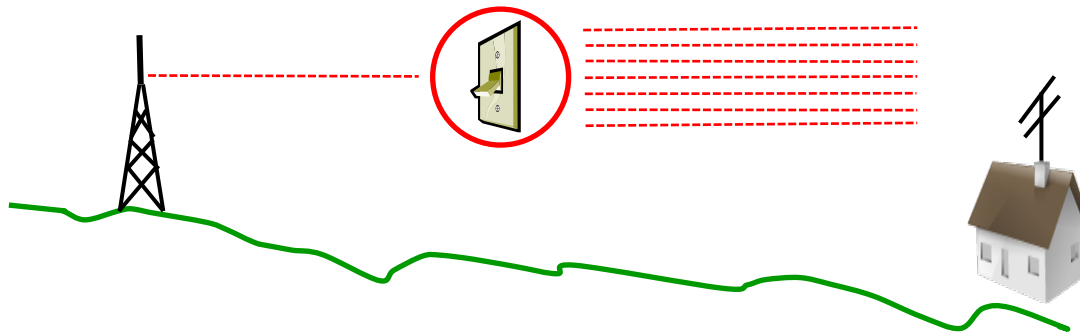
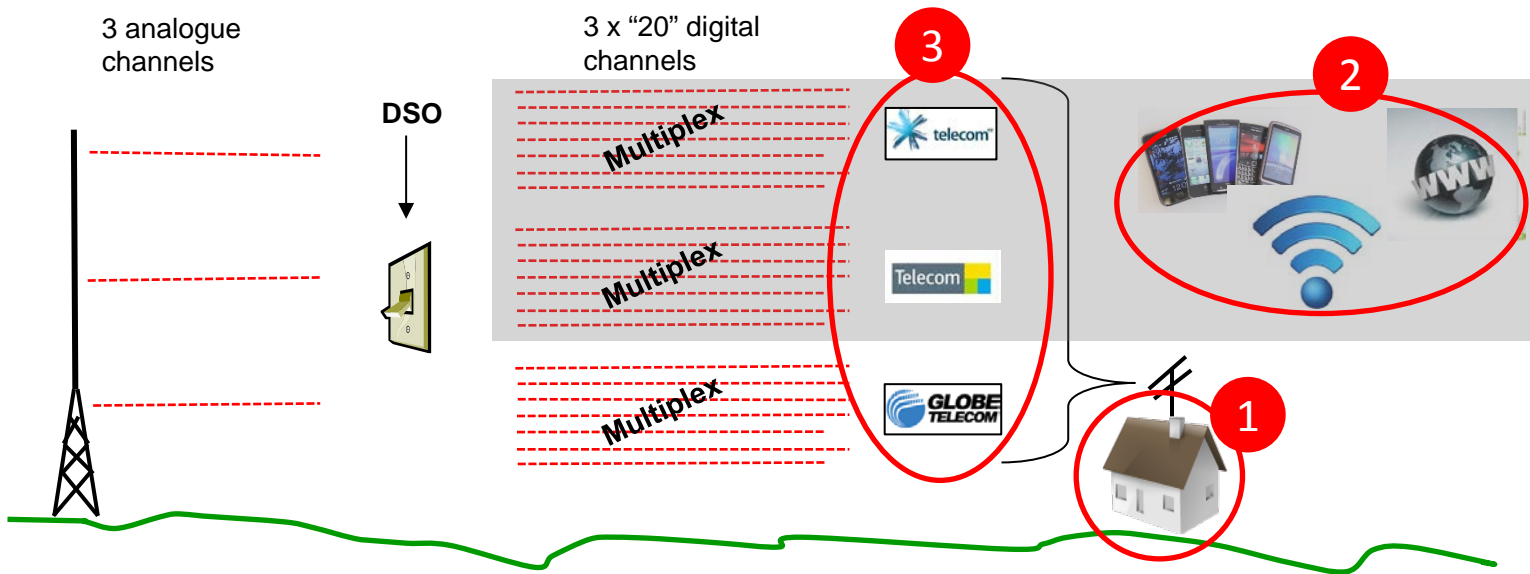


# Media Pluralism and The Digital Switch Over (DSO)



**Lessons learned from the Open Society  
Foundations' project 'Mapping Digital Media'.**

# What is the “Digital Switch Over” (DSO)? – Which potential benefits?



Switching from analogue to digital (combined with new compression technologies), expand the transmission capacity in the terrestrial networks.

## What are the potential benefits - The Digital dividend?:

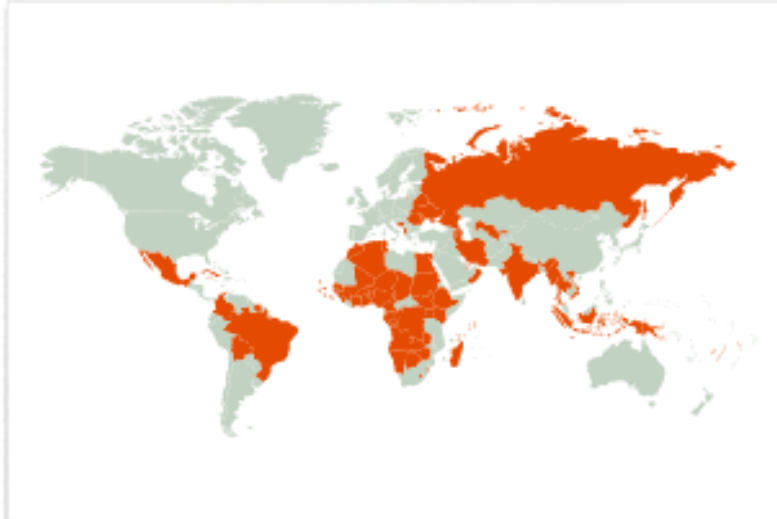
- More television channels ----->
- Freed spectrum for other wireless communication purposes (mobile telephony, broadband .....)
- Providing more space for (new) operators (Telecoms and TV stations) ----->

From a media pluralism perspective.

To what extent has the DSO resulted in:

- ▶ 1. a more diversified television offer to viewers?
- ▶ 2. more transmission capacity for societal rather than purely commercial purposes?
- ▶ 3. a more open transmission market challenging old (state) monopolies – and incumbent operators?

## Ongoing



Albania, Algeria, Angola, Armenia, Azerbaijan, Bahrain, Belarus, Benin, Bolivia (Plurinational State of), Bosnia and Herzegovina, Botswana, Brazil, Burkina Faso, Burundi, Cameroon, Cape Verde, Chad, Colombia, Congo, Côte d'Ivoire, Cuba, Dem. Rep. of the Congo, Egypt, Equatorial Guinea, Ethiopia, Fiji, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, India, Indonesia, Iran (Islamic Republic of), Kenya, Lesotho, Madagascar, Mali, Mexico, Moldova, Morocco, Myanmar, Namibia, Niger, Nigeria, Oman, Papua New Guinea, Qatar, Romania, Russian Federation, Samoa, Senegal, Seychelles, Sierra Leone, South Sudan, Sudan, Suriname, Swaziland, Thailand, Togo, Tunisia, Uganda, Ukraine, Uzbekistan, Viet Nam, Zambia, Zimbabwe

## Completed



Andorra, Australia, Austria, Belgium, Bulgaria, Canada, Croatia, Cyprus, Czech Rep., Denmark, Estonia, Finland, Former Yugoslav Republic of Macedonia, France, Georgia, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Japan, Korea (Rep. of), Latvia, Lithuania, Luxembourg, Malawi, Malta, Mauritius, Monaco, Mongolia, Montenegro, Mozambique, Netherlands, New Zealand, Norway, Poland, Portugal, Rwanda (Republic of), Saudi Arabia, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Tanzania, United Arab Emirates, United Kingdom, United States, Vatican

# Open Society Foundations' Mapping Digital Media Project

The Mapping Digital Media project (2007-2014) examined the impact of media digitization on journalism, democracy, and freedom of expression in 56 countries

All country reports and 20 thematic reports have been published on the Internet, see: <https://www.opensocietyfoundations.org/projects/mapping-digital-media>

The final report presenting the “Global Findings” as a cross country survey was published in 2014.

- Chapter 7, “Distributing the Digital Dividend” covers to what extent the “digital switch over” from analogue to digital terrestrial broadcasting has influenced media pluralism.

Eastern Europe, 18 reports	
Armenia	Bosnia & Herzegovina
Czech Republic	Poland
Slovakia	Macedonia
Estonia	Moldova
Bulgaria	Albania
Slovenia	Hungary
Croatia	Latvia
Russia	Serbia
Romania	Lithuania



<https://www.opensocietyfoundations.org/reports/mapping-digital-media-global-findings>

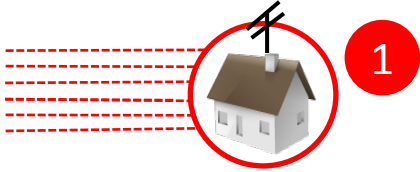
## What are the lessons learned from the MDM-project?

Three key findings – here presented in a rather rude and simplified fashion

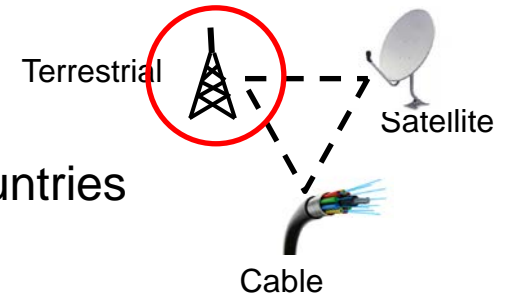


## In most countries the DSO has provided the viewers with “more of the same”

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For the terrestrial-only households, the DSO has in most countries brought many more television channels.



However:

1. Most of the new television channels are parallel broadcast of channels already available on satellite and through cable.
2. These “new” channels are typically commercial / international channels providing little content of national origins.
3. Only in a few countries (primarily North-western Europe), concessions of new channels have been given on the condition that they should be used to provide new content and/or, that local communities should be catered for.

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**Conclusion no. 1:** The DSO has – from a citizen / viewer’s perspective - not contributed much to media diversity and pluralism in the television offer.

# Will terrestrial transmission (DTT) be squeezed by wireless broadband?

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15 years ago, it was feared by national operators, especially Public Service Media, that the DSO would result in the loss of direct access to the viewers – and of national control of “the airwaves”.

However:

1. The first ITU planning of the DSO secured the necessary bandwidth for DTT.
2. Contrary, recently revised plans seem to reserve the hitherto DTT bandwidth (the 700 MHz band) for the fast expanding, and commercially more interesting wireless broadband, giving transnational “gate keepers” control of the access: The end of Free-to-air television?
3. On the other hand this “threat” must be weighed against the benefits (also of a broader societal kind) from new wireless technologies and the growing use of “on demand services”, potentially in the long run making broadcast more or less obsolete.

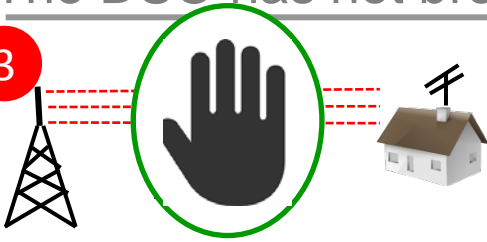
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**Conclusion no. 2:** It’s a mixed case with pros and cons. Media pluralism might be at stake concerning loss of national/local control of access.

# The DSO has not brought new operators and more competition to the market

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3



The scarce resource of bandwidth in the terrestrial network (radio and television) is usually owned by the state and controlled by the government. In the analogue era this power has often been misused in licensing procedures to favor politicians themselves and/or their close allies in big business.

One of the hopes of the DSO was to break this pattern and establish a transmission market with more competition by open and transparent tender procedures.

However:

1. Although planned licensing procedures and formal rules of the DSO often looks fine on paper, the tender and concession processes have been conducted in a very opaque and often corrupt way.
2. Very seldom have civil society and broader societal interests been consulted and involved.
3. In most countries (again with Northwestern Europe, USA and Japan as exceptions) it has resulted in government favoritism toward incumbent actors blocking the entrance of new independent operators.

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**Conclusion no. 3:** The DSO has not established a more competitive television market, neither concerning the operation of TV-channels nor transmission

# How do we explain the shortcomings?

## 1. Why have the potential benefits for civil society and media pluralism not been obtained?

- The initiative and the whole drive behind planning and executing the DSO came from the tele industry and authorities dealing with business development.
- Providing bandwidth for more television channels was given a low priority. The main objective was to expand spectrum for the commercially oriented growth of wireless broadband capacity.
- Only in very few countries has civil society been involved and able to advance media pluralism as an important consideration.



## 2. How do we explain the difference between the very few countries, where the DSO to some extent has contributed to media pluralism – and the vast majority where it didn't?

- It is only partly (if at all) related to differences concerning the text of plans and regulatory laws.
- Rather it has to do with different political cultures regarding the relation between government, civil society and its citizens.



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Thank you for your attention

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