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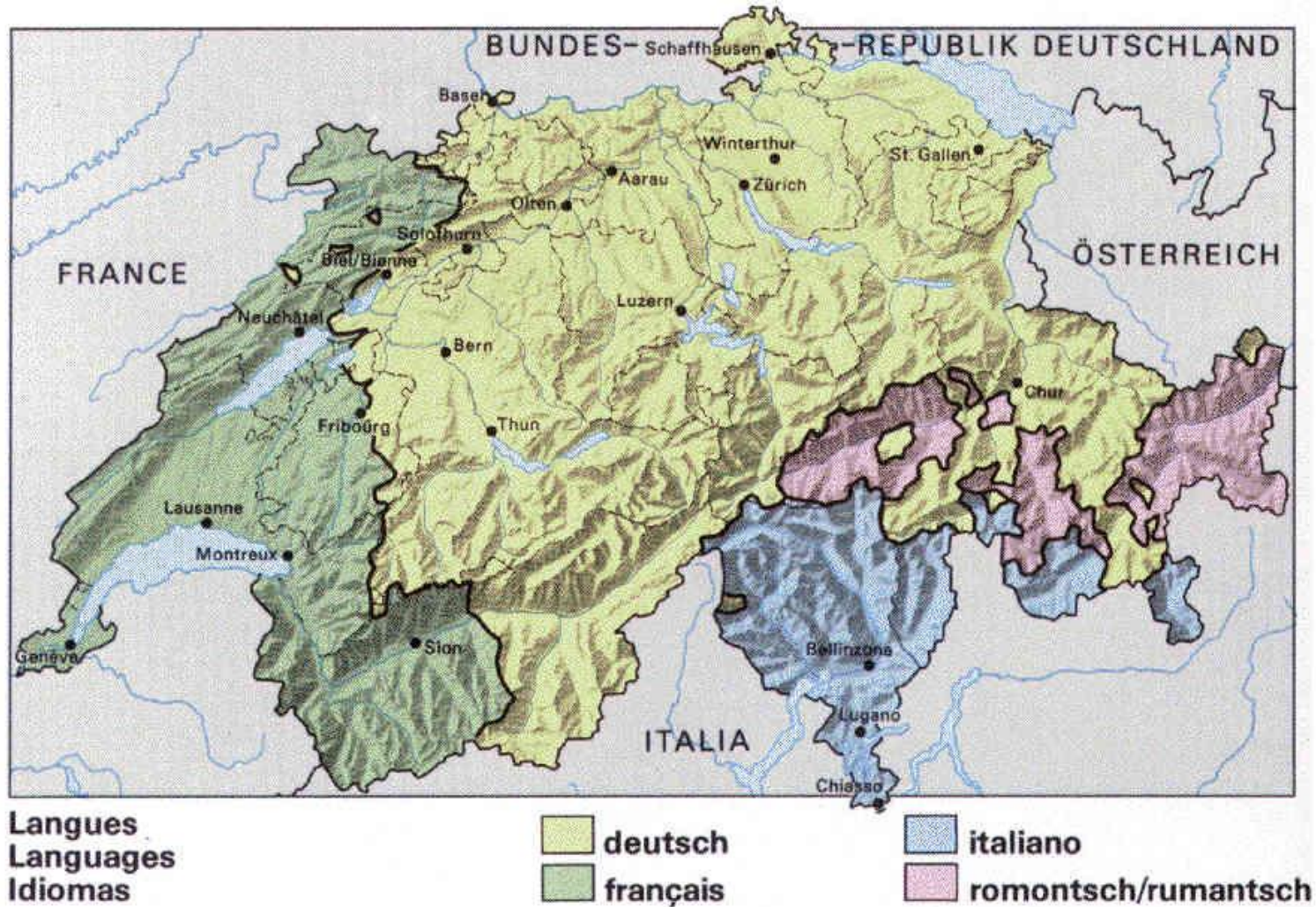


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The Swiss Media Landscape



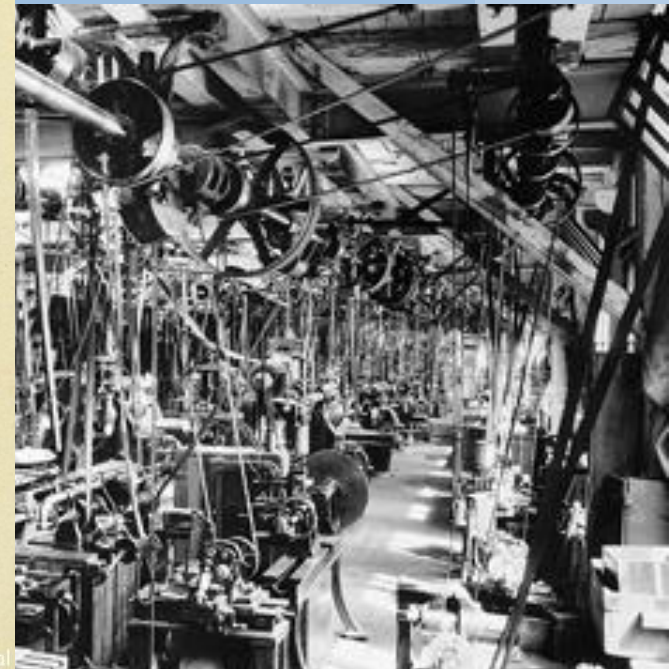
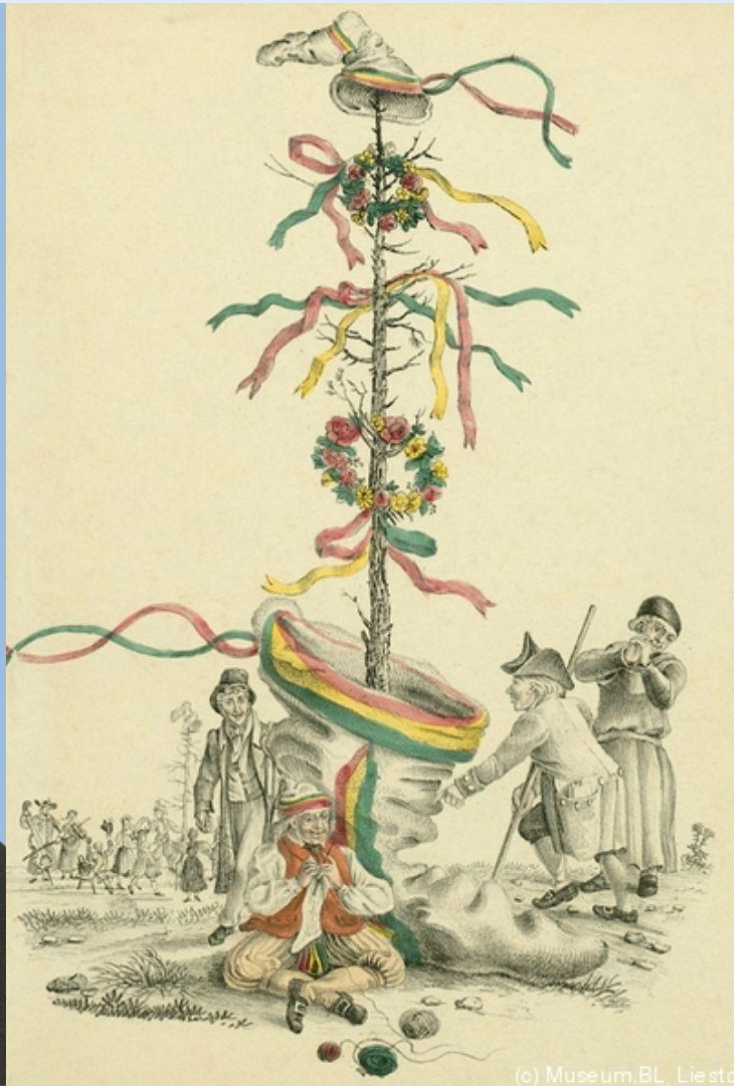
A country with four languages



Massive foreign media influence



A country with an occidental tradition



A country with direct democracy



A federalist country with central media regulation



State regulation:

- > **Federal Office of Communication (OFCOM):** regulation of radio, tv, telecommunication, post (EPRA-member)

Independent public regulation:

- > **Independent Complaints Authority (ICA):** complaints against radio and tv programs (EPRA-member)
- > **Competition Commission (COMCO):** media concentration
- > **Federal Communications Commission (ComCom):** regulation of telecommunication market



Audiovisual public service in Switzerland





Audiovisual public service in Switzerland

Art. 93 of the Federal Constitution:

- > Education, cultural development, free shaping of opinion, entertainment
- > Particularities of the country, needs of the Cantons, diversity of opinions
- > Independence, autonomy on programming, other media

Structure of public service:

- > Main actor: SBC (SRG SSR)
 - share of reception fees: >1.2 bn CHF
 - radio and television programmes in german, french, italian and rhaeto-romanian
 - international presence: TV5 Monde, 3 Sat, tvsvizzera.net, swissinfo.ch
- > Private radio and television broadcasters
 - share of reception fees: 54 m CHF
 - 42 radio and 13 television broadcasters entitled to a license / public service mandate





Role of the SBC





Role of the SBC

- > Largest audiovisual enterprise of Switzerland
- > Structure of financing: reception fees 75%, advertising 25%
- > Concentration of funds and inter-regional solidarity
- > Quality content, identitary and integrative role
- > Promoter of new audiovisual technologies





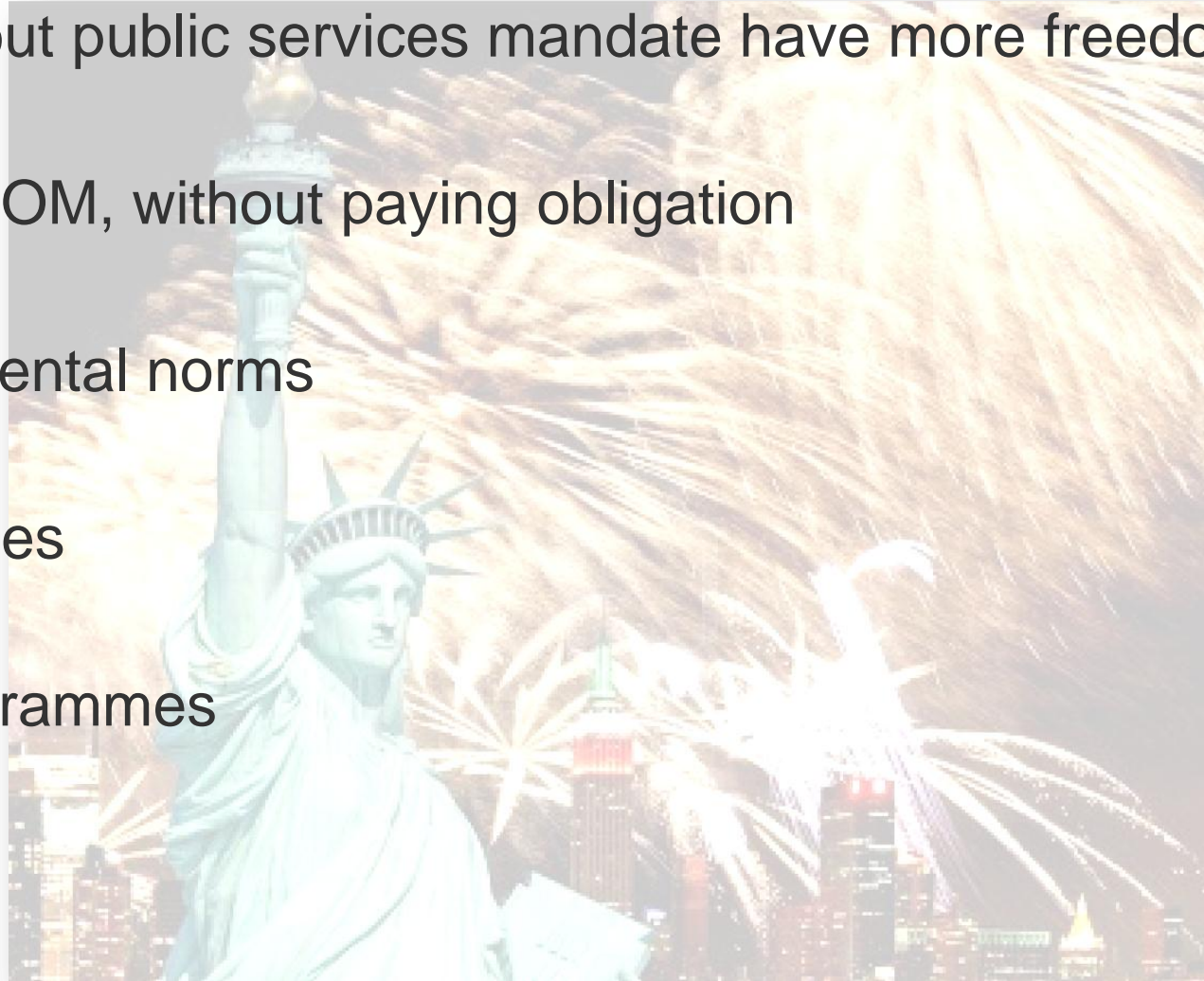
Other broadcasters: liberal regime





Other broadcasters: liberal regime

- > Broadcasters without public services mandate have more freedoms
- > Notification to OFCOM, without paying obligation
- > Respect of fundamental norms
- > 53 radio programmes
- > 138 television programmes



Swiss television broadcasting networks



Swiss television broadcasting networks

- > End of analogue cable broadcasting by 2015
- > Profile of networks by households:
 - 85 % of households with cable connection
 - 40 % of households with IPTV reception
 - OTT services are popular (Zattoo, Wilmaa)
- > Little relevancy of satellite and terrestrial television reception:
 - Satellite: 15 % of households
 - DVB-T: 2 to 3 % of households
- > Large offering of unencrypted programmes:
 - Varies between 70 and 200, according to offering

Swiss radio broadcasting networks





Swiss radio broadcasting networks

- > Difficult topography for terrestrial reception
- > Big trend towards digitisation:
 - 98% of the population covered by DAB+ (SBC)
 - approx. 70 programmes on DAB+
 - urban DAB+ «islands» covered by alternative radios
 - 2 million DAB+-receivers sold
- > Swiss radio sector aims at switching off FM between 2020 and 2024

