PANORAMIC

TELECOMS & MEDIA 2025

Contributing Editors

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Simmons & Simmons

LEXOLOGY

Telecoms & Media 2025

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Panoramic guide (formerly Getting the Deal Through) enabling side-by-side comparison of local insights into local regulatory framework, foreign ownership restrictions and licensing requirements; spectrum use considerations; ex ante regulatory obligations; structural / functional separation considerations; universal service obligations; number allocation and portability; customer terms and conditions; net neutrality; platform regulation; next-generation access (NGA) networks; data protection and cybersecurity issues; big data; local storage requirements; foreign programmes and local content requirements; advertising; must-carry obligations; regulation of new media content; digital switchover; media plurality; regulatory agencies, competition law, and appeals; and recent trends.

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Telecoms and Media: Introduction

Alexander Brown and David Trapp

Simmons & Simmons

The media and telecommunications industries continue to change and adapt to advancements in technology, consumer information consumption habits and – quite pertinently – the social and economic environment. As businesses seek to adapt, so too do the laws and regulations in these sectors that aim to remain appropriate, applicable and useful.

Telecoms and Media seeks to provide an assessment of the relevant legal and regulatory environment, setting out each market's regulatory framework, as well as the practical implications of how those regulations affect service providers and end users equally. In addition to outlining any significant events over the previous year, *Telecoms and Media's* responses also emphasise any potential future developments and any proposed plans for change.

Media and telecommunications remain an essential part of consumer lives and, accordingly, these industries are frequently highly regulated and subject to intricate competition law regulations. In addition to these regulatory oversights, *Telecoms and Media* also considers laws that are not specific to these industries – like cybersecurity, data protection and online safety laws, and how these may affect the media and telecom sectors.

Telecoms and Media seeks to provide a comprehensive overview of a wide range of areas within these industries, from mobile communications to broadband connectivity for telecoms, and from newspapers to online video content for media. By avoiding a narrow focus on one or two segments of these industries, this publication provides a more complete understanding of the complex regulatory landscape.

The last two years has seen the explosion of development and adoption of AI technology and specifically generative AI technology. AI is and will increasingly transform our work, communication and interactions as a society. It requires careful regulation so as to address the risk associated with high-risk AI systems or deployments of AI technology while at the same time fostering innovation. The European Union has led the way in terms of comprehensive AI regulation through its AI Act and many other countries are addressing AI regulation or actively considering their stance on AI regulation.

The UK communications regulator, Ofcom, continues to adapt its existing regulatory framework to oversee the use and implications of AI across its regulated sectors. Outlined within Ofcom's published Strategic Approach to AI for 2024/25, this document details Ofcom's regulatory approach to services utilising AI, including exploring Ofcom's process for identifying and mitigating current AI risks, and setting out Ofcom's future AI work and global collaboration. The overarching theme of Ofcom's strategic approach emphasises the importance of harnessing the extensive benefits AI has to offer, whilst effectively mitigating

its associated risks within the parameters of the United Kingdom's pro-innovation approach to AI.

Online harms and safety as well as consumer protection related to online services is another key regulatory priority in a number of countries. Examples include the EU's Digital Services Act and the UK's Online Safety Act. The Digital Services Act aims to create a safer digital space in the European Union by setting clear standards for accountability and transparency among online platforms, ensuring they mitigate risks and protect users from illegal content. Similarly, the UK's Online Safety Act focuses on compelling companies to take responsibility for the safety of their users, particularly children, by enforcing stringent measures against harmful content and activities online. These acts illustrate an increasingly proactive stance taken by regulators to safeguard the digital ecosystem, promoting a secure and trustworthy online environment.

In the competition space, we have seen a number of notable developments:

- Politicisation of merger review: The Competition and Markets Authority (CMA) has come under broad political pressure to support and contribute to the overriding national priority of the government: economic growth, as underscored by the replacement by the government of the CMA Chair. The CMA has launched a review into its merger review processes and remedies policy in light of this growth imperative. It is to be seen whether this environment results in a more business-friendly and predictable regulation of the M&A space. In the meantime, the CMA clearance of the merger between Vodafone UK Limited and Hutchison 3G UK, subject to behavioural remedies, signals a potential shift in CMA approach to market consolidation, with a greater willingness to consider remedies that lock-in consumer benefits or rivalry-enhancing efficiencies.
- Conclusion of the first competition collective action trial in the UK: The prominence of class actions in the UK is more evident than ever, particularly in the telecommunications sector. Recent years have seen an explosion in high-profile collective competition damages actions, often pursued on a 'standalone' basis (not relying on an infringement decision from a competition law regulator). While we are still in the relatively early days of the class action regime, BT's successful defence of a >£1.3bn claim could prove to be a seminal case, as the first opt-out competition collective action to go to trial in the UK. The question now is whether BT's success impacts upon the appetite to bring (and fund) analogous standalone claims, and whether there is any dampening in the rate of competition collective actions being brought in the Competition Appeal Tribunal.
- Regulatory scrutiny of AI: The CMA has shown a keen focus on AI, mirroring the growing importance of this technology in shaping the future of telecommunications and media. The CMA's joint statements with international counterparts highlight the need for fair competition in the AI ecosystem, arguing that innovation should not be stifled by powerful market players. This focus is part of a broader regulatory effort to balance technological advancement with market fairness from the outset, and is reflected in the CMA's scrutiny into a number of collaborations between large tech firms and AI developers.
- New digital market regime: The introduction of the Digital Markets, Competition and Consumers Act 2024 marks a significant regulatory shift, giving the CMA ex-ante powers to oversee digital markets and protect consumers. The Act aims to foster

a competitive environment by holding digital firms with 'strategic market status' accountable and preventing anti-competitive practices. This legislative change is expected to have far-reaching implications for how digital markets operate in the UK, and the CMA has foreshadowed its expectation that the regime can be used in place of existing powers to resolve competition concerns: for example, following the conclusion of its Mobile Browsers and Cloud Gaming market investigation. It remains to be seen how this regime works alongside the UK government's drive for economic growth; with the CMA's first 'strategic market status' investigations only launched at the start of 2025.

In the wider geo-political sphere, this year has also seen the continuation and escalation of unrest around the world, including the Russia-Ukraine war and the Israel-Gaza conflict. Apart from the humanitarian crisis that these conflicts represent, they continue to present economic and business challenges, including the escalation of trade tensions and disputes between major economies. The results of the 2024 United States election cycle and the Trump administration's trade and foreign policies have introduced tension and additional uncertainty into regulatory and foreign policy frameworks, that will influence international trade and technology related markets and their regulation in the coming years.

In short, the telecommunications and media sectors are at a crossroads, with mergers, regulatory changes, and technological advancements driving significant transformation. As these trends unfold, industry players must navigate a complex landscape, balancing innovation with compliance to thrive in this evolving environment.

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The major statutory instruments setting out the regulatory framework for the provision of electronic communications networks (ECNs) and electronic communications services (ECSs) in Bulgaria are the Electronic Communications Law (ECL), the Roaming Regulation (EU) 2022/612 and the Net Neutrality Regulation (EU) 2015/2120, complemented by a number of other statutory instruments, such as the Electronic Communication Networks and Physical Infrastructure Law (ECNPIL), regulating the deployment and use of electronic communications networks and transposing Directive 2014/61/EC. Secondary legislation issued by the regulator in this field, the Communications Regulation Commission (CRC), includes the General Requirements for Provision of Public Electronic Communications (detailing the rights and obligations of electronic communications providers), the Rules on the Minimum Security Requirements for Public Communications Networks and Services and the Methods of Security Risk Management (regulating security measures and incident reporting), etc. These main pieces of legislation are also supported by numerous horizontal and sector-specific legislative instruments such as the Personal Data Protection Law, the Technical Requirements to Products Law, the Electronic Commerce Law, the Supply of Digital Content and Digital Services and the Sale of Goods Law, the Accessibility Requirements for Products and Services Law (ARPSL), the Consumer Protection Law and the Competition Protection Law. Following the amendments to the ECL that took place in March 2021 and the subsequent amendment to the pertinent secondary legislation, from 15 May 2023, Bulgarian law is harmonised with Directive (EU) 2018/1972 establishing the European Electronic Communications Code (EECC). A new development since 2023 is the planned inclusion of online intermediary services under the supervisory powers of the CRC, which will also be designated as the Digital Services Coordinator under Regulation (EU) 2022/2065 (the Digital Services Act).

The government policy in the sector is implemented by the Bulgarian government (the Council of Ministers), the National Radio Frequencies Spectrum Council, the Minister of Transport and Communications and the Minister of Electronic Government. The Bulgarian national regulatory authority is the CRC, which acts in cooperation and coordination with other authorities such as the Bulgarian Commission for Protection of Competition (which has the primary responsibility for enforcement of fair competition rules), the Council of Electronic Media (the regulator in the area of audio-visual media services) and the Personal Data Protection Commission (which has been entrusted with the regulation and control of the processing of individuals' personal data).

According to the Law on the Economic and Financial Relations with Entities Registered in Jurisdictions with Preferential Tax Treatment, their Controlled Entities, and their Beneficial Owners, companies registered in a jurisdiction with preferential tax treatment, as well as their controlled entities, are not eligible to acquire ownership participation in electronic communications provider, if the percentage of participation confers 10 per cent or more of the voting rights, as well as to participate (directly or indirectly) in procedures for granting

a permit for the provision of electronic communications networks and (or) services unless certain conditions are met.

In 2024, Bulgaria introduced a new foreign direct investment (FDI) screening mechanism which applies to non-EU investors, including EU companies controlled by non-EU persons or entities. The economic activities covered by the FDI screening include,inter alia, critical communications infrastructure. The statutory thresholds triggering the screening are as follows:

- investment exceeding €2,000,000 or resulting in the acquisition of at least 10 per cent of the capital of the target operating in Bulgaria;
- the investment results in acquiring at least 10 per cent of the capital of the target operating in the high-tech sector in Bulgaria; or
- new investment exceeding €2,000,000.

The FDI screening regime mandates that foreign investors should notify the planned investment and refrain from implementing the investment until receiving clearance by the Screening Council (intra-governmental body vested with the power to review FDI notifications). The notification process involves a two-step review, subject to specific deadlines, which culminates in either an express conditional or unconditional clearance, a tacit unconditional clearance, or an express prohibition. As of April 2025, the FDI screening regime has not yet been activated pending the adoption of secondary legislation by the Bulgarian Council of Ministers.

On 11 April 2025, the ARPSL was promulgated in the State Gazette. The legislation transposed Directive (EU) 2019/882 and applies also to accessibility requirements for electronic communications services. The CRC is designated as the supervisory authority for communications services. The ARPSL is effective as of 28 June 2025.

Law stated - 2 May 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

Following the transposition of the EECC, public ECNs and (or) ECSs (ECN/S) can be provided freely, after submission of a notification to, registration with, or issuance of a permit for the use of scarce resources (eg, frequencies, the position of the geostationary orbit with the corresponding radio frequency spectrum or numbers from the National Numbering Plan) by the CRC.

No notification, registration, or issuance of a permit is required for the provision of number-independent interpersonal communications services, for access to public ECN through a local radio network of companies, not-for-profit organisations and end users, for which the provision of such access is not part of economic activity, but merely supplements economic activity or for public service that is not dependent on the transfer of signals via such networks. Electronic communications for own use through ECN without the use of a scarce resource are carried out freely, as well.

The notification procedure is straightforward and free of charge. It normally takes about 14 days for the CRC to review the notification and to enter the undertaking with the register of the undertakings that have notified the CRC about their intention to provide ECN/S. The rights and obligations of the electronic communications provider arise from the date of the duly filed notification and are not limited in time. Providers carrying out electronic communications under the notification regime must comply with a set of ongoing compliance obligations and requirements that depend on the type of network or services provided (eg, certain technical, reporting, procedural, data protection, retention, consumer protection, law enforcement obligations, etc). Providers operating under such authorisation have the obligation to inform the regulator within 14 days of any change to the data stated in the notification and may terminate the provision of electronic communications upon submission of a notification to that effect to the CRC.

The amendments of the ECL in 2021 introduced a new regime for the use of individual spectrum rights. The relevant spectrum, the use of which is subject to registration, the technical parameters for the operation of the networks, the related registration procedure, and the designated registry kept by the CRC are all set forth in the Rules for Use of Radio Frequency Spectrum Following Registration. The register is public and can be accessed on the CRC's website. The term of use of such resource under registration is up to 20 years from the date of registration. The registration of the entities having the right to use said spectrum is made by the CRC, following an application with the CRC information portal. The regulator carries out the registration within 20 days of the submission of the application or the correction of the identified inaccuracies and (or) incompleteness. The CRC shall issue a certificate of registration upon the express request of the registered entity. The registered entity shall ensure effective use of the spectrum allocated to it by using the spectrum bands within six months of their entry into the register. Entities shall pay fees as set out in the Tariff for Fees Collected by the CRC under the ECL. The CRC shall de-register the entity upon the explicit request of the latter. The registration regime for the use of spectrum is mostly relevant to the deployment of mobile base stations.

Where the provision of electronic communications is subject to authorisation for use of the individually allocated scarce resource electronic communications shall be carried out upon the issuance of a permit by the CRC.

The permit for use of individually allocated spectrum shall be awarded either:

- on a competitive basis, where the number of applicants exceeds the number of entities that can obtain permits for the available spectrum; or
- without an auction or tender, in a limited number of cases, including, among others:
- where the number of applicants is lower or equal to the number of entities that may be granted a permit for the available spectrum;
- for carrying out electronic communications through the use of analogue ECN for terrestrial analogue radio broadcasting; and
- for carrying out electronic communications for the entity's own use.

Where the provision of ECN/S requires the use of scarce resource – numbers – the permit shall be granted without auction or tender.

Bulgarian telecommunications law is technology-neutral and therefore the authorisation regimes (notification, registration, permit for use) are based on the use (or not) of a specific scarce resource, rather than based on the type of services (fixed, mobile, satellite) or a particular mobile technology (2G, 3G, 4G). A distinction in spectrum allocation for mobile, fixed and satellite usage is made in the State Policy on Planning and Allocation of the Radio Frequency Spectrum adopted by the Council of Ministers. The National Plan further allocates radio frequency bands, distinguishing between mobile, fixed and satellite usage.

A permit for the use of a scarce resource (irrespective of whether spectrum or numbers) is granted for an initial period of up to 20 years, except for the permit for the use of harmonised spectrum for wireless broadband services whose initial term is not less than 15 years with the option for prolongation up to 20 years. Apart from the statutory obligations relevant to all electronic communications providers, the holders of permits for the use of an allocated resource must comply with the obligations imposed by the terms and conditions of the permit. The permits can be amended and supplemented under the request of the holder or under a CRC motion and on the grounds provided for by the law (eg, including, among others, changes in the applicable laws, reasons related to the public interest and aiming at efficient use of scarce resources, protection of consumers' interests and ensuring universal service). The CRC may also withdraw the authorisation where the provider fails to comply with the terms of the permit, has committed systematic violations and systematically fails to pay the fees due with regard to the allocated resource, as well as in some other cases explicitly set forth in the law.

Undertakings carrying out electronic communications have to pay:

- an annual fee for the CRC's controlling activities of up to 1.2 per cent (for 2025, the charges are set at 0.291 per cent for undertakings with an annual gross income of over 100,000 Bulgarian leva) or zero per cent (for undertakings with an annual gross income of below 100,000 Bulgarian leva, while in April 2025 the authority announced a reduction of the supervisory fee to 0.265 per cent for 2026) over the annual gross income from the provision of ECN/S, value added tax not included and following deductions as provided for by the law which is subject to revision by the CRC annually; and
- a one-off fee for administrative services.

In addition, undertakings using individually allocated scarce resources have to pay:

- an annual fee for the use of such resource (the amount of the annual fee for the use of an individually allocated scarce resource shall be determined on the basis of criteria set forth by the law, such as territorial coverage of the permit, term of spectrum use (in respect of radio frequencies), availability and economic value of numbers from particular number ranges (in respect of numbers), etc; and
- a one-off fee for granting, amendment or supplement of a permit for use of such resource.

Law stated - 2 May 2025

Flexibility in spectrum use

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3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

Spectrum may be used freely, after registration or after obtaining a permit. Spectrum registration and spectrum permits grant individual rights for the use of spectrum, and these generally specify the permitted use. Spectrum registration is not tradable or assignable.

Bulgarian law allows the transfer of a spectrum permit or part of the rights and obligations pertaining to the permit, for the full or part of the allowed territorial scope, and for the full or part of the allowed use term, as well as the lease of the individually allocated spectrum, after the prior approval of the CRC. The CRC shall issue such approval if the contemplated transfer or lease would not negatively affect competition or lead to changes in the conditions of spectrum use. Specific requirements related to the transfer of a permit are set forth in the secondary legislation adopted by the CRC.

Law stated - 2 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

The ECL contains specific provisions that aim to prevent operators with significant impact on the market from engaging in anticompetitive practices. These provisions are enforced by the CRC, whose task, among others, is to define and periodically analyse the relevant markets for network infrastructure and communication services with the aim of determining whether effective competition exists. The CRC conducts the analysis in accordance with the methods and principles of the competition law (namely, effective competition is deemed to be absent if one or more undertakings have significant market power (SMP) in a relevant market). In line with article 63(2) of the EECC, the ECL defines SMP as a position equivalent to dominance (namely, a position of economic strength vesting in a single undertaking (or a group of undertakings) the power to behave to an appreciable extent independently of competitors, customers and ultimately consumers).

In 2022, the CRC completed its fifth round of market analysis of the relevant wholesale markets for call termination and defined that there are no markets that should be subject to ex-ante regulation. In the same year, the CRC reviewed the wholesale market for reserved capacity and confirmed its decision that the market is not susceptible to ex-ante regulation. The wholesale market for local access was deregulated in 2019 and was due for a review by the end of 2024. The CRC has committed to complete its review of the wholesale local access market by June 2025; there is no publicly available draft as of April 2025.

The CRC's reasoning is that the three criteria for the definition of a market as a relevant market subject to ex-ante regulation are not satisfied with respect to any of the telecommunication markets. For clarity, the ECL similarly to the EECC outlines the following three criteria:

- high and non-transitory structural, legal or regulatory barriers for entry into the market;

- a market structure that does not tend towards effective competition within the relevant time horizon, having regard to the state of infrastructure-based competition and other sources of competition behind the barriers for entry; and
- competition law alone is insufficient to adequately address the identified market failure.

It should be mentioned that as a result of its fourth market analysis of the relevant markets that took place in 2020, the CRC had defined the market for wholesale call termination on individual public telephone networks provided at a fixed location (market No. 1 of the 2014 Market Recommendation) and the market for wholesale voice call termination on individual mobile networks (market No. 2 of the 2014 Market Recommendation) as markets that should be subject to ex-ante regulation and had imposed specific measures to be observed by each of the entities active on these market that were considered to have SMP. The measures included, among others, the obligations for the provision of access to and use of essential network elements and facilities, including the provision of internet protocol (IP)-based interconnection, transparency, non-discrimination as well as price restrictions, including cost-oriented pricing for termination of national calls and calls originating from EU or EEA countries. To ensure consistency in regulatory conditions, following the deregulation of the wholesale market for fixed call termination, in 2023 the CRC adopted a position regarding the provision of IP-based interconnection. The position, which is a soft-law document, states the intention of the CRC when deciding disputes between operators to apply the rules for IP-based interconnection formerly imposed after market analysis.

The CRC adopted a revision of the Ordinance on the conditions and procedures for access and/or interconnection (the Ordinance on access and interconnection). The Ordinance on access and interconnection provides that operators whose networks are used to provide public electronic communications services are under obligation to negotiate interconnection. The Ordinance on access and interconnection provides further obligations when interconnection is used for the purpose of connecting telephone networks. The interconnecting undertakings should have notified the CRC of the provision of the services for which they requested interconnection. The Ordinance on access and interconnection provides further obligations applicable to the provision of call termination and transit to ported numbers. The secondary legislation guarantees equal treatment of operators in terms of price, information and other conditions. It is envisaged that any difference in the terms and conditions offered to individual undertakings should be based on objective criteria. In this way, the potential for problems preventing end-to-end connectivity for end users is effectively eliminated.

Bulgaria transposed Directive 2014/61/EU of the European Parliament and of the Council of 15 May 2014 on measures to reduce the cost of deploying high-speed electronic communications networks by adopting the ECNPIL. When transposing Directive 2014/61/EU into Bulgarian legislation through the ECNPIL, ex-ante regulation of all network operators regarding access to and sharing of physical infrastructure in Bulgaria has been introduced and Bulgaria has exceeded the minimum requirements of the Directive. The ECNPIL imposes obligations on network operators to offer access to and (or) sharing of their physical infrastructure under a written contract and comply with the general terms and conditions they adopt, which are publicly available, with access prices being part of the minimum mandatory requisites of the general terms and conditions. The latter should also include the pricing mechanism for the determination of the prices for access or sharing

of physical infrastructure. The prices set by the network operators and the mechanism applied by them should be in line with a pricing methodology under the ECNPIL, which was adopted by an ordinance, issued by the Minister of Transport, Information Technology and Communications. The CRC is the designated dispute resolution body under the ECNPIL. The subject of the dispute may also be the content of adopted general terms and conditions. If requested by a network operator, the CRC may issue a decision and give binding instructions in cases of non-compliance with the set prices and technical conditions for access to the passive infrastructure. The application of the ECNPIL was one of the main arguments for the deregulation of the market for wholesale local access. The ECNPIL was amended in April 2025 exempting certain infrastructures used in mobile networks from building permissions, with the goal to stimulate network roll-out and the achievement of the gigabit connectivity goals.

The ECNPIL should be amended again later in 2025 to be brought in line with the entry into force of the EU Gigabit Infrastructure Act. As of April 2025, no draft has been published.

Between 2022 and mid-2024, electronic communications markets in Bulgaria were not subject to asymmetric regulation where undertakings with SMP are required to comply with a set of specific obligations. The CRC attempted to reverse that trend and on 30 July 2024 adopted Decision No. 220 on definition, analysis and assessment of the wholesale market for access to passive (physical) infrastructure. The CRC found that the market under consideration should be subject to ex ante regulation and as a result of the market analysis, the CRC concluded that there is no effective competition in the relevant market. The CRC identified Vivacom Bulgaria EAD (Vivacom) (the major fixed operator) as having SMP on the wholesale market for access to passive (physical) infrastructure. The full set of specific obligations was imposed on the undertaking – access, transparency, non-discrimination, publication of a reference offer and cost orientation of prices. With that decision, the CRC effectively reinstated the regulation which was withdrawn in the last market review of the wholesale market local access market in 2019. Upon appeal the decision was suspended until the final decision of the court, and the case is still pending.

Shortly after the CRC issued its Decision No. 220/30 July 2024, on 13 August 2024 the fixed communications infrastructure of Vivacom was transferred to a new entity within the United Group of companies through a spin-off of the physical infrastructure assets (ducts and facilities) used for the deployment of fixed networks and the fibre optical lines from Vivacom to United Fiber Bulgaria EOOD (United Fiber Bulgaria). Both companies continued to exist under the joint ownership of Slovenia Broadband Sarl. The CRC reacted to the newly established structure with Decision No. 328 of 7 November 2024, imposing provisional measures on United Fiber Bulgaria. The regulatory obligations are equivalent to the specific obligations previously imposed on Vivacom. The decision for imposition of provisional measures was appealed and suspended by the court until its final decision, and the case is still pending.

Law stated - 2 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

If the CRC determines that effective competition in a relevant market is deterred by a vertically integrated undertaking with SMP, it may order functional separation, by requiring the activities related to the wholesale provision of access services to be placed in an independently operating company. The separated undertaking must supply wholesale access services to all operators, including related parties, on the same terms and conditions, including prices and timescales.

The functional separation is an extraordinary measure that has not been used to date in Bulgaria, and the law prescribes that it must be applied only where all other measures have failed and there are important and persisting competition problems and (or) distortions in the relevant markets for wholesale access. The CRC may impose this obligation after completing public consultations and subject to authorisation by the European Commission.

If an undertaking with an SMP on one or more relevant markets decides to transfer its local access network assets or a substantial part thereof to a separate legal entity under different ownership, or to establish a separate business entity that provides fully equivalent access services to retail service providers, including to its own retail divisions, the respective undertaking shall notify the CRC on this intention. The CRC shall assess the effect of the intended transaction, together with the commitments offered, where applicable, on the existing regulatory obligations imposed on this undertaking, and on the basis of this analysis, the CRC may impose, maintain, amend, or withdraw obligations and may make obligatory commitments proposed by the undertaking.

Voluntary separation was a notable feature of the Bulgarian markets represented by the 2024 separation of the fixed network and physical infrastructure assets of Vivacom in a separate legal entity United Fiber Bulgaria EOOD, part of the same corporate group of United Group companies.

Law stated - 2 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

'Universal service' is defined as a set of services with a pre-set quality standard, which must be made available to all customers, regardless of their location in Bulgaria, at a reasonable price. Pursuant to the ECL and Ordinance No. 4 of 21 March 2023 on the conditions and procedure for the provision of the universal service under the ECL (the Ordinance on universal service), the universal service obligations include the provision of fixed-voice telecommunication services and adequate broadband internet access at a fixed location, which shall support, in any case, a set of services expressly specified under the ECL. The latter include:

- email;
- search engines;
- basic online tools for training and education;
- online newspapers or news;

- services related to the online purchase or ordering of books;
- services related to job search and job search tools, professional networking communities, online banking and utilisation of electronic administrative services;
- social media and real-time communication via text messages; and
- voice and video calls.

At the request of a user, these may be limited to the maintenance of voice communications services. It shall be noted that the Ordinance determines the conditions for the provision of and the quality parameters regarding the universal service.

The CRC is the authority with the power to impose universal service obligations on undertakings that provide fixed voice services and broadband access. Furthermore, the CRC may oblige such undertakings to take special measures for persons with disabilities. The conditions, modalities, and means, related to the provision of universal services to persons with disabilities, are outlined under the Ordinance on universal service. The CRC shall conduct an evaluation of the need to impose universal service obligations, as well as a review of those already imposed, every three years or upon a change of market circumstances. Currently, the former incumbent operator, Vivacom, has the obligation to provide universal service limited to fixed voice service.

Under the ECL, the undertakings with imposed obligations to provide universal service may request to be compensated for the proven net costs when the universal service provision represents an unfair burden on the said undertakings. The existence of an unfair burden is determined on the basis of the net costs, calculated in accordance with the rules adopted by the CRC (see Rules on Calculating the Net Costs for the Provision of the Universal Service, published in State Gazette issue 32 of 8 April 2023), and the intangible advantages for the undertaking, obtained from the provision of the universal service, provided that the provision results in losses or is offered at prices below a reasonable profit margin. The compensation resources for net costs of universal service provision shall be accumulated in a universal service compensation fund, which is an entity separate from the CRC.

The CRC adopted a decision on 8 February 2024, with which it determined that the appropriate speed of broadband internet access in each given location, as part of universal service, is 5 Mbps (download). The speed of 5 Mbps follows the requirement of article 182, paragraph 4 of the ECL that such speed is used and available to most users on the territory of the Republic of Bulgaria.

Law stated - 2 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

Undertakings providing public ECSs through numbers from the National Numbering Plan have the statutory obligation to provide for number portability, as end users have the right, upon their request, to keep their numbers, regardless of the operator that provides the service, for:

- geographic numbers: upon change of the provider of the service and (or) change of the address within one and the same geographic national destination code; and
- non-geographic numbers: for any location.

In the implementation of the number portability rules, the CRC has issued functional specifications for number portability, containing technical conditions for carrying out the porting, rights and obligations of the operators, procedure, pricing and expenditure distribution principles. Further to the functional specifications and under the supervision of the CRC, the respective groups of operators using particular types of numbers (for mobile, non-geographic or geographic services) have adopted detailed number portability procedures.

In 2024, the CRC amended its Rules on the determination of the terms and conditions for the provision of user location information and end-user data by the undertakings providing interpersonal communications services in the case of emergency calls. The amendments concern the criteria for accuracy and reliability of location information for calls to emergency numbers. For emergency calls from fixed networks, the accuracy of the caller's location information is determined by the physical address of the network endpoint, with a reliability of 90 per cent of calls. For emergency calls from mobile networks, caller location information should be provided with 50 metres (horizontal) accuracy for 80 per cent of calls.

Law stated - 2 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Pursuant to the ECL, undertakings providing ECN/S must offer those to the end users in compliance with the principles of transparency and equal treatment, considering the type of technology used, the categories of end users, the amount of traffic and the means of payment, and must not offer advantages to individual end users or groups of end users for the same services. Following the transposition of the EECC, the information and transparency obligations of ECN/S providers with respect to their customers differentiate between end users and consumers, and the consumer-specific obligations may extend to a specific group of end users – microenterprises, small enterprises and not-for-profit organisations unless the later have explicitly waived such protection. By way of an example, the following obligations apply:

- When providing ECS to consumers, microenterprises, small enterprises and not-for-profit organisations, providers have to make available to the customer:
    - a list of specific information as set out in article 226 of the ECL (namely, providers' identification data, characteristics of the services, minimum level of service quality, etc) on a durable media; and
    - a concise and easily understandable resume of the contract prior to its conclusion in the form provided for by the Commission Implementing Regulation (EU) 2019/2243. The information provided shall become an

integral part of the contract and cannot be altered unless expressly agreed otherwise.

- When providing ECS to end users (irrespective of whether consumers and irrespective of the size of the company) and the provision of the services is made subject to general terms and conditions, providers have to publish in a clear, comprehensive and easily accessible machine-readable form the information for the terms and conditions of the services (eg, contact data of the entity, description of the services, including access to emergency services, etc).
- Undertakings providing public interpersonal communications services or internet access services shall publish on their website, provide in a prominent place on their business premises, and any other appropriate manner up-to-date information on the general terms and conditions of the service, provider's contact details, registered office and address, phone number, email address and website; description of the services offered; and dispute resolution mechanisms, including those developed by the provider. Such information must be published in a clear, comprehensive and easily accessible machine-readable form and a format accessible to disabled users. Furthermore, providers must publish in the comparison tool, provided by the CRC, information about prices and tariffs for services and the quality of service to enable the end users to compare and evaluate different internet access, number-independent and number-based interpersonal communications services.
- If the internet access or interpersonal communications provider controls at least certain elements of the network directly or by virtue of a service level agreement, the company may be required to publish comprehensive, comparable, reliable, easily accessible and up-to-date information to end users on the service quality, as well as on the measures taken to ensure equality of access for users with disabilities. In addition, the CRC may require the provider to inform consumers if the quality of the services provided depends on external factors such as control of signal transmission or network connectivity.

Customer agreements enter into force seven days after execution unless the consumer has requested explicitly and in writing an immediate entry into force. Within this term, the consumer is entitled to withdraw from the contract without liability or the need to state any grounds. The ECL requires that the initial term of contracts between consumers and ECS providers (other than providers of machine-to-machine services or the number of independent interpersonal communications services) does not exceed two years and that the undertakings offer consumers the option to enter into a contract of up to one year. The conditions and procedures for contract termination must not hinder the ability of a consumer to change service providers. In addition, since 2012, on the expiry of the original fixed term, all end-user contracts become of indefinite duration and may be terminated by the customer on one-month notice.

In 2022, the CRC adopted Rules governing the process of switching internet access service providers, which came into effect on 25 May 2023. These rules outline the conditions under which end users can switch internet access service providers and detail the corresponding procedure.

In 2024, the practice of unilateral increase in monthly charges by mobile operators was investigated by the Commission for Consumer Protection. By series of orders,

the chairwoman of the Commission for Consumer Protection banned the practice of mobile operators unilaterally changing the contractual terms without prior agreement with consumers, specifically monthly chargers. The orders were appealed, and the national court dismissed the requests by operators for suspension of the decision pending the outcome of the appeal, effectively suspending the increase in charges for the time the cases are still pending. The actions by the Commission for Consumer Protection escalated to a point where the authority submitted an official request to the CRC to open a procedure for withdrawal of the spectrum permits issued to mobile operators. The CRC dismissed the request as non-proportionate.

Law stated - 2 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

Regulation (EU) 2015/2120 (the Regulation) is directly applicable and mandatory in its entirety in all EU member states, including Bulgaria, without transposition in the national legislation being necessary. The Regulation identifies measures concerning open internet access. The CRC has adopted the Position on the Implementation of the Requirements of articles 3 and 4 of Regulation (EU) 2015/2120 by Providers of Internet Access to End Users (the Position). The Position takes into consideration the Guidelines adopted by BEREC to be applied by the National Regulatory Authorities Concerning the European Net Neutrality Rules (the Guidelines).

With respect to zero-rating, the CRC has stated in its Position that it considers as admissible the applied by providers zero-rating practice where once the data cap is reached the access is blocked or the speed is slowed down for all applications for which the zero-rating is applied. The CRC shall assess the implementation of the applied zero-rating practices for every specific case and consider the relevant deliberations and criteria set out in the Guidelines.

With respect to bandwidth throttling, in principle, the CRC considers as a violation of the obligation of the providers of internet access services to equally treat all traffic agreements or practices where there is technical discrimination, which is expressed in, inter alia, blocking, slowing down, restricting, interfering with, degrading or violating or discriminating access to specific content, or one or more applications. Taking such actions by the providers of internet access services is justified only with a view to certain exceptions set out in the Regulation. The CRC created and approved a tool for measuring and monitoring the quality-of-service parameters for internet access, which enables consumers to measure download and upload speeds, delay, and other parameters when using internet access services.

Law stated - 2 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

Bulgarian law neither defines nor contains a specific regulation of digital platforms. To the extent digital platforms provide services at a distance, by electronic means, and at the individual request of the recipient of the service, in Bulgaria, they fall under the general regulation of information society services as per the Bulgarian Electronic Commerce Law (the national transposition of the EU E-Commerce Directive). In line with Regulation (EU) 2022/2065 (the Digital Services Act), applicable from February 2024, the provisions of the Electronic Commerce Law on liability of providers, although not formally revoked, are superseded by the rules of the Digital Services Act.

Further statutory rules may apply in addition to the ones relevant to the information society service. As an example, where a platform provides digital content and digital services to consumers, the consumer protection rules pertinent to digital content and digital services under the Bulgarian Supply of Digital Content and Digital Services and the Sale of Goods Law will apply (the national transposition of the Digital Content Directive). The services of the video-sharing platforms, on the other hand, are regulated under the Law on Radio and Television, which has already been harmonised with the rules of Directive (EU) 2018/1808 (the Revised AVMS Directive).

Since information society services are regulated under the law of the EU member state in which the service provider is established, and as long as most of the prominent digital platforms are not domiciled in Bulgaria, there are no noticeable enforcement initiatives of Bulgarian regulators or government authorities. Usually, the enforcement activities of Bulgarian authorities are limited to notice-and-takedown requests or notifying the respective regulator in the country of origin.

Currently, there is a bill for amending and supplementing the ECL, which aims to ensure the implementation of the requirements of the Digital Services Act. Under this proposed legislation, the CRC shall be designated as the Digital Services Coordinator, tasked with overseeing the implementation of the Regulation alongside the Electronic Media Council, which shall hold authority over video-sharing platforms domiciled in Bulgaria. Additionally, the Personal Data Protection Commission shall ensure compliance with the EU General Data Protection Regulation (Regulation (EU) 2016/679) and have jurisdiction over advertising on online platforms and the online protection of minors. The bill also includes provisions to regulate the certification of out-of-court dispute resolution bodies to settle disputes between online platform providers and service recipients. It outlines the certification procedure and grants the CRC the authority to investigate a body's performance and compliance, as well as to withdraw the certificate for non-compliance. Procedures are established for the granting of trusted flaggers status under the Regulation and for responding to complaints and signals received against intermediary service providers. Moreover, the bill aims for swift enforcement of liability for Regulation breaches through a specialised sanctioning procedure that deviates from the general procedure set out in the Law on Administrative Offences and Penalties. As of April 2025, the bill has not been approved by parliament and is not yet law. In the meantime, the CRC created a new Directorate – 'International activity, digital services and coordination' – which will handle most activities related to the Digital Services Act.

Law stated - 2 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

Bulgarian law does not define and rarely uses the term 'next-generation access network'. From a legal perspective, NGA networks are electronic communications networks and, due to the technological neutrality principle, with respect to regulatory regime and construction – they are subject to the same statutory rules as provided for the networks based on other technologies. The deployment of NGA networks, and following the transposition of the EECC – of very high-capacity networks, however, is used by the CRC as one of the relevant criteria, when resolving the price control mechanisms in respect of SMP providers or on the imposition of certain access obligations.

The deployment of very high-capacity networks has been envisaged in the Recovery Plan, prepared by the Council of Ministers to provide connectivity in remote and scarcely populated areas where it would be commercially unprofitable to invest (namely, white spots). Pursuant to the latest version of the Recovery Plan, the total planned resource is up to 632.9 million Bulgarian leva (approximately €323.89) (527.3 million Bulgarian leva (approximately €269.85) on account of the Recovery and Resilience Instrument and 105.6 million Bulgarian leva (approximately €54.04) national co-financing) with an execution period between 2022 and 2026.

In 2024, as a measure under the National Recovery and Resilience Plan of Bulgaria, the Ministry for Transport and Communications published its mapping of the existing broadband coverage in Bulgaria. The mapping will be used to designate the areas that are eligible for state aid funding for measures aimed at increasing coverage of very high-capacity networks, including 5G mobile networks. As a supporting measure, the ECNPIL was amended in April 2025 to exempt from building permissions certain building works related to upgrades of mobile base station equipment, in order to stimulate the network roll-out and to achieve the gigabit connectivity goals.

Law stated - 2 May 2025

Data protection

12 Is there a specific data protection regime applicable to the communications sector?

The data protection rules applicable in the area of electronic communications are provided for in the ECL. Such rules are specific to the sector and supersede the general rules of the data protection law.

In Bulgaria, the undertakings providing public ECN/S may collect and process customer, location and traffic data only where such data is directly intended for the provision of ECS. The communication and the related traffic data, location data and identification data of the user should not be disclosed, unless under the statutory procedures for traffic data

disclosure and interception. In the case of a personal data breach, the Bulgarian data protection authority – the Personal Data Protection Commission (PDPC), must be notified within 24 hours of becoming aware of the breach. Where the data breach might adversely affect personal data or the privacy of a customer or another individual, the customer whose data is affected must also be notified without undue delay.

In addition, specific rules in respect of data retention and data disclosure apply in the communications sector. Under the ECL, ECS providers must ensure the capacity to intercept electronic communications in real-time and the capacity for 24-hour surveillance, as well as access in real-time to data related to a specific call. Where such data may not be provided in real-time, they must be provided to the State Agency Technical Operations and the State Agency for National Security within the shortest possible period after termination of the call. The capacity for interception, 24-hour surveillance, and access to data related to a specific call in real-time shall be implemented solely according to the procedure established by the Law on Special Surveillance Means. Under the rules of the latter piece of legislation, special surveillance means may be used only for the prevention or investigation of severe intentional crimes, provided the necessary data cannot be collected by other means.

Furthermore, Bulgarian legislation provides mandatory retention for a period of six months of the data necessary to:

- trace and identify the source of a communication;
- identify the destination of a communication;
- identify the date, time, and duration of a communication;
- identify the type of communication;
- identify users' communication equipment or what purports to be their equipment; and
- locate the identifier of used mobile phones.

Retention of additional data, including but not limited to data about the contents of the communication, is not allowed. The listed types of data are retained and may be used for the purpose of facilitating the investigation of serious crimes, for national security purposes and for locating people in emergency situations. At the end of the six-month period, operators and service providers must delete the respective data. They should submit to PDPC monthly reports on the data, destroyed during the preceding month as well as annual statistical reports on the cases of disclosure requested by the competent authorities.

Requests for access to retained data may be made by certain categories of officials working at the police authorities, prosecution authorities, national security authorities and military officials. Authorisation for access is issued by the chairpersons of the regional courts or a judge authorised by the latter.

Following the Court of Justice of the European Union judgment of 17 November 2022 under Case C-350/21, the traffic data retention and disclosure obligations under Bulgarian law seem to be non-compliant with the EU law. In contrast with the said judgment, Bulgarian legislation provides for:

- general and non-selective retention of traffic data, even if limiting retention in time (six months in the case of Bulgaria) and providing for certain safeguards; and

- access by the competent national authorities to lawfully retained traffic data without ensuring that the persons whose data has been accessed have been informed and without those persons having a legal remedy against unlawful access.

To bring national law in line with the ECJ judgment, a bill for amending and supplementing the Electronic Communications Law was proposed to the parliament. The use of cryptographic methods in the processing and storage of traffic and location data is envisaged as a method of avoiding non-selective tracking and profiling of the persons for whom the data is requested. The aim is also to increase traceability and accountability in the keeping of registers for requests for access to traffic data. It is also provided that the persons whose data is requested shall be notified in cases where the data is used to prevent a serious crime or to terminate criminal proceedings. As of April 2025, the bill is still being debated in the parliament and is not yet law.

Law stated - 2 May 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

According to an explicit provision of the Bulgarian Cybersecurity Law (the national transposition of the Network and Information Security Directive), electronic communications providers are explicitly excluded from the scope of the statutory cybersecurity rules, except for three very specific web-blocking obligations. This is because they are subject to much stricter network and service security obligations under sector-specific electronic communications regulations.

Under the ECL and as part of their public security obligations, electronic communications providers in Bulgaria are required to take appropriate technical and organisational measures to manage the risk posed to the security of networks and services and to ensure the appropriate level of security corresponding to the assessed risk.

Following the transposition of the EECC, the CRC has the obligation to set forth specific statutory rules on the minimum network security requirements and, the related risk management methods. In compliance with such requirement, on 7 June 2022, the regulator published the Rules on the Minimum Security Requirements for Public Communications Networks and Services and the Methods of Security Risk Management. Pursuant to the said Rules, providers of public ECS/N:

- must make an initial risk assessment, that shall be the basis for determining the level of security, including preparing a complete list of assets that, if compromised or removed, could cause a security incident to the network or service;
- irrespective of the level of security determined as per the risk assessment, depending on the type of the network and the service they must use as a minimum the technical and security measures set forth in Appendix 1 to the Rules; and
- carry out regular security audits, as well as security audits after the occurrence of an incident.

The legislator has provided for a one-year grace period for the network and service security obligations under the Rules to enter into force, and thus the above-listed obligations are applicable from 9 June 2023.

In addition, providers of public ECS/N are obliged to:

- Notify the CRC in writing of any security-related incident having a significant impact on the operation of its network or services (no transition period with respect to the Rules for security incident reporting has been provided). The Rules set forth qualitative and quantitative criteria for assessing the incident as significant (eg, the number of users affected by the security incident, the particular duration of the security incident, the geographical scope of the area affected by the incident, etc), as well as the standard reporting form. The reporting is done in stages – the initial report should be made within 24 hours of establishing the level of impact of the incident, while the final report should be made immediately after the completion of the actions in relation to the incident.
- Block certain web content. The web blocking obligations are part of the public security obligations of the electronic communications providers; however, they are scattered in a number of sector-specific laws, rather than codified in the ECL. More particularly blocking activities are provided for in respect of illegal gambling, financial and touristic services websites, as well as in relation to counter-terrorism activities and malicious internet traffic. The supervision in respect of such obligations is vested with the respective sector regulator – the National Revenue Agency, the Financial Supervisory Commission, the Ministry of Tourism, the Ministry of Internal Affairs and the State Agency of National Security.

Following the entry into force of the Revised Network and Information Security Directive (NIS 2), it is expected that in view of its transposition, both the ECL and the Rules on the Minimum-Security Requirements for Public Communications Networks and Services and the Methods of Security Risk Management will be revised to update the electronic communications sector regulations with the new rules concerning cybersecurity.

As of April 2025, the NIS 2 Directive has not yet been transposed into national legislation. The Council of Ministers has proposed a bill to amend and supplement the Bulgarian Cybersecurity Law, aiming to align national law with EU regulations by transposing the NIS 2 Directive. The bill is designed to introduce the minimum requirements of NIS 2, while also granting the authority to implement additional, more detailed measures through secondary legislation. Once the amended Cybersecurity Law enters into force, public electronic communications providers will be governed by it, and the provisions of the ECL will be repealed. The Rules on the Minimum-Security Requirements for Public Communications Networks and Services and the Methods of Security Risk Management will continue to apply in the transitionary period until they are replaced by secondary legislation adopted for implementation of the Cybersecurity Law.

Law stated - 2 May 2025

Big data

Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

Apart from including large-scale registries of personal data as a privacy impact assessment criterion, currently, there is no specific Bulgarian legislation dealing with big data in particular. Thus, to the extent the concept of big data derives from the large volume of information and the need for its processing and management, in the absence of explicit regulation, the general statutory regime governing the type of data shall apply (eg, data protection: if big data concerns information about identifiable individuals, classified information regulations, where the data involves classified information, etc).

At the beginning of 2022, the PDPC published two non-binding information materials (one addressed to data subjects and one to controllers) clarifying some key issues in the processing of big data under Regulation (EU) 2016/679 (the General Data Protection Regulation) and the related possibility of profiling.

In September 2023 a Law for amending and supplementing the Law on Access to Public Information was adopted, with which Directive (EU) 2019/1024 of the European Parliament and of the Council of 20 June 2019 on open data and the re-use of public sector information was transposed in Bulgaria. In January 2025, the Ministry of E-government published a consultation document on possible approaches to adopt legislation for implementation of Regulation (EU) 2023/2854 of the European Parliament and of the Council of 13 December 2023 on harmonised rules for fair access to and use of data and amending Regulation (EU) 2017/2394 and Directive (EU) 2020/1828 (Data Act). As of April 2025, the results of the consultation are not available and there is no specific draft measure being discussed.

Law stated - 2 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

Bulgarian electronic communications law does not provide for the statutory obligation to store personal or traffic data locally in Bulgaria. This is unless the respective provider also qualifies as an ‘organisational unit’ under the Bulgarian Classified Information Protection Law (namely, state bodies, local authorities, legal entities and individuals that create, process, store or provide classified information (information that is a state or official secret, as well as the foreign classified information)). Access to this information is restricted and such organisational units have the obligation to comply with the statutory requirements for the protection of classified information, including storing classified information ‘in the organisational unit’.

Law stated - 2 May 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

In 2023, the total volume of the electronic communications market in Bulgaria amounted to 3.803 billion Bulgarian leva (approximately €1.94 billion), continuing the upward trend – the reported growth is 12.6 per cent compared to the data from 2022 (CRC 2023 Annual Report). Internet access services and other data transmission services account for 51.4 per cent of the market, followed by a 28.1 percent share of interpersonal communications services.

There are three active mobile operators in Bulgaria – A1 Bulgaria EAD (A1), Yettel Bulgaria EAD (Yettel) and Vivacom Bulgaria EAD (Vivacom). While it is expected that the growth of mobile telephony usage will remain stable, the use of fixed-voice telephony is continuously showing a downward trend.

The market is dominated by the mobile network operators (MNOs), and despite the existing legal framework, no mobile virtual network operators (MVNOs) are currently operating in Bulgaria. Mobile Alternative Communications AD was actively campaigning for the CRC to undertake regulatory actions towards the MNOs to provide access to their networks to the potential MVNOs. The CRC has not adopted regulatory measures for ensuring access to mobile networks. In 2025, the debate was renewed on whether the emergence of services based on an MVNO model should be encouraged.

The number of subscribers using fixed high-speed and ultra-high-speed access in Bulgaria is expected to increase due to the continuing migration to NGA networks. It is also foreseeable that the upward trend of IP TV will continue, with ever-more undertakings expanding their portfolio of services to provide TV content based on the availability of internet access with the corresponding guarantees of the quality of service. Yettel has set a new trend by offering an IP TV service over its mobile network.

There is a stable tendency toward consolidation and a trend related to structural separation.

In 2021, A1 Towers spun off from A1 Bulgaria, as such separation of the telecommunication infrastructure portfolio was carried out by Yettel in 2020 (the demerger of CETIN Bulgaria from Telenor Bulgaria), while United Towers Bulgaria was established as a result of the carve-out of Vivacom tower assets in 2022. Another trend is the investor's interest in telecommunication infrastructure companies. Since March 2022, GIC, an international investment and infrastructure fund based in Singapore, owns indirectly 30 per cent of CETIN Bulgaria. Furthermore, in August 2023 TAWAL, a subsidiary of stc Group, Saudi Arabia, acquired 100 per cent of the shares in United Towers Bulgaria EOOD. In the second half of 2024, Vivacom transferred its physical infrastructure and fibre optical network assets to United Fiber Bulgaria EOOD through a demerger.

In 2024, the Bulgarian telecom market witnessed several landmark M&A transactions. In February 2024, the competition authority cleared the acquisition of Bulsatcom EAD, Bulgaria's direct-to-home satellite television and broadband internet provider, by United Group, the parent company of Vivacom. This consolidation was appealed by A1 and Yettel. In October 2024, Emirates Telecommunication Group Company ('e&') completed the acquisition of a controlling stake (50 per cent plus one economic share) in the service and infrastructure companies of PPF Telecom Group across the CEE region, including CETIN Bulgaria and Yettel.

A major trend in regulation is the measures taken by the CRC to reinstate the specific obligations related to access to physical infrastructures (underground ducts) used for the deployment of fibre optical networks. By virtue of Decision No. 220/30 July 2024, the CRC designated Vivacom as an undertaking with SMP on the wholesale market for access to passive (physical) infrastructure and imposed the full set of obligations. Following the assets transfer to United Fiber Bulgaria, the CRC decided to impose provisional regulatory obligations on the latter. Both decisions were suspended pending appeals, which would likely lead to a renewal of disputes before the CRC under the existing national framework transposing the Broadband Cost Reduction Directive and the Gigabit Infrastructure Act once the regulation enters into force.

Since the enactment of the amendments to the ECL transposing the EECC, the CRC and the respective relevant Bulgarian ministries amended or issued new legislative instruments to bring the pertinent secondary legislation in line with the amended ECL.

The Digital Services Act and its anticipated implementation in the ECL will mark a new chapter in the regulatory activity of the CRC and the Council of Electronic Media in the field of regulation of online services. A bill for amending and supplementing the ECL was proposed with a view to ensuring the national implementation of the Digital Services Act. The CRC will be designated as the digital services coordinator for Bulgaria and the competent authority to oversee providers of intermediary services that do not qualify as video-sharing platforms and will monitor their compliance with the Digital Services Act.

Law stated - 2 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

Under Bulgarian law, content is regulated separately from the transmission and therefore the rules governing the provision of media services are stipulated in a separate set of legislative acts. Currently, audio-visual media services (both linear – programmes provided at a scheduled time and watched simultaneously by the audience and non-linear or on-demand services) and radio services are regulated as media services under the Law on Radio and Television (LRT) and the related subsidiary legislation. Said law also regulates the services of video-sharing platforms, although such services are explicitly excluded from the statutory definition of media services. Except for a few rules concerning transparency of ownership and the ultimate beneficial owners set out in various laws, the content and activities of traditional print media, such as newspapers and magazines are not subject to statutory regulation.

In December 2020, the LRT was amended to transpose Directive (EU) 2018/1808 of 14 November 2018 amending Directive 2010/13/EU (AVMS Directive). Following such amendment, the long-awaited Code of Conduct on the Measures for Assessment, Designation and Limitation of Access to Programmes that are Unfavourable or Create a Risk of Physical Harm, Mental, Moral and (or) Social Development of Children (Code of

Conduct), regulating child safety in media and video-sharing platform services has been enacted in January 2023.

The regulatory body in audio-visual media services is the Council on Electronic Media (CEM). It is the independent state authority vested with the powers to regulate both audio-visual media services and video-sharing platforms domiciled in Bulgaria.

Law stated - 2 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Pursuant to the LRT, providers of audio-visual media services shall be traders (individuals or legal entities) registered under Bulgarian law or legal entities incorporated in another EEA member state. Effective from 1 January 2014, the Law on the Economic and Financial Relations with Entities Registered in Jurisdictions with Preferential Tax Treatment, their Controlled Entities and their Beneficial Owners prohibits any entities registered in a jurisdiction having a preferential tax treatment, as well as their controlled entities to incorporate or acquire a shareholding in an entity that applies for or has been awarded a TV or radio programme licence under the LRT, provided that the shareholding confers 10 per cent or more of the voting rights. A similar restriction applies to publishers of periodic printed media, however, not to TV and radio operators, whose programmes are not intended for distribution via electronic communications networks for digital terrestrial or analogue broadcasting, as well as to on-demand service providers.

The LRT also lists certain categories of individuals and entities who are prohibited from participating in licensing procedures. These include, but are not limited to, individuals and entities who, based on their record, are not considered financially prudent, as well as such individuals and entities who were refused or prohibited from carrying out broadcasting activities within one year prior to submission of the licence application.

Other than the general rules for concentration under the anti-trust laws (permit holders are required to declare that they do not hold shares in other radio and TV operators exceeding the acceptable threshold under the anti-trust legislation), the separate regulation of transmission and content (the LRT restricts entities to which the Communications Regulation Commission (CRC) has awarded a permit for use of digital terrestrial broadcasting (DTB) spectrum from being a Bulgarian radio and TV operator) and the transparency of ownership and financial sources in the audio-visual media sector, Bulgarian law does not provide for special regulation in relation to the cross-ownership of media companies. The LRT does not, however, allow holders of local or regional programme licences (or related parties) to be issued with a licence with national coverage for the same activity, except when such holders give up the local or regional broadcasting licence. This rule does not apply to holders of a DTB licence.

The newly introduced foreign direct investment (FDI) screening mechanism in 2024 applies to foreign investors controlled by non-EU shareholders or those who are themselves

non-EU individuals or entities. The economic activities covered by the FDI screening also include investments in media or investments that may have an impact on the freedom and pluralism of the media. The statutory thresholds triggering the screening are as follows:

- investment exceeding €2,000,000 or investment that results in the acquisition of at least 10 per cent of the capital of a target operating in Bulgaria;
- the investment results in acquiring at least 10 per cent of the capital of a target operating in the high-tech sector; or
- new investment exceeding €2,000,000.

The FDI screening regime mandates that foreign investors should notify the planned investment and refrain from implementing the investment until receiving clearance by the Screening Council (intra-governmental body vested with the power to review FDI notifications). The notification process involves a two-step review, subject to specific deadlines, which culminates in either an express conditional or unconditional clearance, a tacit unconditional clearance, or an express prohibition of an investment. As of April 2025, the FDI screening regime has not yet been activated pending the adoption of secondary legislation by the Bulgarian Council of Ministers.

Law stated - 2 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Audio-visual media services in Bulgaria are provided under a licence, upon registration or following a notification to the CEM.

Radio and TV activity involving programmes transmitted via digital terrestrial or terrestrial analogue networks are carried out based on a licence issued by the CEM. Licences for programmes transmitted via terrestrial analogue networks are granted under a tender procedure initiated at the request of the interested party or the CEM. In its application, the interested party may indicate the broadcasting point and territorial coverage. In three (if no international spectrum coordination is required) to eight months (if international spectrum coordination is required) the CEM coordinates the technical aspects of the broadcasting with the CRC and thereafter opens a tender (depending on the available spectrum). Based on the results of the tender, the CEM resolves on the issuance of a licence for radio or television activity and a permit for the use of spectrum by the CRC for the applicant ranked first. Following the entry into force of the said resolution, the CEM would issue the respective licence and the CRC the related spectrum permit.

The programmes to be transmitted through DTB networks are also licensed by the CEM. Such licences entitle the operator to broadcast using the services of an entity authorised by the CRC for the use of the DTB spectrum. The procedure for issuance of the licence is initiated upon request of an interested party or by the CEM and takes about three or four months. The number of licences so issued is unlimited.

The programme licence granted by the CEM, irrespective of whether for transmission via analogue terrestrial networks or DTB networks is personal and may only be transferred with the CEM's prior consent and subject to fulfilment by the new licence holder of certain statutory requirements. The licence is granted for a term of up to 20 years and may be extended by the CEM upon the request of the operator.

The registration regime is applicable for programmes distributed via satellite and cable, programmes designated for audiences outside Bulgaria but transmitted through terrestrial or satellite networks on the territory of Bulgaria. The registration procedure is rather straightforward – it is initiated by an application and by law would be completed within 14 days. The registered operator has the obligation to notify the CEM of any change in the conditions, place, and manner of transmission and programming time within 14 days of its occurrence.

Non-linear (on-demand) services are subject to a notification to the CEM. Both the registration and the notification are of unlimited terms.

The fees payable for carrying out linear audio-visual activities are calculated in accordance with the Tariff for the Fees for Radio and TV Activity. The fees consist of an initial administrative fee, which covers the costs of issuing the licence or registration, and an annual fee. The latter varies depending on the type of service (radio or TV), the territorial coverage (local, regional or national), and the number of citizens who may take advantage of the licensed or registered service. No annual fee is due for on-demand services and the operator shall pay only the administrative fee for the issuance of a certificate for entry into the public registry of on-demand services.

Law stated - 2 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

Only audio-visual media service providers under the jurisdiction of Bulgaria are subject to authorisation in Bulgaria. Where a foreign service provider is established in an EEA country the activity as an audio-visual media service provider might be carried out based on the freedom of reception principle. Bulgaria may not restrict the service if the provider complies with the Audio-Visual Media Services Directive in the country of origin. Where circumvention of rules occurs, the Bulgarian regulator may restrict certain content, such as incitement to hatred, which may not be banned in the provider's country of origin but violates local laws. Such restrictions must follow a statutory procedure and are only allowed under exceptional circumstances (eg, where the service openly, substantially and grossly violates public order or gives rise to a serious and grave risk of affecting public health, etc).

No quota for local Bulgarian content has been set forth under the LRT. However, the law provides for a mandatory 50 per cent share of European works calculated from the total annual broadcasting time (excluding news, sporting events, TV games, commercials, teletext and teleshopping) that is applicable to TV linear media services. It is further envisaged that at least 12 per cent of such programme time (excluding any reruns) shall be

dedicated to European works of independent producers. The quota requirements are not applicable to programmes designated to the local audience and broadcasted by a single provider that is not part of a national network.

On-demand service providers, on the other hand, must ensure at least a 30 per cent share of European works in their catalogues, as well as the prominence of those works. Providers may give prominence to European works by an accessible and attractive presentation, for example:

- on a dedicated section accessible from the homepage of the service;
- searchability of European works from the search tool part of the service;
- use of European works in campaigns; or
- a minimum percentage of European works being advertised in the catalogue of this service (through banners or similar).

The 30 per cent share of European works is based on the total number of titles in the catalogue. Such quota requirements shall not apply to providers that are micro-enterprises as per the Recommendation of the European Commission of 6 May 2003 concerning the definition of micro, small and medium-sized enterprises, to providers that have an active interest of less than 1 per cent of the total audience of all on-demand services offered in Bulgaria, as well as where it would be impracticable or unduly justified by the nature or theme of the audio-visual media service.

With respect to radio programmes, the applicable law requires only that the creation and broadcasting of European works in radio programmes be encouraged, without setting any minimum reserved for Bulgarian or European works.

Law stated - 2 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Broadcast media advertising is regulated primarily by Chapter 4 of the LRT, which implements the relevant provisions of the AVMS Directive. The rules on media advertising cover audio-visual commercial messages, commercial messages transmitted on the radio, as well as those distributed by the operators of video-sharing platforms under the jurisdiction of Bulgaria. Thus, the operators of such video-sharing platforms also have to comply with the LRT advertising requirements (mainly commercial communication to be clearly identified as such, not to incite discrimination or behaviour that endangers human health and safety, to comply with the restrictions related to advertising of alcoholic beverages, and with the prohibition on advertising of cigarettes, other tobacco and related products, including e-cigarettes and refill containers, to protect children's health and mental well-being, etc). The operators of video-sharing platforms should also introduce appropriate measures that prevent the distribution of user-generated content that violates the above-identified advertising requirements.

Apart from the obligations of operators of video-sharing platforms under the jurisdiction of Bulgaria to comply with the LRT's advertising requirements, online advertising is not subject to regulation by the LRT or other codified regulation. However, there are some sector-specific regulations, such as the prohibition on advertising of tobacco and related products via information society services, the general prohibition on direct advertising of alcoholic beverages and the prohibition on online advertising of prescription medicines. Online political advertising will be subject to the newest Regulation on the transparency and targeting of political advertising, which will apply from 10 October 2025 across Europe.

As of 17 February 2024, article 26 of the Digital Services Act became applicable to online platforms that do not classify as micro or small enterprises. Further to article 26, each advertisement presented on the platform interface shall include information that enables the recipients of the service to:

- identify it as an advertisement;
- identify the person on whose behalf the advertisement is presented, as well as the person who has paid for the advertising, if different from the latter; and
- identify the parameters used to determine the recipient.

Providers of online platforms shall give recipients the functionality to declare whether the content contains advertisements that should be easily identified by other recipients of the service. Advertising based on profiling or using the special category of personal data is prohibited.

Law stated - 2 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Bulgarian law sets forth two sets of must-carry obligations – for providers of radio and TV programmes distribution networks (cable and satellite) and DTB network operators.

Must-carry obligations for conveying nationwide and regional programmes of the Bulgarian National Television and the Bulgarian National Radio free of charge are imposed on all cable and satellite operators that distribute TV programmes in Bulgaria. This obligation was reviewed and confirmed by the CRC in 2014.

In respect of providers of radio and TV programmes distribution networks, the CRC is authorised to impose obligations for the transmission of certain radio and television programmes, if said networks are used by a significant number of end users, including end users with disabilities, as their principal means to receive radio and television programme services. These obligations must be proportional and transparent and shall be imposed only when they are required to achieve objectives of common interest. The radio and television programme services shall be designated by the CEM according to the procedure established by the LRT. Providers, having such an obligation, shall determine cost-oriented prices for the distribution of such radio and television programmes. The CEM is the

competent body to determine through a reasoned decision the type and the profile of the licensed Bulgarian television or radio programmes that shall be mandatorily transmitted over the DTB networks. Pursuant to the LRT, the number of such programmes shall not exceed two programmes for each DTB network. So far, the CRC and the CEM have not exercised their powers to impose additional must-carry obligations or extend existing obligations to other platforms (namely, IPTV).

During the digital switchover must-carry obligations on DTB operators were imposed in favour of programmes of the public service broadcaster Bulgarian National Television and six active commercial TV programmes. The operators of DTB networks are obliged to transmit these programmes on the basis of cost-orientated prices set up in the contracts between the network operators and the content provider. The companies operating the DTB networks closed down and transferred their assets to a newly licensed DTB operator while must-carry obligations were not imposed on the newly licensed operator. Irrespectively, the network operator broadcasts on a commercial basis the TV programmes that were designated as 'must-carry' and continues to require terrestrial broadcasts (some of the programmes with a must-carry status were transferred to cable and satellite platforms). At present, the DTB operator broadcasts in one network three public-service TV programmes of the Bulgarian National Television and two TV programmes of commercial broadcasters.

Law stated - 2 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

Following the transposition of the revised AVMS Directive, currently, the LRT also regulates the video-sharing platform services provided by video-sharing platform providers under Bulgarian jurisdiction.

Provision of such video-sharing platform services is subject to a notification to the CEM, which notification shall be accompanied by draft general terms and conditions of the service in respect of which the LRT prescribes a minimum content requirement. The notification is thereafter entered into the public registry of video-sharing platforms kept by the CEM and the general terms and conditions are coordinated by the authority within 30 days of submission. The providers of video-sharing platforms have the obligation to protect:

- minors from programmes, user-generated videos and commercial communications that may impair their physical, mental, moral and (or) social development; and
- the general public from programmes, user-generated videos and commercial communications containing incitement to violence or hatred directed against a group of individuals or a member of a group based on any discrimination criteria, as well as from content the distribution of which constitutes an activity being a crime under the Bulgarian Penal Code, such as public provocation to commit a terrorist act, child pornography, racism and xenophobia.

In addition, video-sharing platform providers have certain obligations with respect to the commercial communications they are responsible for, such as to comply with the rules

of the National Ethical Rules for Advertising and Commercial Communication developed by the National Council for Self-Regulation and being transparent about commercial communications that are declared by the users when uploading content containing such communications. They must also provide for flagging and reporting mechanisms, systems to rate the content by the uploaders or users, age verification and parental control systems, as well as to set forth in their terms and conditions for use the prohibition for users to share unlawful content.

Since 2023, the CEM began registering providers of websites that include a section with video content (mainly news websites of established media providers or news aggregation websites) in the registry of video-on-demand providers thus classifying them as on-demand media services that fall within the scope of LRT provisions. The number of registered providers of on-demand media services as of 31 December 2024 was 67. The CEM continues its consistent efforts to encourage providers of on-demand services to register and monitor their activities. No new video-sharing platform providers were registered in 2024.

Law stated - 2 May 2025

Digital switchover

24 | When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

Analogue TV broadcasting was switched off on 30 September 2013 and from that date, broadcasting of terrestrial television in Bulgaria is digital only.

The relocation of the frequencies freed up as a result of the digital switchover has been carried out based on the Plan for Implementation of Terrestrial Digital Television Broadcasting (DVB-T) in Bulgaria and several amendments to the Electronic Communications Law and the LRT. The licences for use of the frequencies for DVB-T have been granted on the grounds of the competitive bid procedure; however, from 2021, only one national and one regional multiplex operator is in service, each providing for six programmes. The 782–862MHz band has been designated for mobile wireless broadband applications (the digital dividend) once this band is released from current government use, therefore, such band cannot be used for digital broadcasting.

Law stated - 2 May 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

Bulgarian telecommunications law is technology neutral and therefore authorisation regimes are based on the use of particularly scarce resources (spectrum), rather than on the type of particular technology (multi-channelling, high-definition, data services). In principle, the LRT regulates only two types of permits – for programmes transmitted

via digital terrestrial networks and for programmes transmitted via terrestrial analogue broadcasting networks. Only TV and radio operators transmit programmes via terrestrial analogue broadcasting networks' own spectrum permit issued by the CRC in addition to the programme licence granted by the CEM. Providers of programmes transmitted via digital terrestrial networks do not have a spectrum licence on their own. Rather, they are using the services of an entity authorised by the CRC for the use of the DTB spectrum (multiplex operators) to broadcast their programmes. Such multiplex operators have the obligation to transmit licensed TV and radio programmes of the type and profile determined by or coordinated with the CEM under the rules of the LRT.

Law stated - 2 May 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

There are no specific legal rules or processes for assessing media plurality by competent state bodies or for instructing companies to take steps in that regard. There is a general requirement that when deciding on whether to issue a licence for radio or TV activities, the CEM shall evaluate, among others, whether by issuing a licence, favourable conditions for media diversity and pluralism will be created. Additionally, the LRT prescribes that in exercising its functions, the CEM can undertake measures to ensure sufficient visibility of media services in accordance with general interest objectives, such as media pluralism, freedom of expression and cultural diversity. Furthermore, the LRT requires that the CEM shall protect freedom of expression, the independence of media service providers and media pluralism in exercising its powers. Thus, in the lack of effective mechanisms, quality journalism and media independence may be affected by the lack of plurality in media owners or economic models.

Law stated - 2 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

In 2024, based on the CEM Annual Report 2024, the issues attracting the attention of the media regulator in Bulgaria were very similar to those at the EU level. Some of these issues were the media coverage of the war between the military group Hamas and Israel, and the events in the Russian Federation provoked by the Wagner private military group. Focused monitoring was conducted on the coverage of the death of Russian opposition figure Alexei Navalny and the coverage of the war in Ukraine for the period from 16 February to 3 March 2024. Focused thematic monitoring was also carried out with respect to the adoption of the euro in Bulgaria and the entry of the country in the eurozone between 18–31 January 2024.

In 2024, the protection of children, as a vulnerable audience, remained a priority of the regulator. On 15 February 2024, the CEM held a discussion on the topic 'Children and the Media,' during which a commissioned study on children's media consumption was presented. The results of the study indicate that television is the most widely consumed type of media among children, with a significant majority (67 per cent) watching television daily. Furthermore, in 2024, the CEM adopted a document entitled *Recommended Screen Time for Children and Guidelines for the Use of Media and Online Content*. The recommendations primarily focus on child protection and adult support, emphasising that screens — and especially quality content — can offer numerous benefits in areas such as education, digital literacy, and access to culture.

In 2023, Bulgaria transposed the two directives at the heart of the European Union's copyright reform: Directive (EU) 2019/789 laying down rules on the exercise of copyright and related rights applicable to certain online transmissions of broadcasting organisations and retransmissions of television and radio programmes, and amending Council Directive 93/83/EEC and Directive (EU) 2019/790 of the European Parliament and of the Council of 17 April 2019 on copyright and related rights in the Digital Single Market and amending Directives 96/9/EC and 2001/29/EC.

On 2 July 2024, the CEM organised a discussion related to the European Media Freedom Act, which was adopted in 2024.

Bulgaria is yet to adopt implementing legislation related to Regulation (EU) 2022/2065 of the European Parliament and of the Council of 19 October 2022 on a Single Market for Digital Services and amending Directive 2000/31/EC (Digital Services Act). The draft legislation for the transposition of the EU Digital Services Act was published for public consultations in December 2023. The draft legislation envisions that the CEM is the designated competent authority responsible for supervising the implementation of Digital Services Act obligations by providers of intermediary services, which qualify as video-sharing platform services within the meaning of the LRT.

In 2024, the European Commission sent a letter of formal notice to Bulgaria for failing to nominate national digital service coordinators under the Digital Services Act – an obligation which member states had to comply with by 17 February 2024. A bill for the adoption of national measures for implementation of the Digital Services Act is being considered by the national parliament.

On 11 April 2025, the Accessibility Requirements for Products and Services Law was promulgated in the State Gazette. This legislative act applies inter alia to services providing access to audiovisual media services. The legislation does not apply to pre-recorded media content with a fixed duration, published before 28 June 2025 on websites and mobile applications. The new law regulates the accessibility requirements for products and services; the procedure for assessing the conformity of products with these requirements; the obligations of economic operators who place products on the market or provide services; the supervision of products made available on the market and (or) put into operation; and the control of the compliance of services with the accessibility requirements. The CEM is designated as the supervisory authority for services providing access to audiovisual media services.

Law stated - 2 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

State governance in the telecom sector is exercised by the Council of Ministers (namely, the government), the National Radio Frequencies Spectrum Council (the coordinating body within the Council of Ministers) and the Ministry of Transport and Communications. The Council of Ministers adopts and updates the state policy in the electronic communications sector and the state policy on planning and allocation of the radio frequency spectrum. The latter is drafted by the National Radio Frequencies Spectrum Council, which also maintains the National Plan for Allocation of Radio Frequency Spectrum. The Ministry of Transport and Communications has general oversight over the electronic communications and information society sectors, and its powers include, among others, preparing drafts of secondary legislation acts, representing the country in international organisations, etc.

In addition, broad sector-specific regulatory competence is vested with the Communications Regulation Commission (CRC), which is an independent state agency and a separate legal entity. The CRC is a collective body, consisting of five members, including a chairman and a deputy chairman. The CRC chairman is appointed and released from office by the Council of Ministers. The deputy chairman and two of the members are appointed and released from office by parliament, and one CRC member is appointed and released from office by the p. However, each member of the CRC should be appointed after a competitive selection procedure. The term of office of all members is five years, and a member may not serve for more than two consecutive terms of office.

The CRC has the power to regulate and monitor the compliance of providers and the provision of electronic communications services (ECSs) and electronic communications networks (ECNs) with the applicable law. Among others, the CRC must:

- determine the relevant markets of ECNs and ECSs subject to ex-ante regulation under the Electronic Communications Law (ECL);
- investigate, analyse and evaluate on a regular basis the level of competition in the relevant markets; and
- determine the undertakings with significant market power (SMP) and impose on them, amend or revoke specific obligations aiming to preserve or restore effective competition.

The CRC is also the authority competent to issue, amend, supplement, transfer, suspend, terminate or revoke permits for use of an individually allocated scarce resource. The CRC has the power to resolve disputes between undertakings providing ECSs and review claims submitted by end users in specific cases envisaged in the ECL. The CRC maintains mutual cooperation with the national regulatory authorities of other EU member states and with

the European Commission to procure the development of consistent regulatory practices and implementation of EU law.

Another public authority with specific competence in the media sector is the Council on Electronic Media (CEM). It is an independent state agency and a separate legal entity, comprising five members: three appointed by parliament and two by the p. The term of office for all CEM members is six years. The composition of the authority is renewed every two years within the parliament's quota and every three years within the p's quota. A member of the CEM may not serve for more than two terms of office and such terms of office may not be consecutive.

The CEM is vested with the power to regulate media services and services provided by video-sharing platforms under Bulgarian jurisdiction. It is charged with the following tasks and competence:

- to supervise the activities of media service providers and operators of video-sharing platforms for compliance with the Law on Radio and Television;
- to issue opinions on draft legislative acts and international treaties in the media services sector;
- to award individual broadcasting licences to radio and TV broadcasters for national and regional programme services, which have the right to be distributed by an undertaking that has been granted an authorisation for the use of a radio frequency spectrum for the provision of electronic communications over networks for digital terrestrial broadcasting (DTB) with national or regional scope; and
- to keep public registers of:
- radio and TV programme services that are distributed over cable ECNs, by satellite and over ECNs for DTB;
- radio and TV programme services that are distributed over existing or new ECNs for analogue terrestrial broadcasting; and
- on-demand media services;
- undertakings that distribute Bulgarian and foreign programme services; and
- video-sharing platform providers under the jurisdiction of Bulgaria.

Finally, the Commission on Protection of Competition (CPC) is also competent to intervene in the telecoms and media sectors to monitor compliance with the Protection of Competition Act (PCA). The PCA covers all business operations in all sectors of the economy and the presence of sector-specific regulatory requirements does not prevent its application. The PCA comprises the substantive rules on restrictive horizontal and vertical agreements, abuse of dominance and monopoly, merger control, sector inquiries, compliance review of legislation and administrative acts, unfair trading practices, and unfair trading practices in the agricultural and food supply chain. The PCA also constitutes the national competition authority – the CPC – and sets out the rules for antitrust investigations, merger control, sector inquiries, enforcement and imposition of penalties for breaches of competition regulations.

The principal responsibility for enforcement of the competition rules in Bulgaria falls to the CPC. The latter is an independent, specialist state agency, composed of seven members

elected by parliament. The tenure for all members is seven years. In 2025, a new panel of the CPC is expected to be elected and commence its term of office.

The CRC and the CPC must act in coordination and cooperation. Mergers and joint ventures in the telecoms and media sectors that meet the relevant national thresholds are reviewed by the CPC. The CRC is competent to review and authorise the transfer of a permit for the use of an individually allocated scarce resource or one or more of the rights and obligations related to such permit applying its special statutes. In theory, the CRC should have exclusive jurisdiction to monitor compliance with the ECL and to regulate SMP, but in practice abuse of SMP may fall within the purview of the PCA and thus should be also investigated and sanctioned by the CPC.

There are some mechanisms aiming to ensure consistency in the application of the different regimes and to avoid the conflicting exercise of jurisdiction. First, there is a cooperation agreement between the CPC and the CRC, pursuant to which in cases related to matters that fall within the competence of both authorities they inform one another of new proceedings, assist each other in the course of ongoing investigations, and inform each other about draft decisions they intend to adopt. Second, the ECL contains specific provisions regarding cooperation between the CRC and the CPC, especially with respect to ex-ante market review. The CRC is obliged to consult the CPC when adopting a methodology for the terms and procedure of relevant markets definition, analysis and assessment, and criteria for designating undertakings with SMP (the currently effective version adopted by CRC Decision No. 2076 of 23 October 2012, promulgated in State Gazette No. 89 of 13 November 2012, in force from 13 November 2012, last amended as per State Gazette issue No. 2 of 7 January 2022).

In 2024, the CPC and the CRC implemented this cooperation mechanism. The CPC confirmed that the wholesale market for access to physical infrastructure as defined by the CRC is a relevant market susceptible for ex ante regulation, in particular because the former state incumbent (Vivacom) owns a significant part of this infrastructure. The CPC emphasised that such ex ante regulation does not preclude the possibility for the CRC to intervene in the case where an abuse of a dominant position is detected, including by imposing appropriate behavioural and (or) structural measures – although in such a particular case, ex ante regulation would be more effective due to its preemptive nature.

Law stated - 2 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

The decisions of the national regulators (namely, the CRC, the CEM and the CPC) qualify as administrative acts (general or individual) and are subject to appeal before the Administrative Court Sofia-district (ACSD) pursuant to the rules and procedures set forth in the Administrative Procedure Code. The grounds on which a general or individual administrative act can be challenged are as follows:

- lack of competency of the issuing authority;
- failure to comply with the formal requirements set out by law;

- a material violation of the administrative procedure rules;
- non-compliance with substantive legal rules; and
- non-compliance with the purposes of the law.

The ACSD reviews the appeal in a panel of one judge and can affirm the respective regulator's decision, affirm and revise in part the administrative decision (eg, revise the amount of the sanctions imposed) or quash the decision. In such cases, the court may also return the case to the authority for de novo proceedings.

The judgment of ACSD is subject to further appeal on points of law before the Supreme Administrative Court (SAC) acting in a panel of three justices (a chamber). The chamber focuses primarily on the quality of the preceding judicial review, but it would also analyse the underlying administrative act. If it quashes the judgment of the first instance court, it must decide the case on the merits, unless a manifest breach of procedural rules was committed or additional facts need to be established, for which written evidence is not sufficient. In the latter case, proceedings must be remanded back to the first instance court. SAC judgment is final and is not subject to further appeal.

Law stated - 2 May 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

In recent years, major concentrations in the telecom and media sector were represented by a series of acquisitions undertaken by United Group – a multi-play telecoms and media provider active in Southeast Europe. In 2020, it acquired Bulgarian Telecommunications Company, the former incumbent telecom operator , which was renamed Vivacom Bulgaria EOOD in 2022, and Nova Broadcasting Group EOOD, a major media group. In 2024, United Group, through Vivacom and United Towers Bulgaria EOOD, acquired the fixed and mobile communications infrastructure of Bulsatcom EAD (Bulsatcom), a major satellite and cable operator, among the top five retail suppliers of pay TV and the third operator on the fixed broadband market.

This acquisition was implemented through several steps. In 2023, United Towers Bulgaria EOOD and Vivacom acquired the fixed and mobile communications infrastructure of Bulsatcom. It is worth mentioning that this acquisition was not considered as a notifiable concentration by the CPC because (1) the transfer of the fixed optical network was structured as a sale-and-leaseback transaction and thus no change of control took place; and (2) the mobile network assets have not generated relevant income during the preceding financial year and thus the statutory turnover thresholds were not reached. A couple of months later, Vivacom announced its plans to acquire Bulsatcom. With respect to this transaction, the CPC initiated an in-depth investigation, but after collecting additional information and statements from competitors and competent authorities (most of the statements were negative), the CRC among others , the CPC unconditionally cleared the concentration, as it has done with respect to all previous acquisitions. One of the important issues discussed during the in-depth investigation was whether streaming

service providers and suppliers of DHT or satellite TV from neighbouring countries should have been included in the retail pay TV market. When streaming platforms and foreign DHT or satellite TV suppliers were taken into account, the combined post-transaction market share of Vivacom and Bulstacom fell to 40 per cent or even less. On the basis of the data collected by the CPC during the in-depth investigation, and taking into account the European Commission's decisional practice (the CPC cited decisions on cases M.9064 – Telia Company/Bonnier Broadcasting Holding; M.9604 – Nent/Telenor/JV; M.9802 – Liberty Global/DPGMedia/JV; M.10475 – United Group/Wind Hellas), the authority accepted that streaming services and foreign DHT or satellite TV providers should be included in the retail pay TV market.

The competitors appealed all the clearance decisions; however, the courts upheld all the clearance decisions. In one case, the initial decision of the CPC was quashed on the ground that Vivacom notified several acquisitions within a short time frame, and the competition authority failed to take into account the combined effect of all transactions on all relevant markets. After renewed merger proceedings, the respective concentration was unconditionally cleared and the clearance decision was upheld by the courts.

With respect to the acquisition of Bulsatcom, both the ASCD, and the SAC upheld the clearance decision. In particular, the courts explained that the finding that the streaming platforms and foreign DHT or satellite TV supplies are competing with distributors of pay TV in Bulgaria is correct. The courts based their decision also with reference to the European Commission's practice and the data about customer preferences collected during the in-depth investigation. Objections raised by the competitors that the concentration results in the removal of important competitive constraint on the relevant markets have been rejected based on the finding that there was a permanent trend in declining subscribers of Bulsatcom in recent years.

In October 2024, after unconditional clearance by the CPC and approval of the transaction by the European Commission under the Foreign Subsidies Regulation, Emirates Telecommunications Group Company ('e&') acquired a controlling stake (50 per cent plus one economic share) in the service and infrastructure companies of PPF Telecom Group across the CEE region, including the mobile operator Yettel and CETIN Bulgaria.

In May 2023, the CPC initiated antitrust proceedings for the potential abuse of dominant position by Vivacom. The investigation concerned unjustifiably high prices for access to the underground duct network of Vivacom. The potential anticompetitive impact arises from the necessity of accessing this infrastructure for the provision of electronic communications services. Since various operators asked the CRC to intervene and resolve the disputes regarding access prices under Directive (EC) 2014/61, the CPC stayed proceeding until the entry into force of the decisions of the telecom regulator. The proceedings are still suspended until the entry into force of the CRC's decision designating Vivacom as an undertaking with SMP on the market for access to passive (physical) infrastructure.

According to the report on the CPC's annual priorities for 2025, the telecommunications sector will be a key focus for monitoring by the authority. The CPC emphasises that telecommunications play a leading role in transforming digital infrastructure and services, which form the foundation of the digital economy. Therefore, the CPC will closely monitor this sector. If the authority detects that certain market behaviour results from collusion, coordination, or unregulated interactions between independent economic operators, the CPC affirmed its commitment to exercise its statutory powers to restore fair competition.

Law stated - 2 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The laws in the People's Republic of China (PRC) governing the communications sector encompass two parts: (1) the legal provisions pertinent to the information and communications industry included in the corresponding laws, such as the Constitution of the People's Republic of China, the Criminal Law and the Protection of State Secrets Law, the Cyber Security Law (CSL), the Data Security Law of China (DSL) and the Personal Information Protection Law; and (2) specific laws directly tackling issues relating to the communications industry, where the principal regulation with regard to the telecommunications services is the Telecommunications Regulations of the People's Republic of China (2016), along with the Catalogue of Telecommunications Services (2015) (the 2015 Telecoms Catalogue), further revised in 2019. There are specified laws, regulations and national standards governing data processing, internet security and so forth in industrial sectors such as automotive, medical and e-commerce.

Telecommunications Regulations of the People's Republic of China (2016)

This primarily provides general regulations governing domestic telecommunications services, including the licensing of telecommunications services, the provision of telecommunications services, the construction of telecommunications facilities and telecommunications security.

Catalogue of Telecommunications Services (2015)

The Ministry of Industry and Information Technology (MIIT) issued the Telecoms Catalogue, the latest version of which is the 2015 Telecoms Catalogue, which was published in 2015 and revised in 2019.

Internet Information Services Measures (revised in 2011)

The Internet Information Services Measures (revised in 2011) (the 2011 Internet Information Services Measures) issued by the State Council are the fundamental legislation governing activities that provide information to online users through the internet. Moreover, mobile internet information services are governed mainly by the Regulations on Administration of Information Services of Mobile Internet Application Programs (2022) (the 2022 Mobile App Provisions). Since those services are provided through processing online information, they are generally considered as a type of value-added telecoms services (VATS), and in particular, the information service falls into the second category of VATS.

Measures on Administration of Telecommunications Business Permits (2017)/Catalogue of Telecommunications Services

The two rules are generally used in conjunction with each other, a telecommunications operator who operates basic telecommunications services or VATS (as classified in the Catalogue of Telecommunications Services) shall obtain a licence under the Measures for the Administration of Telecommunications Service Operating Permits or the Rules for the Administration of Foreign-Invested Telecommunications Enterprises.

Regulations on Administration of Foreign-funded Telecommunications Enterprises (revised in 2022)

To encourage the development of the technology, media, and telecommunications (TMT) industry, China has developed various incentives and preferential policies and has conditionally allowed foreign companies to participate in the operation of the telecommunications industry in China. The rules mainly stipulate the various conditions and application methods and application materials for foreign companies to participate in the operation of China's telecommunications business.

Special Administrative Measures for Foreign Investment Access (Negative List) (2024 edition)

According to the catalogue: (1) foreign investment telecommunications companies should be limited to those businesses that have been liberalised in accordance with China's commitments when joining in the World Trade Organization; (2) the proportion of foreign investment in value-added telecommunications business (except for e-commerce, domestic multi-party communications, store-and-forward and call centre services) shall not exceed 50 per cent; and (3) the controlling stake of the basic telecommunications business shall be held by the Chinese party.

In general, the communications industry remains a restricted sector for foreign-invested companies. However, this legislative restriction is starting to unravel. On 10 April 2024, the MIIT announced the Notice on the Pilot Scheme for the Further Opening of Value-Added Telecom Services to Foreign Investment (the Pilot Scheme), aiming to expand opening-up in the telecoms and internet sector to foreign investors. At the initial stage, the Pilot Scheme will be implemented in four designated pilot zones: (1) the Beijing Municipality Service Sector Comprehensive Demonstration Zone; (2) the Shanghai Pilot Free Trade Zone Lin-gang Special Area and the Socialist Modernisation Leading Zone (also known as Pudong New Area); (3) the Hainan Free Trade Port; and (4) the Shenzhen Advance Demonstration Zone of Socialism with Chinese Characteristics (also known as Shenzhen). Each provincial government of these pilot zones will develop a detailed pilot implementation plan for their respective pilot zone, and the pilot implementation plans will be subject to the MIIT's further evaluation and approval. Although it is currently limited to the above-mentioned pilot zones, where foreign investors will be allowed to wholly own companies engaging in value-added telecoms services, successful implementation in those regions may lead to further expansion of the Pilot Scheme, gradually opening up China's telecoms and internet sector to foreign market players on a larger scale, which in turn allows China to integrate into the global digital economy.

Law stated - 23 April 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

The MIIT is the governmental agency responsible for allocating these resources. According to the Telecommunications Regulations, telecommunications resources can be allocated to business operators through administrative allocations and public auctions, where most resources are allocated via the administrative allocation process. Telecoms operators shall apply to (1) the MIIT for inter-provincial telecoms resources and international telecoms resources, or (2) the MIIT's local counterparts at the provincial level for intra-provincial telecoms resources. The MIIT and its local counterparts shall review the applications and decide whether to allocate the required resources within 60 and 40 days, respectively.

According to the Administrative Measures on Telecommunications Business Permits (2017), the authorisation and licensing regime is stated in Chapter 2, detailed steps of which are set out below:

- Step 1 (confirmation of eligibility of the applicant): to satisfy each requirement for the qualification of an applicant company;
- Step 2 (materials submission): submission of application materials to the MIIT; and
- Step 3 (approval procedure): the MIIT shall review the application within 180 days of the date of its acceptance, and decide whether to approve or disapprove. If approved, the application will obtain the basic telecommunications business licence. If not, the applicant shall be notified in writing with the explanations.

Law stated - 23 April 2025

Flexibility in spectrum use

3 | Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

According to the Telecommunication Regulations, the central government shall adopt unified plans and centralised management for rationally allocating telecommunications resources and implement a system of paid use. Telecoms resources are resources with telecommunications functions and limited in number, which include radio frequencies, satellite orbital positions and telecommunication network codes, and shall be used upon paying telecommunications resource fees.

Based on the Administrative Measures on Telecommunications Business Permits (2017) and the Catalogue of Telecommunications Services, enterprises shall obtain an administrative licence to operate a telecommunications business. The basic telecommunications business licence is divided into two major categories along with 25 subcategories. The scope of the licensed business will be reflected in the licence issued by the competent governmental authority, and the applicant can only conduct business within the licensed scope.

The licences are not allowed to be transferred or traded. A branch company may use the licence of the head office in accordance with the law; however, the subsidiary company, under the PRC law, is an independent legal person and will not be deemed

as directly obtaining the licence held by the parent company. In addition, subject only to the approval from the licensing authority, the telecommunications business operator may further authorise its licence to eligible enterprises.

Law stated - 23 April 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

China implements a licensing system for operating telecoms businesses, and any business operator that uses public network infrastructure to provide telecoms and information services is required to obtain a telecoms business licence or value-added telecoms business licence. The specific business scope will be listed directly on the licence, and the operator can only conduct business within the scope stated in the licence.

According to article 19 of the Internet Information Services Management Measures, the following acts are deemed a violation of the provisions of such measures: (1) engaging in operating Internet information services without obtaining a business licence; and (2) providing services beyond the permitted items. The local telecommunications management agency shall order rectification within a certain period of time, and if there is any illegal income, the violating party shall be subject to the confiscation of illegal income together with a punitive fine ranging from three to five times the amount of the illegal income. If there is no illegal income or the illegal income is less than 50,000 yuan, the violating party shall be subject to a fine ranging from 100,000 yuan to 1 million yuan. If the circumstances of violation are serious, the relevant governmental authority may issue an order to the violating party to close the site.

Matters such as price transparency and price control are under the authority of the State Administration for Market Regulation (SAMR) and its local counterparts; if there is price discrimination involved, the Anti-Monopoly Bureau under the SAMR will take the charge.

Law stated - 23 April 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

There is no legal requirement in China for structural or functional separation between an operator's network and service activities. The necessity of this separation is still under discussion in China.

Because China is currently vigorously developing its telecommunications and networks, if the network separation is implemented, it may cause potential damage to the economy, integration efficiency and investment in this area. Admittedly, network separation is a

possible option when tackling monopoly issues. However, anti-monopoly has not been the thorniest issue in China's telecommunications market compared to its development. For the time being, there are no provisions in the Anti-Monopoly Law of the PRC (amended in 2022) addressing the above issues, and China is not considering the introduction of relevant legal provisions in this regard.

Law stated - 23 April 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

According to the Regulations on Administration of the Interconnection of Public Telecom Networks (revised in 2014), telecommunications service operators shall fulfil obligations to: (1) safeguard national interests and the legitimate rights and interests of users; (2) protect fair and effective competition among telecommunications business operators; and (3) ensure timely and reasonable interconnection of public telecommunications networks.

Relatively asymmetric rules are applied to dominant telecoms operators and non-dominant operators in China. The Regulations on Administration of the Interconnection of Public Telecom Networks, together with the Telecommunications Regulations of the People's Republic of China, specifically impose obligations on dominant operators. For instance, dominant operators shall: (1) provide non-dominant operators with information on network functions and equipment allocations concerning the interconnection; and (2) facilitate non-dominant operators' use of their facilities absent of any unreasonable conditions.

Law stated - 23 April 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

The number used in China consists of 11 digits, where each segment has a different coding direction listed in the below table.

Segments of telephone numbers in China

Segment	Sequence of numbers	Referential meaning
1	the first 3 digits	network identification number
2	the 4th–7th digits	area code

3	the 8th–11th digits	user number

The number is also known as the MDN number; that is, when the mobile user of this network is called, the number that the calling user needs to dial. It takes E.164 coding; stored in HLR and VLR, transmitted on the MAP interface, the structure of MDN number is as follows:

- CC + MAC + H0 H1 H2 H3 + ABCD;
- [CC]: country code, China uses 86;
- [MAC]: mobile access code, this network uses the network number scheme for 133;
- [H0H1H2H3]: HLR identification code, unified allocation by the operator; and
- [ABCD]: Mobile subscriber number, assigned by each HLR itself.

There are currently three major mobile network operators in China, all of which operate both nationwide and worldwide. At present, the three operators are piloting a policy allowing users to change operators without altering cell phone numbers.

According to the Measures for the Administration of Telecommunications Numbering Resources Allocation, China's three major telecom operators (ie, China Mobile, China Telecom and China Unicom) can apply for telephone numbers from the MIIT and its local counterparts.

Law stated - 23 April 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

According to the template texts of customer terms and conditions offered by the three major mobile network operators in China (i.e. China Mobile, China Unicom and China Telecom), the terms and conditions are generally governed by the following laws and regulations, focusing on the area of user registration, operator qualifications and services provided: personal information and privacy protection section in the Civil Code of the PRC, Cybersecurity Law of the PRC, Telecommunications Law of the PRC, Regulations on the Registration of Identity Information of Telephone Users, Data Security Law of the PRC, Personal Information Protection Law of the PRC, Decision of the Standing Committee of the National People's Congress on Strengthening the Protection of Network Information and Provisions on the Protection of Personal Information of Telecommunications and Internet Users.

The contract shall specify the fee schedule proposed by the operator. Each telecoms operator shall: (1) provide services to users in a fair manner; (2) not change the fee schedule or service content without the customers' consent; and (3) notify customers 30 days in advance if any of them intends to suspend its service.

Law stated - 23 April 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

To date, there are no legal provisions concerning the general user and mobile network communication priority. In practice, the data transfer priority selected by users themselves through the setting of the router is permitted. A general provision in the Telecommunication Regulations states that telecoms operators shall provide telecoms services to users on a non-discriminatory basis.

Law stated - 23 April 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

In October 2021, the SAMR published the Guidelines for Implementing the Main Responsibilities of Internet Platforms (Draft for Comments), which encompasses 35 articles aiming to regulate internet platform operators in various aspects, such as data management, data security, anti-monopoly and anti-unfair competition.

In June 2024, the National Information Security Standardization Technical Committee issued the Practical Guide to Cybersecurity Standard – Guide to Cybersecurity Evaluation of Large Online Platforms, which provides detailed instructions on the contents of potential risks large online platforms shall pay attention to and the methods for evaluating cybersecurity by large online platforms, ensuring such platforms to comply with the current cybersecurity laws and regulations.

Law stated - 23 April 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

To date, no relevant laws and regulations in China have been introduced in this regard. Nevertheless, the Chinese government has attached significant importance to the development of the telecommunications industry and continuously exerted efforts to allocate financial resources for developing telecommunications networks. The Chinese government is continuing to facilitate the Internet Information Service filing and approval, improve the internet protocol (IP) address and domain name management and promote more scientific management of 5G application and 6G development as well as satellite radio frequency planning and licensing.

Law stated - 23 April 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

In December 2020, the MIIT issued Guidelines for the Construction of Data Security Standard System for Telecommunications and Internet Industry. The Guidelines provide: (1) basic common standards; (2) key technical standards; (3) security management standards; and (4) standards applicable to other critical areas for the purposes of combining with the development of a new generation of information and communication technologies in the fields of 5G, mobile internet, internet of vehicles, internet of things, industrial internet, cloud computing, big data, artificial intelligence and blockchain.

Law stated - 23 April 2025

Cybersecurity

13 | Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

Over the past decade, effective reforms have been implemented to build a cyberspace and data security system in China. From the Cybersecurity Law of 2017 to the Data Security Law and Personal Information Protection Law of 2021, China has built a legal system that covers network security, data security and personal information protection. The Cybersecurity Law, Data Security Law and Personal Information Protection Law, which constitute the three pillars of information security in China, have shaped the reform agenda in the field of cyberspace, by regulating cross-border flow of data, curbing the misuse and abuse of personal information via cyberspace and disciplining online platforms.

Cybersecurity Law of the PRC

As the first specific law in the field of internet governance in China, the Cybersecurity Law involves the overall governance of cyberspace, focusing on systems such as critical information infrastructure protection, cybersecurity review and cross-border data flow. In particular, the law clarifies the basic requirements and main objectives of safeguarding cybersecurity, puts forward the key areas of cybersecurity policies, tasks and measures and provides a basic foundation for building a complete system of cybersecurity laws and regulations.

Data Security Law of the PRC

As China's first law on data security the Data Security Law regulates data protection, development and use. Moreover, it clarifies the supervisory responsibilities of data security authorities, establishes a sound data security cooperative governance system, builds a

regulatory basis for data security in various industries and provides strong support for the safe and healthy development of the digital economy.

Personal Information Protection Law of the PRC

The Personal Information Protection Law determines the basic principles and institutional rules for the protection of personal information, aiming to regulate personal information processing activities, guarantee the free flow of personal information in an orderly manner in accordance with the law and promote the rational use of personal information. In addition, it clarifies the concept of personal information and rules of information processing, emphasising that business operators shall not excessively collect personal information.

Cryptography Law of the PRC

As a comprehensive and fundamental law in the field of cryptography in China, the Cryptography Law of the PRC clearly stipulates the definition, classification and classification management standards of cryptography in order to regulate the application and management of cryptography, safeguard network and information security and enhance the scientific, standardised and legalised level of cryptographic management.

Law stated - 23 April 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

The Chinese legislation system addressing legal issues in relation to big data is buttressed by three basic laws and regulations – the '3 pillars + N pattern': (1) the Cybersecurity Law, published on 7 November 2016, in effect since 1 June 2017; (2) the Data Security Law, published on 10 June 2021 and in effect since 1 September 2021; and (3) the Personal Information Protection Law, published on 20 August 2021 and in effect since 1 November 2021.

The Cybersecurity Law aims to bolster network security in China, with its specified objects of protection falling into two major categories: (1) network operational security, focusing on network facilities, information systems and extended network products in a stable and reliable state of operation; and (2) network information security, concentrating on all types of network data (including the integrity, confidentiality and availability of all kinds of network data and personal information).

The Data Security Law focuses mainly on 'data processing activities and security monitoring'. Any data processing activity that may 'harm national security, public interests or the lawful rights and interests of citizens or organisations' will be subject to legal liability. The Personal Information Protection Law, namely China's equivalent of the GDPR (ie, the General Data Protection Regulation of the European Union), for the first time, provides a comprehensive set of rules on personal information protection.

From the perspective of corporate compliance, overseas entities processing data relating to any Chinese citizens or whose data processing activities may have an essential impact on China are also required to fulfil the data security obligations under the PRC laws. This provides the standing point to assert jurisdiction over multinational corporations' services to China whose data processing activities are outside China.

Regarding the enforcement initiatives in China, the MIIT is specifically responsible for the protection and regulation of network information security in industry and telecommunications, typically implementing regulatory initiatives such as testing and inspection, issuing rectification notices, informing and exposing, as well as organising downgrades. The SAMR (an agency directly under the State Council) is specifically responsible for consumer's personal information security. Public security authorities are responsible for criminal investigations of companies and staff suspected of committing crimes. Other governmental authorities of a given industry, such as the Cyberspace Administration of China (CAC) and the Ministry of Culture and Tourism, may lead or cooperate with other governmental agencies to conduct the law enforcement by means of issuing detailed rules, measures or standards and implementing these.

In 2021, the CAC launched the campaign called 'Operation Qinglang' (ie, 'clear and bright' in Chinese) to create a clean internet environment and to rectify the disorder in cyberspace, which has caused strong public concern. The emphasis has been on cleaning up illegal and immoral content, including 'porn, obnoxious, abnormal, fake, vulgar and gambling-related content', and on tackling chronic malpractice on online platforms, with a focus on live-streaming and short video platforms. Efforts have been made to bring under control 'internet trolling' and suppress the operation of antisocial internet accounts.

On 28 March 2023, the State Council Information Office of China held a press conference stating that 13 Qinglang campaigns were carried out in 2022, where more than 54.3 million pieces of illegal information were removed from the internet, more than 2,890 non-compliant apps were taken down and more than 7,300 non-compliant websites were shut down.

Law stated - 23 April 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

According to article 37 of the Cybersecurity Law of the PRC, personal information and important data collected and generated by operators of critical information infrastructures during their operations in China should be stored within the territory of the PRC. If, due to business needs, it is necessary to provide them outside the country, a security assessment shall be conducted in accordance with the measures formulated by the State Internet Information Department in conjunction with the relevant departments of the State Council.

Article 36 of the Data Security Law of the PRC stipulates that, absent of the approval from the competent authorities of the PRC, organisations and individuals within the territory of

the PRC shall not provide data stored in the territory to foreign judicial or law enforcement agencies.

In general, however, relevant data and information shall be stored locally. There are options available for such data and information transferred outside PRC, where pertinent enterprises with corresponding necessities for data cross-border transfer are able to choose the appropriate exit path according to their actual situation and business needs, as long as the transfer is in compliance with the following laws, regulations and guidelines: (1) the Cybersecurity Standards Practice Guidance – Security Certification Specification for Personal Information Cross-border Processing Activities, published on 24 June 2022 and taking effect on the same day; (2) the Data Outbound Security Assessment Measures, published on 7 July 2022; (3) the Measures on the Standard Contract for Outbound Transfer of Personal Information, published on 2 February 2023 and taking effect on 1 June 2023; (4) the Guide to Applications for Security Assessment of Outbound Data Transfers (Second Edition) and the Guide to the Filing of the Standard Contract for Outbound Transfer of Personal Information (Second Edition), published on 22 March 2024 and taking effect on the same day; and (5) Provisions on Promoting and Regulating Cross-border Data Flows, published on 22 March 2024 and taking effect on the same day.

Law stated - 23 April 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

According to the Industry Guidelines on Encouraged Foreign Investment and the Negative List of Access of Foreign Investment, foreign-invested companies are under restriction for conducting communication services in China and are subject to requirements imposed on acquiring telecoms licences.

Nevertheless, this restriction is starting to unravel. On 10 April 2024, the MIIT announced the Notice on the Pilot Scheme for the Further Opening of Value-Added Telecom Services to Foreign Investment (Pilot Scheme), aiming to expand opening-up in the telecoms and internet sector to foreign investors. At the initial stage, the Pilot Scheme will be implemented in four designated pilot zones: (1) the Beijing Municipality Service Sector Comprehensive Demonstration Zone; (2) the Shanghai Pilot Free Trade Zone Lin-gang Special Area and the Socialist Modernisation Leading Zone (also known as Pudong New Area); (3) the Hainan Free Trade Port; and (4) the Shenzhen Advance Demonstration Zone of Socialism with Chinese Characteristics (also known as Shenzhen).

In the pilot zones, restrictions on foreign equity in the following VATS (most of which are internet services) will be completely lifted: (1) internet data centres; (2) content distribution networks; (3) internet service providers; (4) online data processing and transaction processing services; (5) information publication platform and delivery services (excluding internet news, publishing, audio-video services and internet culture operations); and (6) information protection and processing services (collectively, Pilot VAT Services). Foreign investors will be allowed to wholly own companies engaging in Pilot VAT Services within the four designed pilot zones, on the condition that those foreign-invested telecoms and

internet companies shall: (1) apply for and obtain a telecoms or internet business operation pilot approval from the MIIT; (2) adhere to relevant laws, regulations and conditions stated in the approval; and (3) be subject to and cooperate with the supervision and management of telecoms and internet regulatory authorities.

Law stated - 23 April 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The fundamental laws governing the media sector are the Civil Code, the Electronic Commerce Law, the Advertising Law and the Cybersecurity Law. The administrative regulations promulgated at almost the same time include: (1) the Administrative Measures for the Security Protection of the International Network of Computer Information Networks; (2) the Regulations on the Security Protection of Computer Information Systems; (3) the Administrative Measures for Internet Information Services; (4) the Regulations on the Protection of the Right to Information Network Dissemination; (5) the Opinions on Promoting the Healthy and Orderly Development of the Mobile Internet issued by the General Office of the Central Committee of the Communist Party of China and the General Office of the State Council; (6) the Circular of the State Council on Authorizing the State Internet Information Office to Take Charge of the Administration of Internet Information Content; and (7) the Regulations on the Administration of Microblog Information Services.

In addition, the relevant governmental agencies promulgated several regulations and issued judicial interpretations in this regard. These include: (1) the Regulations on the Administration of Internet Audiovisual Program Services; (2) the Regulations on the Administration of Internet News Information Services; (3) the Regulations on the Work of Interviewing Internet News Information Service Units; (4) the Implementation Rules for the Administration of Internet News Information Service Licences; (5) the Regulations on the Administration of Live Internet Broadcasting Services; and (6) the Measures on Administrative Protection of Internet Copyright.

In recent years, several laws and regulations in the fields of livestreaming and short videos were unveiled in China to address the industrial transformation. In addition, local regulations were introduced in relation to livestreaming regions where the livestreaming industry is well developed across the country. Meanwhile, some industrial associations published industrial standards to guide pertinent market players' business operations. For example, China Netcasting Services Association issued Detailed Rules on the Censorship Standards for Online Short Video Content in December 2021 and China Advertising Association issued the Code of Conduct in Livestreaming Promotion in June 2020.

Law stated - 23 April 2025

Ownership restrictions

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18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

According to article 6 of Regulations on Administration of Foreign-funded Telecommunications Enterprises (revised in 2022), with respect to foreign-invested telecommunications enterprises that operate value-added telecommunications services (including basic telecommunications services in the wireless paging business), the proportion of foreign investors in the capital contribution of such enterprise shall not exceed 50 per cent, except as otherwise provided by the state. It also specifies basic requirements of the Chinese and foreign parties that intend to conduct telecommunications businesses, as well as the process of applying for a licence, along with the required application materials.

Given that the TMT industry falls into the restricted category for foreign investors, a foreign investor-backed enterprise typically adopts the contractual control structure (also known as a VIE (variable interest entity) structure) to engage in the TMT industry in China. The basic concept for employing the VIE structure is to circumvent China's restrictions on foreign investment by intentionally splitting the business into two entities: an offshore SPV and an onshore operating entity. The operating entity resides in China and holds the licences and other assets needed to conduct a TMT business in China. The foreign investors are entitled to purchase shares of the offshore SPV that aims to list overseas in the future. The foreign investors indirectly control the onshore operating entity through a set of legal contracts rather than the shareholding structure.

Law stated - 23 April 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Enterprises producing or distributing TV dramas, animations, feature films, TV variety shows, documentaries, radio dramas, online TV dramas, online movies, online variety shows, short videos and other radio and TV network audiovisual programmes are required to obtain a licence for producing and distributing radio and TV programmes. The valid term of this licence is two years. The State Administration of Radio, Film and Television (SARFT), as the approval authority, shall make a decision of approval or disapproval within 20 working days of receiving complete application materials from an enterprise.

Law stated - 23 April 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

Yes, according to the Provisions on the Administration of Import and Broadcast of Overseas TV Programmes, the import and broadcast of foreign movies, TV dramas (including TV cartoons) and other types of TV programmes such as educational, scientific and cultural programmes on TV stations shall be subject to approval from the SARFT. Although the types of programmes regulated by this law are limited to those broadcast by TV stations, in practice, the import of overseas programmes displayed on internet video sites shall also be subject to the examination and approval of the SARFT. In addition, the import of current affairs and news programmes is not permitted.

Law stated - 23 April 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

In general, the Advertising Law of the PRC (revised in 2021) and the Regulations on the Control of Advertising are applicable to both traditional and online advertising, providing overarching rules regulating the content of advertising, competitive behaviour, rates and display methods. Local governmental authorities also stipulate rules on regulating and governing regional advertising based on those laws and regulations.

On 25 February 2023, the SAMR promulgated the Measures on the Administration of Internet Advertising, which came into effect on 1 May 2023. The measures were revised based on the Interim Measures on the Administration of Internet Advertising formulated in 2016 and adapted to address the new trends and requirements of the industry. Overall, the measures refine the responsibilities of Internet advertising business entities by clarifying pertinent behavioural norms. To be specific, the measures regulate pop-up advertisements, open-screen advertisements and the use of smart devices to publish advertisements. It also refines the rules for regulating advertising through soft text, by means of algorithmic recommendations and using livestreaming.

Law stated - 23 April 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

There are no such regulations in China. However, it is the typical business practice that certain channels operated by China Media Group along with provincial satellite TV channels are pre-installed on TV sets during the manufacturing process in China. Relevant costs are borne by the consumer.

Law stated - 23 April 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

In China, there are several rules regulating the delivery of new media content given its unique characteristics.

In 2019, the Cyberspace Administration of China (CAC) promulgated the Provisions on the Governance of Online Information Content Ecology, aiming to create a healthy network ecology, protect the legitimate rights and interests of citizens, legal persons and other organisations, and safeguard national security and public interests. The provisions make it clear that users and producers of network information content services and platforms shall not engage in illegal activities such as online violence, pornography searches, in-depth forgery, data falsification and account manipulation. Internet information content producers shall avoid and resist the production, reproduction and publication of undesirable information that contains 'the use of exaggerated headlines, the content of which is seriously inconsistent with the headlines and speculation of gossip, scandals, bad news'. Also, self-publishers and online platforms shall fulfil requirements of self-censorship by proactively screening and filtering undesirable information.

With respect to illegal content posted on the network, in addition to the application of regulations and standards for traditional media industry contents, the Cybersecurity Law of the PRC also serves a crucial role in this regard. According to article 6 of the Cybersecurity Law, the state advocates honest and trustworthy, healthy and civilised network behaviour, promotes the dissemination of socialist core values and takes measures to improve the awareness and level of network security of the whole society and the formation of a good environment for the whole society to participate in promoting network security. In practice, any online content in violation of the law shall be deleted and blocked.

Law stated - 23 April 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

China completed the conversion from analogue to digital broadcasting when China's analogue to TV signal shut down on 31 March 2021, which ushered in the era of the digital terrestrial TV. The freed-up frequencies have been redesignated to mobile communication services.

Law stated - 23 April 2025

Digital formats

25 Does regulation restrict how broadcasters can use their spectrum?

Generally, broadcasters are assigned to a specific FM channel and are allowed to broadcast on that channel. Some channels have HD services and data services, which are assigned and supervised by the state authorities. According to article 18 of the Regulations on Administration of Radio and Television, the administrative department of radio and television under the State Council is responsible for designating the frequencies in the dedicated frequency bands for radio and television and issuing certificates of dedicated frequency assignments.

Law stated - 23 April 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

There is no process for assessing or regulating media plurality or any specific legislation regarding media plurality in China.

Law stated - 23 April 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

The Chinese government mainly regulates the media on topics relating to politics, obscene pornography, terrorism and ethnic hatred. The censorship system in China generally consists of prior prohibition, self-censorship and post-event pursuit of punishment. With respect to online content, the CAC is the governmental authority in charge of censoring contents published by online media.

On 15 December 2019, the CAC promulgated the Provisions on the Governance of Online Information Content Ecology, which came into effect on 1 March 2020 and is considered one of the most comprehensive and rigorous systems of online censorship and information control initiatives introduced in China.

Law stated - 23 April 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The regulatory authorities include: (1) the State Anti-monopoly Bureau; (2) the State Administration of Radio and Television – for media regulation; and (3) the Ministry of Industry and Information Technology – for telecoms regulation.

These agencies are separate from each other.

If various administrative authorities disagree on the jurisdiction among themselves, the administrative authorities may report to the common higher administrative authorities for designation of jurisdiction. The legal basis is article 25 of the Administrative Punishment Law of the PRC, according to which, where two or more administrative organs have jurisdiction over a case, the case shall be under the jurisdiction of the administrative organ that first places the case on file.

If a dispute arises over jurisdiction between various administrative organs, the matter shall be resolved through consultation. If consultation fails, the matter shall be reported to their common administrative organ at the next higher level for designation of jurisdiction; or the jurisdiction at issue may be directly designated by their common administrative organ at the next higher level.

Law stated - 23 April 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

According to the provisions of the Administrative Procedure Law of the PRC and the Administrative Reconsideration Law of the PRC (revised in 2023), with respect to administrative cases falling within the scope of the people's courts, citizens, legal persons or other organisations may first apply to the administrative authority for reconsideration and then file a lawsuit in the people's court if they are not satisfied with the reconsideration decision; or they may file a lawsuit directly in the people's court.

The conditions, procedures and decisions of citizens applying for administrative reconsideration are stipulated in detail in the Administrative Reconsideration Law of the PRC. If the applicant is not satisfied with a specific administrative act of a working department of the local people's government at or above the county level, the applicant may, at their own discretion, apply for administrative reconsideration to the people's government at the department's own level, or apply for administrative reconsideration to a competent department at a higher level. If the applicant is not satisfied with the specific administrative acts of the administrative organs under the vertical leadership such as customs, finance, state taxation, foreign exchange management and state security organs, they may apply for administrative reconsideration to the competent department at the next higher level.

Law stated - 23 April 2025

Competition law developments

|

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

Generally speaking, the Chinese anti-monopoly law sits on three pillars:

- merger control;
- prohibition on market abuses; and
- prohibitions on monopolistic agreements.

In 2022, China National Knowledge Infrastructure (CNKI), the largest online academic database company in China, was fined 87.6 million yuan for monopolistic behaviour. The State Administration for Market Regulation (SAMR) stated that since 2014, CNKI abused its dominant market position to sell its database services at increasingly high prices. It also restricted academic journals' and universities' ability to authorise the use of data to third parties through the signing of exclusive cooperation agreements. Despite the already high fees for its services, CNKI continued to increase its prices, with an annual average increase of about 10 per cent imposed for years. According to the SAMR, this behaviour impeded competition in China's academic database service market, infringed on the legitimate rights and interests of users and affected the innovation and development of related markets and academic exchanges – leading the SAMR to impose a fine equivalent to 5 per cent of CNKI's domestic revenue in 2021.

From 27 June 2022 to 27 July 2022, the SAMR researched and drafted a series of rules and regulations for the purposes of determining and regulating specific monopoly behaviours in practice. On 10 March 2023, the SAMR formally issued the following rules and regulations: (1) the Provisions on Restraining the Abuse of Administrative Power to Exclude or Restrict Competition; (2) the Provisions on Prohibition of Monopoly Agreements; (3) the Provisions on Prohibition of Abuse of Market Dominance; and (4) the Provisions on the Review of Concentrations of Undertakings, all of which took effect on 15 April 2023.

Law stated - 23 April 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Egypt is one of the three largest economies in Africa and is strategically positioned at a crossroads between the East and the West, making the country a significant player in international trade in the Middle East and Africa. Egypt is home to the Suez Canal, which connects the Mediterranean Sea with the Red Sea and is a key artery in global trade.

The total area of Egypt is 1,001,450 square kilometres, including 995,450 square kilometres of land and 6,000 square kilometres of water. According to the Egyptian Central Agency for Public Mobilisation and Statistics, the population reached more than 107 million people in 2025. Egypt is divided into 27 governorates, 217 cities and 4,617 villages. The governorates with the highest population are Cairo (9.7 per cent), Giza (9 per cent) and Sharqiyya (7.5 per cent).

The Egyptian government has worked hard to attract more foreign direct investment (FDI) into the country. These efforts resulted in the recognition of Egypt as one of the top five destinations globally for greenfield FDI in 2016. In 2021, Egypt was named as one of the top 17 African countries with a tech ecosystem, according to *fDI Intelligence* in its report 'African Tech Ecosystems of the future 2021/2022'.

Egypt replaced South Africa as the second-ranked destination by projects in the region, experiencing a 60 per cent increase in the number of projects from 85 to 136, which cover both the Middle East and Africa. Software and IT services came out top of the project sectors.

Furthermore, Egypt managed to top all ranked countries in the Middle East and Africa for capital investment in 2019 by acquiring 12 per cent capital investment with a total value of US$13.7 billion.

Despite international and local crises faced by the country over the years, including revolutions, the covid-19 pandemic, the Russia–Ukraine war, the Israeli–Palestinian conflict, inflation, devaluation of the Egyptian pound, foreign currency shortage and the threat of potential recession, Egypt has maintained strong liquidity and financial status as a result of FDI.

The telecom sector in Egypt is primarily governed by Telecommunication Regulation Law No. 10/2003 (the Telecoms Law). Also, there are several other key laws and regulations related to the telecom sector, including the following (as amended to date):

- Penal Code No. 58/1937;
- Presidential Decree No. 236/1985 approving the International Telegraph (currently Telecommunication) (ITU) Convention, which entered into force in Egypt on 10 October 1985;
- Presidential Decree No. 379/1999 regulating the Egyptian Ministry of Communication and Information Technology (MCIT);

- E-signature Law No. 15/2004 and its Executive Regulation;
- Economic Court Law No. 120/2008;
- Anti-Cybercrime Law No. 175/2018 (Anti-Cybercrime Law); and
- Personal Data Protection Law No. 151/2020 (the Data Protection Law).

The National Telecommunication Regulatory Authority (NTRA) is mainly empowered by the Telecoms Law to regulate and enhance telecommunication services in Egypt. In addition to the NTRA, other key entities are involved in the telecom sector, namely:

- the MCIT, which is empowered by Presidential Decree No. 379/1999 to, inter alia, expand, regularly develop and improve communication and information services as well as encourage investment in the telecom sector based on the antitrust basis;
- the Information Technology Industry Development Agency, which is empowered by the E-signature Law to, inter alia, promote and develop the information technology and communication industry, support small and medium-sized enterprises in using e-transaction and regulating e-signature services activities; and
- the Economic Court has executive jurisdiction over settling litigation related to the Telecoms Law.

Law stated - 9 April 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

Under the Telecoms Law, no one is allowed to establish or operate any telecom network, provide any telecom service to third parties, transmit international calls or announce doing so unless a licence is obtained from the NTRA.

The term 'telecom' is defined by the Telecoms Law as 'any means of sending or receiving signs, signals, messages, texts, images or sounds of whatsoever nature and whether the communication is wired or wireless'.

The restriction above distinguishes between the different types of telecom services and includes only one exception for establishing or operating a private network that does not use a wireless system.

In practice, telecom services are generally classified as follows:

Main service	**Sub - service**
Fixed services	Fixed telephony
Virtual fixed telephony	
Access	

International services	International gateway
International submarine cable	
Data services	Class A
Class B	
Class C	
Global peering	
Registrar	
Cellular	Mobile services
Bulk SMS (one to many)	
Value - Added Service (VAS)	
Wireless trunk	
Nilesat	
Very - small - aperture terminal (VSAT)	
Satellite services	Global mobile personal communications services (GMPCS)
	Navigation services (aviation or maritime)
Infrastructure leasing	Infrastructure
Towers	
Automatic vehicle location	
Accounting authorities	
Wireless institutes	

The licence of each telecom service allows the relevant licensees to provide such service within a very specific scope.

Generally, all licences are granted under a licence agreement with the NTRA noting that all licences for major services (eg, fixed telephony and cellular) are granted by the NTRA through a bidding process. However, the other licences may be granted by the NTRA upon request. This request is required to be assessed from a different perspective including, inter alia, the market demand and financial and technical adequacy of the applicant.

Licences are granted for a period between one and 15 years, depending on the services that are the subject of such licences.

The NTRA applies a different fee structure for issuing licences for each type of service as per the following examples:

Service	**Applicable fees and security**
Wireless infrastructure leasing	• a one - time licensing fee of 50,000 Egyptian pounds; • 3 per cent of the total annual revenues; • a licence burden annual fee of 10,000 Egyptian pounds plus the inflation rate declared by the Central Bank of Egypt (CBE); and • a performance bond of 500,000 Egyptian pounds.
Registrar	• a one - time licensing fee of 50,000 Egyptian pounds; • 3 per cent of the total annual revenues; • a licence burden annual fee of 10,000 Egyptian pounds plus the inflation rate declared by the CBE; and • a performance bond of 20,000 Egyptian pounds.
GMPCS	• no one - time licensing fee; • 3 per cent of the total annual revenues; • a licence burden annual fee of 1,000 Egyptian pounds plus the inflation rate declared by the CBE;

	• annual charges for the equipment of the licensee's subscribers; and • a performance bond of 150,000 Egyptian pounds.
Access	• a one - time licensing fee of 1 million Egyptian pounds; • 8 per cent of the total annual revenues; • a licence burden annual fee of 500,000 Egyptian pounds plus the inflation rate declared by the CBE; • annual charges for the equipment of the licensee's subscribers; and • a performance bond of 50 million Egyptian pounds.
Class A	• no one - time licensing fee; • 3 per cent of the total annual revenues; • a licence burden annual fee of 10,000 Egyptian pounds plus the inflation rate declared by the CBE; and • a performance bond of 500,000 Egyptian pounds.
Class B	• no one - time licensing fee; • 3 per cent of the total annual revenues; • a licence burden annual fee of 10,000 Egyptian pounds plus the inflation rate declared by the CBE; and • a performance bond of 150,000 Egyptian pounds.
Global peering	• no one - time licensing fee; • 3 per cent of the total annual revenues; •

	a licence burden annual fee of 10,000 Egyptian pounds plus the inflation rate declared by the CBE; and • a performance bond of 200,000 Egyptian pounds.
Bulk SMS (one to many)	• a one - time licensing fee of 500,000 Egyptian pounds; • 3 per cent of the total annual revenues; • a licence burden annual fee of 1,000 Egyptian pounds plus the inflation rate declared by the CBE; • annual charges for the equipment of the licensee's subscribers; and • a performance bond of 500,000 Egyptian pounds.
VAS	• an upfront royalty fee of 3 million Egyptian pounds; • 3 per cent of the total annual revenues; • a licence renewal fee of one million Egyptian pounds; • a licence and liability fee of 20,000 Egyptian pounds; and • a cash deposit guarantee of 500,000 Egyptian pounds.
VSAT	• no one - time licensing fee; • 3 per cent of the total annual revenues; • frequency charges to be determined on a case - by - case basis; • a licence burden annual fee of 1,000 Egyptian pounds plus the inflation rate declared by the CBE; and • a performance bond of 100,000 Egyptian pounds.

Law stated - 9 April 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

All spectrum licences generally specify the permitted use and are not tradeable or assignable, fully or partly, under the Telecoms Law unless prior approval is obtained from the NTRA. Also, all licence agreements include a change of control restriction, so that the licensee may not even merge with any third party unless prior written approval is obtained from the NTRA.

Law stated - 9 April 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

All licences are required, under the Telecoms Law, to include several ex-ante provisions concerning transparency, price control, cost accounting, accounting separation, access to and use of specific network facilities and non-discrimination.

For example, the NTRA has the right to review any audited financial statement including, inter alia, appointing an auditor other than the licensee's auditor to review the said financial statement. Furthermore, each licensee is required to obtain an approval from the NTRA before applying tariffs or changing them.

Law stated - 9 April 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

According to the Telecoms Law, all licensed operators are required to not support one service in favour of another service. All licensed operators are required to comply with the ITU's recommendations and international standards. That said, if, for any reason, a structural or functional separation is required as per the NTRA's instructions, the ITU's recommendation or international standards, the relevant operator should comply with this requirement.

The first time the NTRA introduced structural or functional separation was for Telecom Egypt to ensure its non-discriminatory behaviour.

Law stated - 9 April 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

According to the Telecoms Law, the provision of any telecom service must be based on four principles, one of which is the availability of the universal service.

The NTRA is required by the Telecoms Law to transfer its budget's surplus, except for the amount allocated to the state by the Cabinet of Ministers, to the Universal Service Fund on an annual basis. Any amounts to be transferred to the Universal Service Fund must be utilised on, inter alia, (1) infrastructure projects required for establishing the universal service, (2) reallocation of the frequency spectrum, (3) indemnifying telecom services operators and providers for price differences between the approved economical price for the services and that which may be determined in favour of the telecom consumers.

Law stated - 9 April 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

There is a specific number allocation plan adopted by the NTRA, which is updated from time to time depending on the increase of telecom service subscribers in Egypt, whereby each operator has a dedicated first two to three digits. There are also dedicated numbers for emergency services (eg, ambulance, police and fire brigade).

There is also a mobile number portability regulation adopted by the NTRA whereby mobile subscribers may freely shift between operators without losing their numbers. This regulation includes several mandatory terms and conditions applied to both operators and subscribers.

Law stated - 9 April 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Yes, all telecom service providers are required to have written contracts with their customers in Egypt. These written contracts are required to follow the form approved by the NTRA and cover, inter alia:

- the type of services that are subject to the customer agreement;
- the confidentiality requirement for the customers' data and communications;
- the terms of payment including interest, administrative fees, tax and any other burdens;
- the duration and its renewal;
- rights in the case of default or termination; and
- the agreement is personal and may not be assigned to any third party without the approval of the licensed telecoms provider.

Any violation of the requirements above will result in a penalty from the NTRA as per the Penalties Regulation. For example, in 2016, the NTRA imposed a penalty of 250,000 Egyptian pounds on Etisalat Misr for not complying with this mandatory requirement.

Law stated - 9 April 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

The provision of telecom services in Egypt must always be based on transparency; therefore, internet service providers may not control or prioritise the type or source of data they deliver.

The Administrative Courts rendered a judgment ordering the NTRA to block pornographic content; however, the NTRA challenged this judgment on the basis that the Telecoms Law does not grant this power to the NTRA.

However, the Anti-Cybercrime Law allows the competent authorities in Egypt to block any website that is broadcast from Egypt or abroad if that website contains any statements, digits, images, videos or any other advertising material that is deemed a crime under the Anti-Cybercrime Law. This blockage is subject to judicial review within 24 hours.

Law stated - 9 April 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

Digital platforms are mainly regulated by the following:

- the Telecoms Law;
- Law No. 180/2018 regarding press, media and the Supreme Council of Media (SCoM) Regulation (the Media Law) and its Executive Regulation; and

- SCoM Decree No. 26/2020, issuing the SCoM Licensing Regulation (the Media Licensing Regulation).

Digital platforms may not be created unless a licence is obtained from the SCoM. This licence also requires an approval from the NTRA.

According to the Media Licensing Regulation, companies carrying out any business activity related to creating digital or satellite platforms must be owned by the state with a minimum authorised capital of 50 million Egyptian pounds.

Law stated - 9 April 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

There is no specific well-developed regulation yet applicable to NGA networks. However, our law firm obtained the first-ever authorisation from the NTRA for using a wide area network or Multiprotocol Label Switching in Egypt.

The main general regulatory requirement, as currently adopted by the NTRA, is that NGA networks must be implemented by a licensed provider of Class A services.

Law stated - 9 April 2025

Data protection

12 Is there a specific data protection regime applicable to the communications sector?

There are two main laws in Egypt governing the use, collection, storage, transfer and protection of personal data in Egypt as follows.

Data Protection Law

The Data Protection Law applies to any personal data that is subject to any electronic processing whether partially or entirely.

The Personal Data Law shall not apply to any personal data that is being:

- saved by natural persons for third parties and that is processed for personal usage only;
- processed for official statistics purposes or in the application of laws or regulations in Egypt;
- exclusively processed for media purposes and provided that the said personal data is correct and accurate and not to be used for any other purposes without prejudice to any applicable press and media regulations in Egypt;

- related to judicial seizure records, investigations and lawsuits;
- held by the national security authorities; and
- held by the CBE and the entities that are subject to its control and supervision except for money transfer and forex companies provided that they take into account the rules established by the CBE regulating personal data.

It is worth noting that any entity that is subject to the Data Protection Law is required to legitimise its position with the provisions of the said Data Protection Law within a year starting from the issuance date of its Executive Regulation, which has not yet been issued.

Furthermore, as part of Soliman, Hashish & Partners' membership to the American Chamber of Commerce in Egypt, the authors attended a high-level discussion with regard to Egypt's New Personal Data Protection Law with key representatives from the Ministry of Communication and Information Technology overseeing the issuance of the Executive Regulation and establishment of the Data Protection Centre, whereby it was confirmed that the issuance of the Executive Regulation is subject to the establishment of the regulator first being the Data Protection Centre.

It was re-confirmed during the meeting that the Executive Regulation is already in an agreed form and ready for issuance; however, the Executive Regulation will only be issued after the establishment of the Data Protection Centre, noting that the following phases will very likely be followed by the government as highlighted during the said meeting:

- pre-launching phase: this phase will likely involve policy settling, guidelines and framework, capacity building and awareness, expert consultation and international relations;
- issuance of the Executive Regulation: this phase will likely involve expert consultation, policy harmonisation, collaboration, licensing permits and accreditation, data protection officer registration, cross-border data transfer, sector-specific guidance and international relations; and
- grace period for legitimisation with the Executive Regulation: during this phase, the persons who are subject to the Data Protection Law are granted, by law, one year as of the issuance date of the Executive Regulation to legitimise their position with the Executive Regulation.

Anti-CybercrimeLaw

According to the Anti-Cybercrime Law , any person, whether a natural or legal person, that uses, collects, or processes personal data whether a natural or legal person shall maintain the privacy of the data stored and not disclose the same without an order of a relevant judicial authority.

Furthermore, any IT services provider shall retain and store users' data for at least 180 days continuously including identification, the content of services' system, communication traffic, terminals and any other data required by the NTRA.

In addition to the Data Protection Law and the Anti-Cybercrime Law, few other laws deal with special nature personal data such as the Telecoms Law, whereby telecom services providers are required to ensure and maintain the confidentiality of any customer's data.

Law stated - 9 April 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

Yes, the Anti-Cybercrime Law concerns any person providing, directly or indirectly, users with any information technology and telecom service including, inter alia, processing or data storage. These providers are required to retain and store users' data continuously for at least 180 days, including identification, the content of the services' system, communication traffic, terminals and any other data required by the NTRA.

Law stated - 9 April 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

Unfortunately, there is no special regulation yet for big data. However, it is within the NTRA's ongoing strategy to regulate it.

Law stated - 9 April 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

Consumer Protection Law No. 181/2018 and its Executive Regulation require all providers of services and products in Egypt, except for the entities that are subject to the supervision of the CBE and the Egyptian supervisory authority, to have all advertising, data, information, documents, invoices, receipts, contracts including e-documents with the consumer to be in Arabic or bilingual or multilingual form, providing that Arabic must be one of these languages.

Law stated - 9 April 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

By the end of 2022, the Telecom Law was amended to extend the prohibition of the importation, manufacturing, assembling telecommunication equipment without a permit, to also possessing, using, operating or installing or marketing any telecommunication equipment until after obtaining a permit from the relevant authorities, being the NTRA and national security authorities. It increased the penalty for the violation of such requirement to a financial penalty between 2 to 5 million Egyptian pounds.

It is worth noting that Egypt aims to be a significant information and communications technology hub in the Middle East and North Africa, with the New Administrative Capital (NAC) being built as one of the many smart-city projects that are attracting and simulating investments into 5G and fibre broadband in Egypt. This comes in addition to the adoption of many internet of things and artificial intelligence solutions. One of the largest telecom companies in Egypt, Etisalat, plans on launching 5G in the NAC. In 2022, it was reported that the 5G trials – that were supposed to be held in Egypt – mainly focused on the NAC.

Thanks to Egypt's strategic geographical position, the international cable infrastructure became an important asset to the country. In 2021, Telecom Egypt, Egypt's first integrated telecom operator and one of the largest subsea cable operators in the region, planned to launch Hybrid African Ring Path by 2023, which is a new subsea system that will encircle the African continent. The system will connect Africa's eastern and western bounds to Europe, spanning South Africa, Italy and France along the continent's east coast, and to Portugal along its west coast. Highly reliable terrestrial routes will connect the cable landing points within South Africa, Europe and Egypt, forming a complete ring around the continent. It is worth noting that, the 2Africa Cable had already made landing at Telecom Egypt's cable landing station in Ras Ghareb on the eastern coast of Egypt in November 2022. The latest landing of 2Africa Cable was in Port Said, at the northern end of the Suez Canal on Egypt's Mediterranean coast in April 2023.

Furthermore, in January 2023, Telecom Egypt – in connection with Huawei Technologies, the world's leading provider of information and communication technology, infrastructure and smart devices – announced the activation of the first eco-friendly wireless network tower made of fibre-reinforced polymer. This deal has resulted in Telecom Egypt being the first telecom operator in Africa to activate and install such a tower. This green tower emits less CO2 and is more environmentally friendly while contributing to improving the signal quality in comparison to standard antennas.

In late 2023, Telecom Egypt signed an agreement with the Internet Corporation for Assigned Names and Numbers (ICANN) to install and operate the ICANN Managed Root Server in the Egyptian company's regional data hub to speed up internet in Egypt. According to Speedtest by Ookla, Egypt ranked99th globally for mobile speed and 86th for fixed broadband speed during March 2024.

In March 2024, agreements were enforcedby the Information Technology Industry Development Authority, the executive IT arm of the Ministry of Communication and Information Technology, Telecom Egypt and three private companies including El-Sewedy Electrometer, El-Araby and a consortium of Bio Business Company, and HitekNOFAL Optics for the local manufacturing of routers.

More recently, in late 2024 and early 2025, proposed measures were announced to restrict the import of mobile phones from abroad and encourage domestic products. The NTRA is considering implementing an application mechanism for the operation of imported mobile

phones into Egypt starting from 2025 and providing customers a grace period to reconcile. Otherwise, imported mobile phones with serial numbers unregistered at the NTRA will cease to work.

Furthermore, a Wifi calling service that allows mobile phone calls to be made via fixed internet networks was rolled out more recently in Egypt, with the aim of enhancing call quality and telecom services purposes.

Law stated - 9 April 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The media sector is governed by various laws and regulations, including the following:

- Investment Law No. 72/2017 and its Executive Regulation (the Investment Law);
- Law No. 180/2018 regarding press, media and the Supreme Council of Media (SCoM) Regulation (the Media Law);
- Prime Minister Decree No. 411/2000 establishing the Media Public Free Zone (MPFZ); and
- SCoM Decree No. 26/2020, issuing the SCoM Licensing Regulation (the Media Licensing Regulation).

Most of the key media projects in Egypt operate inside the MPFZ, which is a public free zone governed by various directives of the Chairman of the General Authority for Investment (GAFI).

All projects operating under the Investment Law are qualified by a large number of investment incentives.

For any media project to be qualified for operation inside MPFZ, the project must, in general, take a specific legal form and must comply with the Arab Media Ethical Charter and MPFZ's Business Controls and Principles.

The services generally allowed to operate inside the MPFZ include, inter alia, radio, television, information broadcasting, e-content production and marketing. The MPFZ may also authorise hotels, banks and malls to operate inside the MPFZ to provide their services to the licensed media projects.

According to the Media Law and the Media Licensing Regulation, which was published on 13 May 2020, SCoM is empowered, inter alia, to:

- receive notification for establishing Egyptian newspapers or non-Egyptian newspapers that are issued or distributed in Egypt;
- grant licences to visual, audio or digital channels that are either registered in Egypt with GAFI or non-Egyptian channels that are being broadcast from Egypt;
- determine and apply the rules and requirements protecting the audience in Egypt;

- grant licences to broadcast relay stations, websites, digital and satellite platforms, fibre satellite distribution and content distribution;
- authorise the importation of satellite and internet broadcasting devices; and
- authorise the importation of non-Egyptian prints.

Law stated - 9 April 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

According to the Media Law and the Media Licensing Regulation, which was published on 13 May 2020, foreign ownership restrictions apply to holding the majority stake or any stake giving the right to manage any Egyptian satellite or terrestrial television, as well as any Egyptian digital, wired or wireless station. However, non-Egyptian satellite and terrestrial television as well as non-Egyptian digital, wired and wireless stations may be licensed to operate in Egypt, provided that an approval is obtained from the SCoM. This approval requires, inter alia, operating inside a specific media area, the ability to block any content involving, inter alia, violence, suicide, self-harm or nudity.

According to the Media Law and Media Licensing Regulations, non-Egyptian shareholders of newspapers or media outlets, whether natural or legal persons, may not own a percentage of shares that entitles them to the right of management, nor may they dispose of the newspaper or a share thereof, in whole or in part, to third parties or merge with or into another entity without obtaining prior written approval from the SCoM.

Law stated - 9 April 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

According to the Media Law and Media Licensing Regulation, which was published on 13 May 2020, a licence from the SCoM is required for any company to be in a position to operate a broadcast relay station in or to Egypt. This licence requires the following:

- payment of 250,000 Egyptian pounds to the SCoM;
- obtaining an approval from the National Telecommunication Regulatory Authority; and
- incorporation of a company in the form of a sole person company, limited liability company or joint-stock company with a minimum authorised capital of 5 million Egyptian pounds.

If the licence request is accepted, it should be valid for five years, renewable upon a request at least six months before the end of the said five years.

Law stated - 9 April 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

According to the Media Law and the Media Licensing Regulation, which were published on 13 May 2020, a licence from the SCoM is required for any company to be in a position to operate and distribute recorded or live content in Egypt, whether through satellite or the internet. This licence requires the following:

- payment of 500,000 Egyptian pounds to the SCoM for the company and 50,000 Egyptian pounds for each website; and
- incorporation of a company in the form of a sole person company, limited liability company or joint-stock company with a minimum authorised capital of 50 million Egyptian pounds;

If the licence request is accepted, it should be valid for five years, renewable upon a request at least six months before the end of the said five years.

All content must, inter alia:

- comply with the Egyptian Constitution, applicable laws, regulations and professional codes and ethics; and
- be stored for at least one year and hosted by a server that is located at a secure location in Egypt, which location may not be changed without prior approval from the SCoM.

Law stated - 9 April 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

The Media Law and the Media Licensing Regulation, which were published on 13 May 2020, differentiate between Egyptian and non-Egyptian media advertising companies as follows:

For Egyptian media advertising companies:

- a licence is required from the SCoM;
-

non-Egyptians may not hold any majority stake or any other stake that allows them to manage the company;

- the company must be incorporated in the form of a sole person company, a limited liability company or a joint-stock company with a minimum authorised capital of:
    - 100,000 Egyptian pounds for holding websites;
    - 5 million Egyptian pounds for general or news television stations;
    - 2 million Egyptian pounds for specialised television stations;
    - 15 million Egyptian pounds for each broadcasting station; and
    - 2.5 million Egyptian pounds for each electronic, television station or channel; and
- shareholders must subscribe to at least 35 per cent of the company's capital.

For non-Egyptian media advertising companies:

- an approval is required from the SCoM;
- this approval requires, inter alia, operating inside a specific media area, the availability of blocking any content involving, inter alia, violence, suicide, self-harm or nudity; and
- payment of the licensing fee as per the following table.

Fee (Egyptian pounds)	**Type of media**
One million	General and news media
500,000	Specialised media
100,000	general website
3 million	• social networking or promoting an individual's websites; • audio, video and text service on demand websites; and • goods, products and services marketing websites.
100,000	Any other website

Law stated - 9 April 2025

Must-carry obligations

Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

The Media Law and the Media Licensing Regulation, which were published on 13 May 2020, do not specify any must-carry obligations or a mechanism for financing the cost of such obligation.

Law stated - 9 April 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

New media content is subject to the same regulation as advertising.

Law stated - 9 April 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The digital switchover started in Egypt in 2013. The National Telecommunication Regulatory Authority (NTRA) is empowered under Telecommunication Regulation Law No. 10/2003 to reallocate and manage radio frequencies.

Law stated - 9 April 2025

Digital formats

25 Does regulation restrict how broadcasters can use their spectrum?

No.

Law stated - 9 April 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

The Media Law and the Media Licensing Regulation, which were published on 13 May 2020, do not specify any process of media plurality in Egypt.

Law stated - 9 April 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

The Media Licensing Regulation entered into force in Egypt on 14 May 2020. It does not involve any practice in Egypt yet, and includes several provisions that need clarification on how they will be applied in practice.

However, it is worth noting that, SCoM is currently drafting new legislation that would require social media platforms to obtain a licence to access mobile users in Egypt, as announced by the head of the SCoM Karam Gabr in January 2023.

Law stated - 9 April 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

According to Antitrust Law No. 3/2005, as amended (the Antitrust Law), the Egyptian Competition Authority (ECA) is the competent regulator for antitrust. However, there has been a dispute between the ECA and the National Telecommunication Regulatory Authority (NTRA) regarding jurisdiction over any antitrust issue related to the telecoms sector.

Law No. 180/2018 regarding press, media and the Supreme Council of Media (SCoM) Regulation (the Media Law) also grants SCoM the power to guarantee freedom of competition and to prevent dominant practices within the media sector. This is similar to the provisions included in Telecommunication Regulation Law No. 10/2003 and, given that the Media Law was just issued, we are not sure if there will be a dispute between the ECA and the SCoM as there has been between the ECA and the NTRA.

However, in all cases, the Egyptian administrative litigation courts have the jurisdiction to order which authority is the competent one.

Law stated - 9 April 2025

Appeal procedure

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29 | How can decisions of the regulators be challenged and on what bases?

All decisions of the regulator are subject to the review of the administrative litigation courts if these decisions are not in line with the applicable laws or reasonable. The administrative litigation courts have the jurisdiction to assess the validity or legality of each decision.

Furthermore, in the case of a dispute between the NTRA and any licence, the licensee may resort to arbitration under most of the telecom licence agreements.

Law stated - 9 April 2025

Competition law developments

30 | Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

In December 2022, the Antitrust Law was amended by Law No. 175 of 2022, whereby these amendments have replaced the post-notification regime of notifying certain transactions to the ECA within 30 days after entering into the transaction, to a pre-merger control system, whereby the ECA is given the authority to review and approve proposed mergers and acquisitions prior to entering into the transaction.

The new pre-merger control requires pre-approval from the ECA for transactions that constitute 'economic concentration' between the contracting parties (namely, a change in control or material influence of a person resulting from a merger, acquisition or joint venture).

It is worth noting that the amended Executive Regulations of the said amended Antitrust Law, were issued in early April 2024, whereby such amendments officially entered into force as of 1 June 2024, and the pre-approval from the ECA is now required for any transaction meeting the stipulated conditions.

In September 2021, the NTRA and the ECA signed a memorandum of understanding to form a joint executive committee to enhance free competition practices in Egypt's telecom market. This cooperation reflects both authorities' interest and goals in the welfare of the telecom market and the consumer in Egypt.

This cooperation would create and provide companies operating in the telecom sector with a fair environment, which would enable such companies to operate on a non-discriminatory basis. Furthermore, the NTRA would be enabled to communicate better with the ECA, therefore positively impacting the control of anti-competitive practices that could harm the telecom industry in Egypt as well as attracting further investments via the expertise exchanged between both authorities.

Moreover, cooperation between the ECA and NTRA will take place through the exchange of technical support provisions as well as the standardisation of methods of economic and legal analysis conducted in the telecom sector, especially those related to the definition of the relevant market and different means of control of practices that might harm free competition. In addition, the ECA aims to restrict any decrees or policies that may harm competition in the telecom sector to ensure competitive impartiality.

Law stated - 9 April 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Background

In the European Union, the progressive yet quick liberalisation of electronic communications services paved the way for the creation of a single electronic communications market. The liberalisation process, which began in the 1980s, finally led to a full opening of the electronic communications sector on 1 January 1998. Since then, the never-ending evolution of the electronic communications market, reshaped notably by the convergence of the electronic communications, broadcasting and IT sectors, has required several reforms of the EU electronic communications framework. The new EU electronic communications frameworks generally come in packages of directives. The first Telecom Package was adopted in 2002. It was later amended in 2009 and 2015.

Electronic communications regulatory framework

The current EU electronic communications framework includes the following texts:

- Directive 2002/58/EC (Directive on Privacy and Electronic Communications), as amended by Directive 2009/136/EC (Citizens' Rights Directive), which, inter alia, deals with the processing of personal data in the context of the provision of electronic commu nications services and contains provisions in relation to the security of networks and services and notification of breaches of security;
- Decision No. 676/2002/EC (Radio Spectrum Decision), which establishes the European policy for radio spectrum with the aim of ensuring coordination between EU member states and harmonisa tion conditions for the efficient use of radio spectrum;
- Regulation (EU) 2015/2120, laying down measures concerning open internet access and amending Directive 2002/22/EC on universal service and users' rights relating to electronic commu nications networks and services and Regulation (EU) 531/2012 on roaming on public mobile communications networks within the European Union, amended by Regulation (EU) 2017/920;
- Directive 2014/61/EU on measures to reduce the cost of deploying high-speed electronic communications networks;
- Regulation (EU) 2017/1953, amending Regulations (EU) 1316/2013 and Regulation (EU) 283/2014, regarding the promo tion of internet connectivity in local communities (Wifi4EU);
- Regulation (EU) 2018/1807 on a framework for the free flow of non-personal data in the European Union;
-

Regulation (EU) 2018/1971 establishing the Body of European Regulators for Electronic Communications (BEREC) and the Agency for Support for BEREC (BEREC Office), amending Regulation (EU) 2015/2120 and repealing Regulation (EC) 1211/2009;

- Directive (EU) 2018/1972 establishing the European Electronic Communications Code (the EECC Directive); and Implementing Regulation (EU) 2019/2243, establishing a template for the contract summary to be used by providers of publicly avail able electronic communications services pursuant to Directive (EU) 2018/1972;
- Regulation (EU) 2022/612 of the European Parliament and of the Council of 6 April 2022 on roaming on public mobile communications networks within the Union (recast);
- Regulation (EU) 2022/2065 on a Single Market For Digital Services and amending Directive 2000/31/EC (Digital Services Act);
- Regulation (EU) 2022/1925 on contestable and fair markets in the digital sector and amending Directives (EU) 2019/1937 and (EU) 2020/1828 (Digital Markets Act) (DMA);
- Regulation (EU) 2022/868 on European data governance and amending Regulation (EU) 2018/1724 (Data Governance Act);
- Directive (EU) 2022/2555 on measures for a high common level of cybersecurity across the Union, amending Regulation (EU) 910/2014 and Directive (EU) 2018/1972, and repealing Directive (EU) 2016/1148 (NIS2 Directive);
- Regulation (EU) 2022/2554 on digital operational resilience for the financial sector and amending Regulations (EC) 1060/2009, (EU) 648/2012, (EU) 600/2014, (EU) 909/2014 and (EU) 2016/1011 (DORA);
- Directive (EU) 2022/2556 amending Directives 2009/65/EC, 2009/138/EC, 2011/61/EU, 2013/36/EU, 2014/59/EU, 2014/65/EU, (EU) 2015/2366 and (EU) 2016/2341 as regards digital operational resilience for the financial sector (DORA);
- Directive (EU) 2022/2557 on the resilience of critical entities and repealing Council Directive 2008/114/EC (Critical Entities Resilience Directive); and
- Regulation (EU) 2024/1309 on measures to reduce the cost of deploying gigabit electronic communications networks, amending Regulation (EU) 2015/2120 and repealing Directive 2014/61/EU (Gigabit Infrastructure Act).

The EECC Directive introduced several changes, inter alia, new measures to:

- increase competition and predictability for investments;
- reduce regulation for co-investment of rival operators in very high-capacity networks;
- improve coordination and use of spectrum across the European Union;
- strengthen consumer protection; and
- create a safer online environment.

The EECC Directive had to be transposed into national law by 21 December 2020, except for article 53 'on coordinated timing of assign ments for access to radio spectrum', which applies as of 20 December 2018 (articles 124 and 126 of the EECC Directive). The Directive repealed, from 21 December 2020, the four main directives of the pre-existent Telecom Package, namely:

- Directive 2002/21/EC (Framework Directive), as amended by Directive 2009/140 (the Better Regulation Directive);
- Directive 2002/20/EC (Authorisation Directive), as amended by the Better Regulation Directive;
- Directive 2002/19/EC (Access Directive), as amended by the Better Regulation Directive; and
- Directive 2002/22/EC (Universal Service), as amended by the Citizens' Rights Directive.

Overhaul of the electronic communications regulatory framework

Considering the rapid digitalisation of the world market and the opportunities it entails, the European Commission (the Commission) identified the completion of the Digital Single Market as one of the Commission's 10 political priorities.

The Digital Single Market is defined by the Commission as a market in which:

> the free movement of goods, persons, services and capital is ensured and where individuals and businesses can seamlessly access and exercise online activities under conditions of fair competition, and a high level of consumer and personal data protection, irrespective of their nationality or place of residence.

The goal of the Commission is to help generate €415 billion per year and create 3.8 million jobs by knocking down regulatory barriers in the digital space and transforming 28 separate digital markets across the European Union into a single one.

The Digital Single Market Strategy, which was launched in May 2015, was built on three pillars:

- better access for consumers and businesses to digital goods and services across the European Union;
- creating the right conditions and a level playing field for digital networks and innovative services to flourish; and
- maximising the growth potential of the digital economy.

The EECC Directive is part of the wider connectivity package proposed by the Commission in September 2016. It aims at enabling the full participation of EU citizens and businesses in the digital economy. This initiative plans to achieve the following milestones by 2025:

- gigabit connectivity for major economic drivers such as schools, medium-sized and large enterprises and main providers of public services;

- upgradeable connectivity of at least 100 megabits per second for all European households; and
- 5G coverage for all urban areas and all major terrestrial trans port paths.

To take into account the recent developments in the communications sector such as the increased use by end users of services based on Voice over Internet Protocol (VoIP), messaging services or web-based email services in place of traditional voice and short message services, the EECC Directive sets out a new definition of the term 'electronic commu nications service'. Three types of service categories are introduced:

- internet access services;
- interpersonal communications service (allows direct communica tions over an electronic communications network between finite numbers of people either based, or not, on a number); and
- services consisting wholly or mainly of the conveyance of signals (eg, for machine-to-machine communications or for broadcasting).

Most provisions apply indifferently to all electronic communication services except number-independent interpersonal communications services.

Institutions

The Commission is the main institution responsible for the enforcement of the electronic communications policy and regulation. Two Directorates-General are mainly involved in the electronic communica tions policy:

- the Directorate-General for Communications Network, Content and Technology headed by Thierry Breton; and
- the Directorate-General for Competition headed by Olivier Guersent.

BEREC also plays a key role in the development and better functioning of the internal market for electronic communications. On 7 March 2020, BEREC published guidelines for intra-EU communications. These guidelines clarified the provisions for regulating intra-EU communications services to ensure a common regulatory approach and assist EU member states in their consistent implementation. These Guidelines are complementary to the provisions set out in the Regulation and are not presented as an official legal interpretation of those provisions.

BEREC has so far issued several guidelines on the following topics:

- intra-EU communications (update);
- minimum criteria for a reference offer;
- general authorisation notifications;
- network termination point;
- geographical surveys of network deployments;
- numbering resources for non-ECN/non-ECS;
- quality of service;

- public warning systems;
- very high-capacity networks;
- symmetric access obligations;
- co-investment criteria;
- roaming;
- open internet; and
- net neutrality.

The Independent Regulators Group as well as each EU member state's national regulating authority (NRA) are also influential actors. Finally, decisions of national courts and tribunals and the Court of Justice of the European Union (CJEU) also significantly contribute to the interpretation of the electronic communications framework.

The EECC Directive enhanced the role of BEREC and reinforced the role of NRAs, both at the national and EU level, to increase consistency and predictability of the application of the rules in the context of the Digital Single Market.

Foreign ownership

The EU electronic communications framework does not contain provisions imposing foreign ownership restrictions for the provision of electronic communications services.

Law stated - 5 May 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

Under EU law, the freedom to provide services is guaranteed under article 56 of the Treaty on the Functioning of the European Union, according to which:

> restrictions on freedom to provide services within the Union shall be prohibited in respect of nationals of member states who are established in an EU member state other than that of the person for whom the services are intended.

This principle is reflected in article 12(1) of the EECC Directive, according to which EU member states shall:

> ensure the freedom to provide electronic communications networks and services, subject to the conditions set out in the Directive.

For this purpose, the EECC Directive is based on a 'general authorisation' regime. Under this authorisation regime, the provision of electronic communications networks or services can only be subject to a 'general authorisation' (namely, the operator may be required

to submit a prior notification of its activity to the NRA but cannot be required to obtain an explicit decision or any other administrative act). As an exception to the 'general authorisation' regime, EU member states can grant, upon request, individual licences for the use of scarce resources like frequen cies, numbers and rights of way.

The list of information required as part of the notification procedure to the NRAs has been harmonised by the EECC Directive to avoid excessive administrative costs for operators.

In December 2019, under article 12 of the EECC Directive, to approximate notification requirements and to harmonise accordingly the notification forms currently in use at the national level, BEREC published guidelines for the notification template. These guidelines define a template of the notification form to be filled up at the beginning of the activities by electronic communications network (ECN) or electronic communications service (ECS) providers. A set of minimum operator's rights are attached to the 'general authorisation'. Thanks to the 'general authori sation', an operator notably has the rights to:

- operate electronic communications networks and provide elec tronic communications services;
- apply for rights of way;
- negotiate interconnection with, and where applicable obtain access to or interconnection from, other operators;
- be allowed to be designated to provide different elements of a universal service; and
- have access to scarce resources (radio spectrum and numbering resources) (article 15 of the EECC Directive).

On 5 December 2024, BEREC released an Opinion on the national implementation and functioning of the general authorisation. The main purpose of this Opinion is to provide ideas for the Commission to consider for future reflections on the general authorisation regime, in the light of the challenges reported by the stakeholders and of BEREC's own experience. In this Opinion, BEREC came to the conclusion that the general authorisation regime has been properly working so far in regulating market entry, without creating barriers for operators in entering national markets. According to BEREC, some issues however emerged from public consultation, particularly regarding ECN providers established outside a given member state or providing ECNS in more than one member state due to differing national legal requirements. It also suggests considering the future inclusion of other digital service providers, such as number-independent interpersonal communications services (NI-ICS), within the general authorisation regime framework. Lastly, BEREC raises the issue of the possible introduction of a 'country of origin' approach to authorising market entry for specific categories of services, warning of risks to regulatory consistency and a level playing field across the internal market.

The EECC Directive also provides for an exhaustive list of conditions that an EU member state may attach to the general authori sation such as:

- fees for the rights of use;
- administrative charges;
- interoperability and interconnection;
- accessibility by end users of numbers from the national numbering plan; or

- ‘must carry’ obligations (article 13 of the EECC Directive).

EU law does not provide for a limit on the duration of the ‘general authorisation’. However, when individual rights to the use of scarce resources are granted for a limited period, the duration shall be appropriate for the service concerned.

The EU member states can allow the relevant NRA to impose fees for the rights of use for radio spectrum and numbers, as well as rights to install facilities. These fees have to be objectively justified, transparent, non-discriminatory and proportionate concerning their intended purpose and take into account the objectives set out in the EECC Directive (article 95 of the EECC Directive).

The EU Regulatory framework for electronic communications is technologically neutral (in particular, Recital 14 of the EECC Directive) and as such applies to all electronic communications networks and services. There is no difference in the regime applicable to fixed, mobile or satellite networks and services.

Law stated - 5 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

Permitted use restriction

Member states shall facilitate the use of radio frequencies, under ‘general authorisations’. However, EU member states shall grant individual rights of use to avoid harmful interference, ensure technical quality of service, safeguard efficient use of spectrum or fulfil other objectives of general interest as defined by EU member states under EU law. This set of principles is not only for the use of radio frequencies but also for radio spectrum (article 46 of the EECC Directive).

When it is necessary to grant such individual rights, EU member states must comply with several provisions in particular concerning the efficient use of resources under the EECC Directive.

Also, the now-repealed Authorisation Directive established that only certain conditions may be attached to rights of use for radio frequencies. As a consequence, the permitted use may only be restricted under spec trum licences by the following conditions attached to the rights of use:

- the designation of service or type of network or technology for which the rights of use for the frequency have been granted including, where applicable, the exclusive use of a frequency for the transmission of specific content or specific audiovisual services;
- effective and efficient use of frequencies;
- technical and operational conditions necessary for the avoidance of harmful interference and for the limitation of exposure of the general public to electronic

fields, where such conditions are different from those included in the general authorisation;

- maximum duration subject to any changes in the national frequency plan;
- transfer of rights at the initiative of the right holder and conditions for such transfer;
- usage fees;
- any commitments that the operator obtaining the usage right has made in the course of a competitive or comparative selection procedure; and
- obligations under relevant international agreements relating to the use of frequencies and obligations specific to an experimental use of radio frequencies.

Under the EECC Directive, these conditions have remained identical ((D) of Annex 1 of the EECC Directive), with additional obligations to pool or share radio spectrum or allow access to radio spectrum for other users in specific regions or at the national level.

Principles must be taken into account by EU member states where they intend to limit the number of rights of use to be granted for radio frequencies (article 45 of the EECC Directive).

Also, the EECC Directive introduced further harmonisation measures for spectrum including promoting shared use of spectrum and coordinating spectrum assignments. The consistency of the spectrum assignment process will be safeguarded through a process involving BEREC scrutiny of NRA's planned spectrum measures (articles 4.3 and 35 of the EECC Directive).

Tradability of spectrum licences

Under the EECC Directive, EU member states shall ensure that undertakings may transfer or lease to other undertakings individual rights of use for radio spectrum.

EU member states shall:

- submit transfers and leases to the least onerous proce dure possible;
- not refuse the lease of rights of use for radio spectrum where the lessor undertakes to remain liable for meeting the original condi tions attached to the rights of use; and
- not refuse the transfer of rights of use for radio spectrum unless there is a clear risk that the new holder is unable to meet the original conditions for the right of use (article 51 of the EECC Directive).

When an operator wishes to transfer rights to use frequencies, it shall notify the NRA responsible for granting individual rights of use. Such notification must also be made once the effective transfer has occurred. Notifications shall be made public

Law stated - 5 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

In February 2003, the Commission published a recommendation detailing a list of 18 markets susceptible to being subject to ex-ante regulation. Such recommendation was updated in December 2007, reducing the list to seven markets and then in 2014 to four markets, none of which were retail markets.

The recommendation was updated again on 18 December 2020, reducing the list to two markets, namely, the market for wholesale local access and the market for wholesale access to dedicated connec tivity, both defined on the basis of competition law principles and with regard to the overall technological, regulatory and market trends in the European Union.

The EECC Directive introduced the implementation of ex-ante market regulations into the missions of the NRAs and provides that NRAs shall 'impose ex-ante regulatory obligations only to the extent necessary to secure effective and sustainable competition in the interest of end-users and relax or lift such obligations as soon as that condition is fulfilled', these obligations include the imposition of access and inter connection obligations (article 67 of the EECC Directive).

Also, the EECC Directive codified the 'three criteria test' contained in the Commission's Recommendation on Relevant Markets (2002) and used to determine whether a specific market should be regulated (eg, high barriers to entry, no dynamic tendency towards effective compe tition and insufficiency of competition law). The EECC Directive also extended the current maximum market review period from three to five years. However, NRAs may still conduct such analysis within shorter intervals if market developments require it. New provisions are introduced for revision of remedies imposed by NRAs, for instance when market conditions have changed because of new commercial agreements or the breach of existing ones or new co-investment agreements. A double-lock system is introduced whereby in cases where BEREC and the Commission agree that a draft remedy would create a barrier to the single market, the relevant NRA may be required to amend or withdraw the contemplated measure.

In the context of the elaboration of the DMA intro ducing a series of rules for platforms acting as 'gatekeepers' in the digital sector, BEREC published on 30 September 2021, a report in which it proposed a regulatory model for an ex-ante regulation of these platforms (for further information, see the DMA, which entered into force on 1 November 2022).

Law stated - 5 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

The remedy of functional separation was introduced in the Access Directive in 2009 by the repealed Better Regulation as an exceptional measure and was reproduced identically in

the EECC Directive. It may only be imposed on vertically integrated operators when the relevant NRA concludes that the other ex-ante regulatory obligations have failed to achieve effective competition and that there are important and persistent competition problems or market failures identified concerning the wholesale provision of certain access product markets. Such measure consists of imposing on the concerned operator a duty or obligation to place activities related to the wholesale provision of relevant access products in an independently operated business. On this basis, the operator shall supply access products and services to its other business entities and other operators under the same terms and conditions, including price and service levels.

Also, the EECC Directive implemented the possibility of imposing functional separation on a significant market power (SMP) operator if the remedies imposed following a market-review process have not succeeded in achieving competition.

The now-repealed Access Directive also introduced a voluntary separation mechanism under which a vertically integrated operator that has been identified as having SMP in one or several markets informs the competent NRA in advance and in a timely manner of its intent to transfer their local access network assets or a substantial part thereof to a separate legal entity under different ownership or to establish a separate business entity to provide to all retail providers, including its own retail divisions, fully equivalent access products. Upon such infor mation, the NRA shall assess the effect of the intended transaction on existing regulatory obligations and, in accordance, shall impose, main tain, amend or withdraw obligations. This has been reaffirmed in article 78 of the EECC Directive.

BEREC has published guidelines that an NRA may rely upon when considering the appropriateness and the manner to implement functional separation (Guidance on Functional Separation under articles 13a and 13b of the revised Access Directive and national experiences).

Law stated - 5 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

Scope of universal service

Under Recital 210 of the EECC Directive, universal service is defined as a:

> safety net to ensure that a set of at least the minimum services is available to all end-users and at an affordable price to consumers, where a risk of social exclusion arising from the lack of such access prevents citizens from full social and economic participation in society.

This concept is based on the now-repealed Universal Service Directive but evolved to reflect advances in technology, market developments and changes in user demand. The national NRA is in charge of ensuring all citizens have access to a universal service.

Operators must provide a certain number of mandatory services, including:

- provision of access at a fixed location and provision of tele phone services;
- provision of directories and directories enquiry services;
- provision of public payphones; and
- measures for disabled users.

The EECC Directive sets new mandatory services to which consumers should have access at an affordable price. EU member states may adopt different tariff options to ensure that the services are also affordable to consumers with low-income or special social needs such as older people, end users with disabilities and consumers living in rural or geographically isolated areas. The new services include the provision of available adequate broadband internet access service and provision of voice communications services at least at a fixed location, indicating that EU member states can now extend universal service to mobile services. 'Adequate broadband' means the broadband 'necessary for social and economic participation in society' (namely, minimum needed to support services, eg, email, internet banking, standard quality video calls and social media (as set out in Annex V)).

EU member states may consider that the need for the previous services set by the now-repealed Universal Service Directive is established in light of national circumstances and shall be provided along with the new services as from 21 December 2021.

EU member states can designate one or more 'providers of services' according to the EECC Directive in charge of guaranteeing the provision of these services for the whole of the territory to be covered. Different providers of services may provide different elements of universal services. The universal service must be affordable; NRAs shall monitor the evolution and level of retail tariffs of these services. EU member states may require designated providers of services to provide customers with tariff options that depart from those provided under normal commercial conditions.

Funding of universal service

The methods for designating operators or providers of services in charge of the provision of universal service must ensure that such service is provided cost-effectively. NRAs that consider that the provision of universal service may represent an unfair burden on the designated providers of services are given the possibility to calculate the net costs of its provision. If it is found that such an operator is subject to an unfair burden, EU member states can, upon request, put in place a mecha nism to compensate that provider of services or to share the net cost of universal service obligations between providers of electronic communi cations networks and services. According to the EECC Directive, the net costs of this universal service are to be paid for either through general taxpayer funds or else through a specific levy on electronic communications networks and service providers.

The European Court of Justice clarified that, in determining whether the net cost of universal service obligations constitutes an unfair burden, the NRA cannot limit its assessment to the economic situation of the concerned operator alone, but must also compare it to that of its competitors. This includes analysing potential distortions of competition in the relevant market (CJEU, 10 November 2022, Case C-494/21). The Court also recognised that the degree of substitutability between fixed and mobile telephony

services may be a relevant factor and upheld national regulations excluding certain operators from the cost-sharing mechanism, provided such regulations respect principles such as transparency, non-discrimination and proportionality (CJEU, 19 September 2024, Case C-273/23).

In its Work Programme 2025, BEREC recalled that in view of the review of the scope of the universal services, pursuant to article 122 of the EECC Directive, the Commission must carry out by 21 December 2025, and every five years thereafter, this review in light of social, economic and technological developments. BEREC intends to assist the Commission in the review process by providing all necessary information, collect relevant data from the member states and provide an opinion on relevant aspects of the report. BEREC announced it will review three strategic documents as to set out its objectives for the period 2026–2030 in view of the latest and expected relevant market, technological and regulatory developments during the next five years.

Law stated - 5 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

Under article 94 of the EECC Directive, a number allocation scheme is handled by EU member states through their NRAs, which control the granting of rights of use of all national numbering resources and manage the national numbering plans. NRAs are also under the obligation to establish objective, transparent and non-discriminatory assigning procedures for the grant of such resources. An equal treatment principle must be applied between all providers of publicly available electronic communications services. The national numbering plan and its subsequent amendments must be published subject only to national security limitations.

EU member states have a role to support the harmonisation of specific numbers and number ranges within the European Union where this promotes both the functioning of the internal market and the development of pan-European services. Implementing measures may be taken by the Commission on the subject.

Where the assignment of numbers with exceptional economic value is concerned, EU member states may use, inter alia, competitive or comparative selection procedures for the assignment of radio frequencies.

The right to use numbers may be subject only to the conditions listed in Annex I of the EECC Directive. These conditions include, inter alia, desig nation of service for which the number shall be used, including:

- any requirements linked to the provision of that service;
- effective and efficient use of numbers in conformity with the EECC Directive;
- number portability requirements in conformity with the EECC Directive; and
- an obligation to provide public directory subscriber information for transfer of rights in conformity with the EECC Directive.

According to the EECC Directive, NRAs may also grant rights of use for numbering resources from the national numbering plans for the provision of specific services to undertakings other than providers of electronic communications networks or services, provided that adequate numbering resources are made available to satisfy current and foreseeable future demand.

On 6 March 2020, BEREC published guidelines on common criteria for assessing non-ECN or ECS undertakings, and the assessment of the ability to manage numbering resources by undertakings other than ECN or ECS. These guidelines also set out rules to avoid the risk of exhaustion of numbering resources if numbering resources are assigned to such an undertaking. Also, the EECC Directive provides that each EU member state shall make available a range of non-geographic numbers that may be used for the provision of electronic communica tions services other than interpersonal communications services and shall promote over-the-air provisioning, where technically feasible, to facilitate switching of providers of electronic communications networks or services by end users, in particular, providers and end users of machine-to-machine services.

Number portability is a requirement under the EECC Directive. It applies equally to fixed and mobile networks and geographic and non-geographic numbers. However, the requirement does not apply to the porting between numbers from a fixed network to a mobile network and vice versa. All subscribers of publicly available telephone services are entitled to keep their number upon request, independently of their service provider.

Operators are required to port and activate a number within the shortest possible time and within a maximum delay of one working day. NRAs ensure that the prices charged between operators concerning the provision of portability are cost-orientated.

Appropriate sanctions must be provided for by EU member states including an obligation to compensate subscribers in the case of delay in the porting or abuse of porting by them.

Law stated - 5 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Most of the specific rules underlined hereinunder have been implemented by the now-repealed Universal Service Directive and have been reproduced identically in the EECC Directive.

Consumers must be offered contracts of 12 months and opera tors cannot offer contracts exceeding 24 months. The conditions and procedures for contract termination should not constitute a disincentive against changing service providers.

Consumers and other end users have a right to a contract with their operator. This contract must comprise several mandatory provi sions that include, inter alia, the identity and the address of the operator, the services provided, the details of prices and tariffs, the means to obtain up-to-date information on all applicable tariffs and maintenance charges, payment methods, duration of the contract and the conditions for renewal and termination services

and of the contract, any compen sation and the refund arrangements applicable if service quality levels are not met.

EU member states have the possibility to require that the contract include any information that may be provided by the relevant public authorities on the use of electronic communications networks and services to engage in unlawful activities or to disseminate harmful content, and on the means of protection against risks to personal secu rity, privacy and personal data.

Subscribers also have a right to withdraw from their contract without penalty upon notice of modification to the contractual conditions proposed by their provider. Subscribers shall receive a notification not shorter than one month of such modification, along with information on the right to withdraw, without penalty in the case of refusal of these new terms.

Finally, NRAs must ensure that operators publish transparent, comparable, adequate and up-to-date information on applicable prices and tariffs, on charges due upon termination and standard terms and conditions in respect of access to, and use of, services provided by them to end users and consumers.

The EECC Directive includes the Universal Service Directive requirements, harmonises end-user rights and establishes additional contract requirements. The EECC Directive introduces a detailed list of informa tion requirements to be included in end-user contracts, which include, inter alia, information about the technical characteristics of the service, the price, the duration of the contracts and conditions for switching, procedures for dispute settlements or actions to be taken in security and integrity incidents. These requirements also apply to contracts with micro and small enterprises acting as end users. New provisions aimed at facilitating the switch from one service provider to another have been introduced, for instance, provisions dealing with the issue of bundles as an obstacle to switching.

On 17 December 2019, the Commission adopted the Implementing Regulation (EU) 2019/2243, establishing a template for the contract summary to be used by providers of publicly available electronic communications services.

This Implementing Regulation also sets out:

- the length of the contract;
- the presentation of the information (headings, font size and pagi nation); and
- the language requirements.

This Implementing Regulation entered into force on 21 December 2020.

Beyond the EECC Directive, accessibility legislation at the EU level also impacts the way these contractual and service-related obligations are implemented for end-user consumers with disabilities. Directive (EU) 2016/2102 (the Web Accessibility Directive), imposes requirements on the accessibility of websites and mobile applications of public sector bodies. More recently, Directive (EU) 2019/882 (the European Accessibility Act (EEA)), which becomes applicable as of 28 June 2025, introduces horizontal accessibility requirements for key products and services across the internal market. Among those covered are electronic communications services provided to consumers, with the exception of transmission services used solely for machine-to-machine communications. The EEA

aims to harmonise accessibility standards across member states alongside the EECC Directive provisions, by ensuring that consumer-facing elements such as contracts and user interfaces are accessible for all.

Law stated - 5 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

The principle of net neutrality was formally taken into account on the occasion of the 2009 reform of the Telecom Package. The now-repealed Better Regulation Directive included references to the principle of net neutrality.

After intense discussions and debate, the European Parliament and the European Council adopted Regulation (EU) 2015/2120 concerning open internet access, which enshrines the principle of net neutrality into EU law. BEREC published guidelines on the implementation by NRAs on these European net-neutrality rules in August 2016. At the end of 2019, BEREC announced that it had worked on an update to the BEREC Net Neutrality Guidelines, which have been renamed the BEREC Guidelines on the Implementation of the Open Internet Regulation. On 10 October 2019, BEREC launched a public consultation on these Guidelines that ran until 28 November 2019. The received feedback did not justify any major changes to the Guidelines. However, it was clear that some further clarifications were needed and now these are included in the Guidelines, which were published on 17 June 2020. These Guidelines are designed to guide the implementation of the obligations of NRAs. Specifically, this includes the obligation to closely monitor and ensure compliance with the rules to safeguard equal and non-discriminatory treatment of traffic in the provision of internet access services and related end-user rights.

In its Work Programme for 2022, BEREC announced that it would work on an update of its Net Neutrality Regulatory Assessment Methodology designed, among other things, to further develop the methodology regarding the measurement of the general quality of internet access services. This Net Neutrality Regulatory Assessment Methodology was published on 15 June 2022. It is intended to provide guidance to NRAs in relation to the monitoring and supervision of the net neutrality provisions of Regulation (EU) 2015/2120 (Open Internet Regulation), and the possible implementation of net neutrality measurement tools on an optional basis. In the 2023 work stream, BEREC monitored the implementation of the Open Internet provisions among NRAs for the period 1 May 2022 to 30 April 2023.

The Open Internet Regulation concerning open internet access guarantees the rights of end users to access and use the internet. Providers of internet access services are under the obligation to treat all traffic equally without discrimination, restriction or interference and irrespec tive of the sender and receiver, the content accessed or distributed, the applications or services used or provided, or the terminal equipment used. This prohibits, in particular, the practice of bandwidth throttling.

However, this principle does not prevent providers of internet access services from implementing traffic management measures as long as they are transparent,

non-discriminatory, proportionate and not based on commercial considerations. Three additional exceptions are provided for:

- compliance with other laws;
- preservation of integrity; and
- security and congestion management measures.

Providers of electronic communications to the public are free to offer services other than internet access services that are optimised for specific content, applications or services or a combination thereof, which BEREC refers to as 'specialised services'. However, this is possible only where some conditions are met:

- the optimisation must be necessary to meet the requirements of the content, applications or services for a specific level of quality;
- the network capacity must be sufficient to provide these services in addition to any internet access services provided;
- the specialised services must not be usable or offered as a replacement for internet access services; and
- the specialised services must not be to the detriment of the availability of the general quality of the internet access services for end users.

As NRAs are in charge of ensuring compliance with these provisions, they will contribute to the determination of the necessity and capacity tests. The recitals of the Open Access Regulation give examples of specialised services 'services responding to a public interest or by some new machine-to-machine communications services'. BEREC also identifies services such as Voice over Long-Term Evolution and linear broadcasting Internet Protocol television services with specific quality of service requirements.

The practice of zero-rating, whereby traffic from certain sources does not count towards any data cap in place for the subscriber, is not prohibited under the rules governing net neutrality. However, BEREC considers that different forms of zero-rating may have different consequences and that the acceptability of each practice should be assessed on a case-by-case basis. For instance, a zero-rating offer where all applications are blocked (or slowed down) once the data cap is reached except for the zero-rated applications would infringe net-neutrality rules. BEREC has revised and updated its Open Internet Guidelines in light of recent rulings of the CJEU. The new guidelines published on 9 June 2022 reflect the CJEU's ruling that zero-tariff offers are incompatible with the obligation of equal treatment of traffic in the Open Internet Regulation.

Law stated - 5 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

As part of the Digital Single Market Strategy, a comprehensive assessment of the role of online platforms has been conducted. It is also one of the three emerging challenges identified in the Digital Single Market Strategy mid-term review.

In its mid-term review on the implementation of the Digital Single Market Strategy, the Commission identified actions to be implemented concerning online platforms. Thus, the Commission launched an action plan against disinformation and, on 26 September 2018, a self-regulatory code of practice was published to measurably reduce online disinformation on online platforms, leading social networks and in the advertising industry. On 5 December 2018, the Commission reported on the progress made and published an action plan that foresees an increase of resources allocated to counter-disinformation efforts.

On 1 March 2018, the Commission also adopted a recommendation including a set of (non-binding) operational measures to be taken by companies and member states to tackle illegal content online. Also, Regulation (EU) 2019/1150 on promoting fairness and transparency for business users of online intermediation services was adopted on 20 June 2019. This Regulation aims at establishing a legal framework that guarantees transparent terms and conditions for business users of online platforms (that is, that the terms and conditions of platform services are plain and easily available for business users, as well as that any modification to the terms and conditions is notified with propor tionate and reasonable advance to their business users), as well as effective possibilities for redress when these terms and conditions are not respected by online platforms (namely, online market places, online software application stores, online social media and online search engines). Online service providers will need to change their terms and conditions to include these new requirements. The Regulation entered into force with direct effect in EU member states on 12 July 2020.

On 25 March 2022, an agreement was reached by the European Council and the European Parliament on the Regulation on contestable and fair markets in the digital sector (the DMA), which will introduce further rules for large platforms service providers (including social media, search engines and operating systems) designated as gatekeepers. Under the DMA, gatekeepers will be subject to a number of requirements and restrictions, including data access, interoperability and self-preferencing. Non-compliance might lead to fines of up to 10 per cent of the gatekeeper's worldwide turnover, or up to 20 per cent in the event of repeated infringements to ensure the effectiveness of the new rules. The DMA entered into force on 1 November 2022 and became applicable on 2 May 2023. Within two months of that date, companies providing core platform services had to notify the Commission if they met the quantitative thresholds and provide all relevant information. The Commission then had 45 working days to adopt a decision designating a specific gatekeeper. The designated gatekeepers then had a maximum of six months after the Commission decision to ensure compliance with the obligations and prohibitions laid down in the DMA. Since 7 March 2024, all gatekeepers must comply with the DMA.

On 19 October 2022, the Single Market For Digital Services (the Digital Services Act) (DSA) was adopted. The DSA regulates the obligations of online intermediary services providers to counter illegal content, while promoting traceability and effective safeguards for users. The DSA is directly appli cable across the European Union. As of 17 February 2024, the DSA rules apply to all platforms. Since the end of August 2023, these rules had already applied to designated platforms with more than 45 million users in the European Union (10

per cent of the European Union's population), the 'very large online platforms' or 'very large online search engines'.

In February 2025, a Code of Practice on disinformation was incorporated into the DSA. Initially established in 2018 and subsequently reinforced in 2022, this Code has been signed by approximately 40 entities, including major online platforms alongside stakeholders from the advertising industry, media outlets, research bodies, and civil society organisations. Effective as of 1 July 2025, the Code will constitute the primary reference instrument for determining whether signatories are in compliance with the DSA's provisions concerning.

Law stated - 5 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

The European Regulatory Framework for electronic communications and the EECC Directive are technologically neutral so apply to NGA networks in the same manner that they apply to other networks. However, the 2010 Commission Recommendation of 20 September 2010 on regulated access to the NGA sets out a common approach for promoting the consistent implementation of remedies concerning NGAs and provides for regulatory principles that NRAs should follow. NGAs are also dealt with in the 2013 Commission Recommendation on consistent non-discrimination obligations and costing methodologies to promote competition and enhance the broadband investment environment.

Directive 2014/61/EU on measures to reduce the cost of deploying high-speed electronic communications networks also aims at facilitating and incentivising the roll-out of high-speed electronic communications networks by reducing its cost. It includes measures such as the sharing and reuse of existing physical infrastructure, which are expected to create conditions for more cost-efficient network deployment.

The EECC Directive introduced a new mission for NRAs, which is to promote access to, and take-up of, very high-capacity connectivity for both fixed and mobile networks. The new EECC Directive sets out provisions concerning co-investment and NGAs, in particular, 'very high-capacity networks'. The EECC Directive establishes an exception on access market and price regulation for operators with 'significant market power' undertaking to build or to co-invest in the infrastructure necessary for the creation of high connectivity networks.

On 6 March 2020, BEREC published guidelines on very high-capacity networks. The Guidelines set out the criteria that a network must fulfil to be considered a very high-capacity network, particularly in terms of down and uplink bandwidth, resilience, error-related parameters, latency and variation. The Guidelines shall contribute to the harmonisation of the definition of the term 'very high capacity network' in the European Union.

On 23 February 2023, the Commission published a package to make deployment and utilisation of digital infrastructure, including electronic communications networks, more efficient. The package includes a proposed to the European Parliament and the Council of the European Union a draft regulation on measures to reduce the cost of deploying the gigabit electronic communications network, the Gigabit Infrastructure Act, which will replace and repeal Directive 2014/61/EU.

The new rules, which are aligned with those of the EECC Directive that entered into force in 2020, will, once adopted, be directly applicable in all EU member states. The Commission has submitted a draft Recommendation on the regulatory promotion of gigabit connectivity to BEREC for opinion on 23 February 2023. This Recommendation will replace the 2010 Recommendation on regulated access to the NGA and the 2013 Recommendation on consistent non-discrimination obligations and costing methodolo gies. The Commission also launched a consultation on the potential developments of the connectivity sector of and its infrastructure. The aim is to review the connectivity sector through consultation and gather views on the changing technological and market landscape and how it may affect the sector for electronic communications.

The Gigabit Infrastructure Act was finally adopted on 29 April 2024. It establishes a harmonised legal framework designed to facilitate and accelerate the deployment of very high-capacity electronic communications networks (such as fibre-optic and 5G infrastructure) across the European Union. The regulation will apply from 12 November 2025. This legislative initiative forms part of the European Union's broader strategy to achieve the objectives of the Digital Decade 2030, notably the goal of ensuring universal access to gigabit connectivity and high-speed mobile data services throughout the EU by 2030.

Law stated - 5 May 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

Data protection and privacy in the European Union is currently governed by Regulation (EU) 2016/679 (General Data Protection Regulation) (GDPR) and Directive 2002/58/EC (ePrivacy Directive), as amended by the Citizens' Rights Directive.

Since 25 May 2018, the GDPR directly applies in all EU member states, without having to be transposed into national law. The GDPR fully regulates the processing of personal data in the European Union. By setting uniformly high standards of data protection, it ensures the free flow of personal data in the European Union. It has, in particular, a significantly broader territorial scope than the previous EU Data Protection Directive. It places, among others, greater emphasis on the documentation obligations of data controllers to demonstrate their accountability and significantly strengthens data subjects' rights to give them more control over their personal data. The GDPR also introduced significant fines for any data breaches in the amount of up to 4 per cent of a company's global revenue or €20 million, depending on whichever is higher. These pose a significant financial risk to data controller organisations, such as telecommunication service providers. Many telecommunication service providers use third-party service providers that process and store data on their behalf and thus, must

comply with the provisions outlined in GDPR to avoid any sanctions by the competent authority.

The ePrivacy Directive ensures the protection of fundamental rights and freedoms, in particular the respect for private life, the confidentiality of communications and the protection of personal data in the electronic communications sector. It obliges EU member states to ensure the privacy of communications and related traffic data. Under the ePrivacy Directive, any interception or surveillance of communications (including listening, storage or tapping) is prohibited, unless explicitly permitted under national law. To be permissible, such inter ception would have to be necessary, appropriate and proportionate for specific 'public order' purposes; namely, to safeguard national security, defence or public security or for the purposes of law enforcement and would have to comply with the general principles of EU law and the European Convention on Human Rights.

As a part of the Digital Single Market Strategy, the ePrivacy Directive is currently under evaluation. In 2015, the Commission considered it necessary to verify whether its rules have achieved their main objectives (ensuring adequate protection of privacy and confidentiality of communications in the European Union) and whether they are still fit for purpose in the regulatory and technological context.

It shall now be adapted to the new EU data protection framework as well as recent technological and economic developments in the EU market since the last revision of the ePrivacy Directive in 2009. Such new technologies include, among others, new internet-based services such as VoIP, instant messaging and web-based email services, which are not subject to the current ePrivacy Directive.

On 10 January 2017, the European Parliament and the European Council published the first draft of a new Regulation on Privacy and Electronic Communications, which was intended to replace the current ePrivacy Directive and be directly applicable in the EU member states, without having to be transposed into national law. The key aspects of the proposal were the following:

- applicability of privacy rules to providers of electronic communica tions services (eg, WhatsApp, Facebook Messenger or Skype);
- enhancing security and confidentiality of communications (including content and metadata, such as sender, time, location of a communication), while reducing unjustified barriers to the free flow of data;
- new opportunities for telecommunication operators to provide additional services and develop their business once consent is given for communications data content or metadata or both;
- more user-friendly and simpler rules on cookies; and
- protection against unsolicited electronic communications (spam).

The proposal included fines for breaches to the amount of up to 4 per cent of a company's global revenue or €20 million, depending on whichever was higher. The European Council published several amended drafts of the proposal since September 2017.

On 5 January 2021, the Portuguese presidency released a new version of the draft proposal and succeeded in convincing the EU member states to agree on a common position. In May 2021, the trialogue negotiations with the European Parliament finally began but there were

some points of contention regarding the current text of the Regulation. On 11 February 2025, the Commission announced in its 2025 Work Programme that it will withdraw the proposal for a new ePrivacy Regulation, which was intended to replace the current ePrivacy Directive. This decision is based on two main reasons: first, 'no agreement is expected from the co-legislators'; and second, 'the proposal is outdated in view of some recent legislation in both the technological and the legislative landscape'.

In October 2022, the European data protection authorities established a list of topics requiring harmonisation of national laws to ensure better implementation of the GDPR in the European Union. This list is part of the actions included in the EPDS Vienna Declaration on law enforcement cooperation and has been sent to the Commission for consideration. The list addresses, among others, investigative powers of data protection authorities, practical implementation of the cooperation procedure at national level, status and rights of parties to administrative proceedings, procedural deadlines, requirements for the admissibility or rejection of complaints by data protection authorities.

On 4 July 2024, the Commission introduced a new law aimed at enhancing cooperation between Data Protection Authorities (DPAs) in enforcing the GDPR in cross-border cases. This new regulation outlines specific procedural rules for authorities to follow when handling GDPR cases that impact individuals in more than one member state.

The proposed law is designed to minimise disputes and promote consensus among authorities from the early stages of the process. It will clarify the requirements for individuals when filing a complaint and ensure their active participation in the process. For businesses, the regulation will provide clarity on their rights during an investigation by a DPA into a potential GDPR violation, leading to faster case resolutions, quicker remedies for individuals, and increased legal certainty for businesses.

For DPAs, the new rules will streamline cooperation and improve the efficiency of enforcement. The regulation also includes specific rules to facilitate the effective operation of the cooperation and consistency mechanism established by the GDPR.

Law stated - 5 May 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The Commission has launched several initiatives concerning cybersecurity.

In December 2020, the European Union released its new Cybersecurity Strategy, aimed at tackling cyberattacks and at strengthening resilience against major security breaches by proposing several new initiatives. The strategy identifies three priorities:

- the increase of cyber resilience and technological sovereignty;
- to build operational capacity to prevent deter, and respond to cyberattacks; and
- to advance a global and open cyberspace through increased cooperation.

It also provides concrete proposals for regulatory, investment and policy initiatives to safeguard a global and open internet and to protect European values.

Further, the Commission adopted the Communication Strengthening Europe's Cyber Resilience System and Fostering a Competitive and Innovative Cybersecurity Industry on 5 July 2016. It sets a series of measures aiming, inter alia, at stepping up cooperation across the European Union, promoting the emerging single market for cybersecurity products and services. During this event, as part of the Digital Single Market Strategy presented in May 2015, a public-private partnership (PPP) on cybersecurity was signed. It aims to foster cooperation between public and private actors to allow people in the European Union to access innovative and trustworthy European solutions including information and communications technology (ICT) products, services and software. The PPP also aims to stimulate the cybersecurity industry by helping to align demand and supply sectors, especially in sectors where cybersecurity solutions are important, such as energy, health, transport and finance. The PPP includes a wide range of actors, from innovative small and medium-sized enterprises, producers of components and equipment, critical infrastructure opera tors and research institutes.

On 18 October 2018, the European Council called for measures to build strong cybersecurity in the European Union. EU leaders particularly referred to restrictive measures to respond to, and deter, cyberattacks. The proposal sets out new initiatives, inter alia:

- building a stronger EU cybersecurity agency;
- introducing an EU-wide cybersecurity certification scheme; and
- swiftly implementing the NIS2 Directive concerning measures for a high common level of security of network and information systems across the Union.

Institutions

The European Union Agency for Cybersecurity (ENISA) is a European cybersecurity centre of expertise, located in Greece. Founded in 2004 by Regulation (EC) 460/2004, ENISA actively contributes to a high level of network and information security within the European Union, thus contributing to the smooth functioning of the internal market.

ENISA works closely with EU member states and the private sector to provide advice and solutions. This includes:

- pan-European cybersecurity exercises;
- the development of national cybersecurity strategies;
- Computer Emergency Response Team's (CSIRT) cooperation and capacity-building;
- studies on data protection issues;
- secure cloud adoption; and
- technology aimed at improving life and trust services.

ENISA also supports the development and implementation of EU Network and Information Security policy and legislation.

After a year-long pilot phase, the EU institutions set up a permanent Computer Emergency Response Team (CERT-EU) for the EU institutions, agencies and bodies in September 2012. It is composed of a team of IT experts and cooperates closely with other CERTs in EU member states as well as with companies specialising in IT security.

On 13 September 2017, the Commission issued a proposal for a regulation on ENISA, the EU Cybersecurity Agency, and on Information and Communication Technology cybersecurity certification (the Cybersecurity Act). The Cybersecurity Act was adopted on 17 April 2019. This Regulation grants a permanent mandate for ENISA and introduces the creation of an EU certification framework for ICT products and services. The certifications will be recognised in all EU member states, making it easier for businesses to trade across borders and for purchasers to understand the security features of the product or service.

Legislation

In 2010, the Commission published a proposal for a directive on attacks against information systems, which was eventually adopted in 2013 (Directive 2013/40/EU on attacks against information systems and replacing Council Framework Decision 2005/222/JHA). Under this Directive, EU member states are required to criminalise the 'intentional access, without right, to the whole or part of an information system', at least concerning cases deemed not to be minor. It also requires that illegal system interference and illegal data interference be punished as criminal offences. Provisions also oblige EU member states to crimi nalise the instigation or aiding and abetting of any of these acts.

The is the first EU-wide piece of legislation on cybersecurity. It was adopted in July 2016 and EU member states were required to transpose it at the latest by 9 May 2018 and to identify operators of essential services by 9 November 2018. It provides for legal measures to boost the overall level of cybersecurity in the European Union and requires EU member states to adopt a national strategy on the security of network and information systems defining the strategic objectives and appropriate regulatory measures to achieve and maintain a high level of security of network and information systems.

On 13 September 2017, the Commission and the High Representative of the Union for Foreign Affairs and Security Policy published a Joint Communication on Resilience, Deterrence and Defence: Building Strong Cybersecurity for the European Union. This wide-ranging cybersecurity package builds on existing instruments and presents new initiatives to further improve EU cyber resilience and response in three key areas:

- building EU resilience to cyberattacks and stepping up the European Union's cybersecurity capacity;
- creating an effective criminal law response; and
- strengthening global stability through international cooperation.

On 11 December 2020, Regulation (EU) 2021/887 establishing the European Cybersecurity Industrial, Technology and Research Competence Centre and the Network of National Coordination Centres was adopted. It was published on 8 June 2021. The Centre, in coopera tion with the Network, is the European Union's new framework to support innovation and industrial policy in cybersecurity and relies upon financial support from the Horizon Europe and Digital Europe programmes. The Centre and the Network

together will enhance EU technological sovereignty through joint investment in strategic cybersecurity projects. The Centre is currently being set up and will be located in Bucarest, Romania.

On 13 September 2017, the Commission adopted Communication COM(2017)476 final/2, (NIS Toolkit), which aims at supporting EU member states in their efforts to implement the Directive swiftly and coherently across the European Union. It presents the best practices from the EU member states and provides an explanation and interpreta tion of specific provisions of the Directive to clarify how it should work in practice.

On 6 December 2020, the Commission published its proposal for a directive on security of network and information systems (NIS2 Directive). The NIS2 Directive was designed to update the current NIS Directive and extend its scope to strengthen European cooperation on cybersecurity. Indeed, although NIS1 significantly improved the EU level of cyber resilience, its review has revealed shortcomings that prevent it from responding effectively to current and emerging cyber security challenges. On 12 May 2022, the European Parliament and the Council reached an agreement on the NIS2 Directive. It was published in the Official Journal on 27 December 2022, and entered into force 20 days after publication, on 16 January 2023. It replaces and repeals NIS1.

The NIS2 Directive reiterates the objectives of NIS1 and takes into account the evolving cyber threats to strengthen the cybersecurity requirements and enhance cooperation between EU member states.

The NIS2 Directive extends the scope of the current NIS Directive. While NIS1 addressed the energy, transport, banking and financial institutions, health and water sectors, NIS2 Directive significantly expands the list of sectors covered and make a new distinction between:

- sectors of high criticality:
- health;
- drinking water;
- waste water;
- digital infrastructure;
- ICT services management;
- public administration;
- space; and
- other critical sectors: postal and courier services;
- waste management;
- manufacturing, production and distribution of chemicals;
- food;
- manufacturing;
- digital services providers; and
- research.

The NIS2 Directive also abolished the former distinction established by NIS1 between operators of essential services and digital service providers. Entities would be classified based on their importance, and divided into two categories: essential and important entities, according to the importance of the sectors in which they operate. These entities are subjected to different supervisory regime, with an ex ante and (or) ex post supervision depending on the whether the entity is essential or important.

Under the former NIS Directive, EU member states were responsible for determining which entities were considered to be operators of essential services. The NIS2 Directive introduces a size-cap rule which provides that all public as well as private medium-sized and large entities operating in the sectors it covers are automatically considered to be 'essential' or 'important' entities if they met the following criteria:

- employ more than 250 persons;
- have an annual turnover of more than €50 million; or
- have an annual balance sheet of more than €43 million.

The Directive also leaves it to each EU member state to establish a list of further essential and important entities as well as entities providing domain name registration services by 17 April 2025. EU member states could decide that the requirements of NIS2 would apply to public administration at national level. This list will have to be regularly reviewed, at least every two years.

The NIS2 Directive imposes stricter cybersecurity obligations and requires EU member states to ensure that essential and important entities within its scope take appropriate technical, operational and organisational measures to manage the risks related to the security of networks and information systems.

Under NIS1, each EU member state must designate a national competent authority on the security of network and information services, which will be in charge of monitoring the application of the Directive at the national level. One or more CSIRTs must be designated by each EU member state, covering at least the sectors listed in the Directive. These CSIRTs must be allocated adequate resources to carry out their tasks, which include, inter alia:

- the monitoring of incidents at a national level;
- providing early warnings, alerts, announcements and the dissemi nation of information to the relevant stakeholders;
- participating in the CSIRTs network; or
- establishing cooperation relationships with the private sector.

NIS2 expands the existing incident reporting requirements under the current NIS to require that essential and important entities must notify any significant security incident to the competent national NIS authority or one of the EU member states' CSIRTs. In particular, the NIS2 Directive introduces notification phases and deadlines. Entities are required to submit an early warning within 24 hours of becoming aware of the significant incident, and an incident notification without undue delay and in any event within 72 hours of becoming aware of the significant incident. The NIS2 Directive also formally creates the European Cyber Crisis Liaison Organisation Network, EU-CyCLONe, to support the coordinated management of large-scale cybersecurity incidents.

EU member states had until 17 October 2024 to transpose the NIS2 Directive into national law. The NIS2 Directive repeals and replaces the NIS Directive, with effect from 18 October 2024.

On 16 January 2023, Regulation (EU) 2022/2554 on Digital Operational Resilience for the financial sector (DORA) came into force, which strengthens the management of cyber threats in the EU and completes the application of NIS2 in the financial sector. The DORA Regulation addresses the digital operational resilience of the financial sector and aims to harmonise and strengthen the rules on the ICT-related risk management for EU financial entities.

DORA introduces new requirements that can be categorised into five key pillars:

- ICT risk management;
- ICT-related incidents management, classification and reporting;
- digital operational resilience testing;
- managing of ICT third-party risk; and
- information sharing arrangements in relation to cyber threats between financial institutions.

DORA also introduces a new supervisory framework for critical third-party IT service providers as well as new binding obligations for contractual agreements between third-party ICT service providers and financial entities. Each critical third-party IT service provider will be monitored by a supervisory authority, which will assess whether the service provider has adequate arrangements in place to control ICT-related risks that may impact financial institutions. DORA provides for the adoption of a series of Regulatory Technical Standards (RTS) and Implementing Technical Standards (ITS), developed by the three European Supervisory Authorities (ESAs): the European Banking Authority (EBA), the European Insurance and Occupational Pensions Authority (EIOPA) and the European Securities and Markets Authority (ESMA). The ESAs were required to submit draft RTS and ITS to the Commission by 17 January 2024 to further specify the DORA requirements. DORA and related Directive (EU) 2022/2556 have been applicable since 17 January 2025 and EU member states were required to transpose the Directive into national law by the same date.

Along with NIS2 and DORA, another EU legislative instrument aiming to strengthen cybersecurity in the EU entered into force on 16 January 2023, the Critical Entities Resilience Directive (EU) 2022/2556 (CER Directive). It replaces the European Critical Infrastructure Directive 2008/114/EC of 8 December 2008. The CER Directive focuses on strengthening the physical resilience of organisations that provide essential services to a range of threats (natural hazards, terrorists attacks, insider threats, sabotage) and covers 11 sectors:

- energy;
- transport;
- banking;
- financial markets infrastructures;
- health;

- drinking water;
- wastewater;
- digital infrastructure;
- public administration;
- space; and
- food.

To achieve a high level of resilience, EU member states are required to adopt a national strategy and carry out regular risk assessments to identify entities that are considered critical. Critical entities will need to identify the relevant risks that may significantly disrupt the provision of essential services, take appropriate measures to ensure their resilience and notify disruptive incidents to the competent authorities. EU member states have 21 months to transpose the Directive into national law.

On 15 September 2022, the Commission proposed a regulation on horizontal cybersecurity requirements for products with digital elements and amending Regulation (EU) 2019/1020 (EU Cyber Resilience Act). The proposal aims to address gaps in EU law that does not cover mandatory requirements for the security of products with digital elements. Once adopted, the Cyber Resilience Act would apply to all products with digital elements whose intended and reasonably foreseeable use includes a direct or indirect logical or physical data connection to a device or network.

On 18 April 2023, the Commission proposed a regulation on the EU Cyber Solidarity Act laying down measures to strengthen solidarity and capacities in the Union to detect, prepare for and respond to significant and large-scale cybersecurity threats and incidents. It aims to make Europe more resilient and responsive to cyber threats, while strengthening the existing cooperation mechanism. The Commission proposes the establishment of a European Cyber Shield, a pan-European infrastructure composed of national and cross-border Security Operations Centres across the EU tasked with detecting and acting on cyber threats. The actions proposed under the Cyber Solidarity Act cover situational awareness, information sharing, as well as support for preparedness and response to cyber incidents. The Regulation would also establish the Cybersecurity Incident Review Mechanism to assess and review specific or large-scale cybersecurity incidents. The EU Cyber Solidarity Act also creates an EU Cybersecurity Reserve, consisting of incident response services from private service providers – 'trusted providers' – on request of EU member states, EU institutions, bodies and agencies, to help them address significant or large-scale cybersecurity incidents.

On 7 January 2024, the new Cybersecurity Regulation (Regulation (EU) 2023/2841) laying down measures for a high common level of cybersecurity at the institutions, bodies, offices and agencies of the European Union entered into force. The purpose of this amendment is to ensure an adequate level of cybersecurity for ICT products, ICT services and ICT processes in the European Union.

The Regulation introduces measures for the establishment of an internal cybersecurity risk-management, governance and control framework for each EU entity. It also establishes a new Interinstitutional Cybersecurity Board (IICB) to monitor and support its implementation by EU entities. It provides an extended mandate of the CERT for the EU institutions, bodies, offices and agencies (CERT-EU). This expanded role transforms

CERT-EU into a hub for threat intelligence, information exchange, and incident response coordination. It also designates CERT-EU as a central advisory body and service provider. In line with its mandate, CERT-EU is renamed to Cybersecurity Service for the Union institutions, bodies, offices and agencies, but it retains the short name CERT-EU.

In accordance with the timeline defined in the Regulation, the EU entities will establish internal cybersecurity governance processes and will progressively put in place specific cybersecurity risk-management measures foreseen by the Regulation. The IICB will be established and operationalised promptly, with the aim of providing strategic direction to CERT-EU under its expanded mandate, offering guidance and support to EU entities, and monitoring the Regulation's implementation.

Law stated - 5 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

Big data plays a major role in the European Union and was subject to various actions taken by EU institutions. The European Union recognises the potential of big data as a driver of the economy and innovation in its EU Digital Single Market Strategy and points out that it is becoming essential to the development of data-driven technologies and services. The European Council marked big data as a high priority in its political agenda in October 2013. In the context of the action plan of 2 July 2014 on how to maximise the EU's data-driven economy, the Commission recommended investing in big data solutions and infrastructure. In this context, it suggested setting up a €2.5 billion big data PPP, creating a network to help individuals build sustainable businesses using big data and adopting new rules on data ownership and liability.

The European Data Protection Supervisor (EDPS) stressed the importance of coherent rights enforcement in the age of big data in several opinions and initiatives. The EDPS is an independent institution of the European Union responsible for ensuring the protection of an individual's rights in the context of processing personal data. It set up the Ethics Advisory Group in February 2016, which assesses the ethical implications of how personal data is defined and used in the context of big data and artificial intelligence.

As requested in the EDPS opinion of 23 September 2016, a voluntary network of regulatory bodies (the Digital Clearing House) was established. The goal of the Digital Clearing House is to share information about possible abuses in the digital ecosystem and the possibilities to handle them. The report also recommends that the EU institutions, together with external experts, investigate the possibility to create a common cyberspace where individuals can interact without being tracked.

The text of a European Parliament resolution on the implications of big data on fundamental rights was tabled by rapporteur Ana Gomes in October 2016. The European Parliament passed this non-legislative resolution on 14 March 2017. The European Parliament stressed that the immense opportunities of big data could only be fully enjoyed by citizens and institutions within the European Union if public trust in new technologies was ensured

by strong enforcement of fundamental rights, compliance with current EU data protection law and legal certainty for all actors involved. According to the resolution, big data analytics pose specific challenges to fundamental rights and raise concerns over discrimination and security. The most pressing risks associated with data processing activities include security breaches, unauthorised access to data and unlawful surveillance. In that regard, the European Economic and Social Committee has published a study concerning the ethics of big data and how to balance its economic benefits and ethical questions of it in the EU policy context.

According to the European Parliament, the intrinsic purpose of big data analysis should be the achievement of comparable correlations with as little personal data as possible. Science, business and public communities should therefore focus on research and innovation in the field of data anonymisation. The resolution also points out that it is of particular importance to raise the awareness of EU citizens about digital rights, privacy and data protection. It concludes that the corresponding risks in the context of big data analysis should be addressed with specific guidelines, more transparency and accountability.

Together with various initiatives in the field of public-sector data, research data and private-sector data, the Commission announced its intention to fund a support centre for data sharing under the Connecting Europe Facility. This support centre will make it easier to share private-sector data by providing best practices and know-how. Also, the Commission announced several initiatives that will make different types of data available for re-use in Communication COM(2018)232 final Towards a Common European Data Space and accompanying Commission Staff Working Document SWD(2018)125 final Guidance on Sharing Private-Sector Data in the European Data Economy. This Staff Working Document aims to provide a toolbox on legal, business and technical aspects of data sharing and transfers for companies that are data holders or data users.

On 19 February 2020, the Commission published Communication COM(2020)66 'A European strategy for data', which outlines a strategy for policy measures and investments to enable the data economy for the coming five years. This Communication announces the creation of nine European common spaces and the continuation of work on the European Open Science Cloud. This data strategy is presented at the same time as the Commission's Communication on 'Shaping Europe's digital future' and a white paper on artificial intelligence. That same day, the Commission launched a public online consultation regarding the European strategy for data.

As part of its data strategy, on 25 November 2020, the Commission released a Regulation on European data governance (the Data Governance Act), which plays a vital role in ensuring the European Union's future leadership in the global data economy. This new regula tion aims to create a framework that encourages greater reuse of data by increasing trust in data intermediaries and strengthening various data-sharing mechanisms across the European Union. It complements the Open Data Directive of 20 June 2019, which regulates and encourages the re-use and publication of public sector information held or funded by public institutions (such as governments, libraries and archives). The European Parliament and EU member states have reached a political agreement on the Commission's proposed Regulation on European data governance in December 2021. The Regulation has been validated in a plenary vote of the European Parliament, and in the European Council on 16 May 2022 following EU Parliament approval. It entered into force on 23 June 2022 and, following a 15-month grace period, will be applicable as from September 2023.

On 23 February 2022, the Commission released the European Data Act, a proposal for a regulation to establish a harmonised framework for data sharing in the European Union. The proposal aims at making more data available for reuse and is expected to create €270 billion of additional gross domestic product by 2028.

This proposal includes:

- measures to allow users of connected devices to gain access to data generated by them;
- measures to rebalance negotiation power for small and medium-sized companies by preventing abuse of contractual imbalances in data-sharing contracts;
- measures for public entities to request access and use of the data held by the private sector that is necessary for exceptional circum stances; and
- measures on cloud and data processing services to further allow customers to switch between services providers.

The Data Act entered into force on 11 January 2024, after lengthy EU-level negotiations. The Data Act will become applicable on 12 September 2025, except for certain provisions that will be implemented at a later date. The new rules will encourage the use of data and ensure it is shared, stored and processed in full respect of European rules.

The Data Act also enables the public sector to access and use data held by the private sector to help respond to public emergencies, such as floods and wildfires. It will also protect European businesses from unfair contractual terms in data sharing contracts, so that small businesses can take part more actively in the data market.

On 13 April 2024, the European Parliament approved the Artificial Intelligence Act (AIA), which aims to establish a common horizontal regulatory framework for artificial intelligence systems within the EU internal market. It provides for the implementation of a compliance approach, based on the adoption of data governance throughout the life cycle of a product or service based on artificial intelligence.

The AIA stands as the world's first comprehensive AI legislation. Its primary objective is to shield fundamental rights, democracy, rule of law, and environmental sustainability from the risks posed by high-risk AI, while simultaneously fostering innovation and positioning Europe as a global leader in the AI sector. The regulation imposes obligations on AI based on a risk-based approach, categorising AIs into 'unacceptable', 'high', 'limited', 'minimal' risk, and a category for general-purpose AI (GPAI).

The AIA entered into force on 1 August 2024 and its provisions apply on various dates in accordance with a phased roll-out, depending on the type of AI application:

- for 'unacceptable risk' AI systems – 2 February 2025;
- for codes of practice for general-purpose AI systems – 2 May 2025;
- for general-purpose AI systems – 2 August 2025;
- for certain 'high-risk' AI systems – 2 August 2027; and
- for all other obligations – 2 August 2026.

The AIA also provides for clear definitions for the different actors involved in the AI ecosystem: AI providers, deployers, importers and distributors.

Most obligations fall on the providers of high-risk AI systems, whether they are based within the European Union or in a third country. Indeed, like the GDPR, the AI Act has an extraterritorial effect, applying to providers outside the European Union, if the outcomes produced by the system are intended for use within the European Union. The focus is therefore on whether the impact of the AI system occurs within the European Union, regardless of the provider location.

The majority of the Act's provisions focus on high-risk AI systems, which are subject to regulation. While AI applications deemed to pose unacceptable risks are prohibited, AIs with limited risk are subject to lighter transparency obligations: developers and deployers must ensure end users are aware they are interacting with an AI system. AIs with minimal risk are not subject to regulation. For general-purpose AI, transparency requirements are enforced, with additional obligations required for general-purpose AI with systemic-risk.

Unacceptable risk AI systems

AI systems that pose an unacceptable risk are 'prohibited' under the AIA, as they are considered a threat to the fundamental rights of individuals, will be banned. These include:

- subliminal manipulation: AI systems that employ subliminal, manipulative, or deceptive techniques to alter behaviour;
- exploitation of vulnerabilities: AI systems that exploit the vulnerabilities of specific groups (such as the elderly or disabled people or children) to alter behaviour;
- biometric categorisation: AI systems that categorise individuals based on sensitive characteristics such as race, political opinions, trade union membership, religious or philosophical beliefs, sex life, or sexual orientation;
- social scoring: AI systems that evaluate or classify individuals based on their behaviour, socio-economic status, or personal traits, leading to detrimental or unfavourable treatment;
- real-time remote biometric identification: AI systems used in publicly accessible spaces for the purpose of law enforcement, such as facial recognition systems, are prohibited, subject to narrow exceptions;
- emotion recognition: AI systems used for emotion recognition in workplaces and educational institutions, unless it is for medical or safety reasons; and
- untargeted scraping: the untargeted scraping of the internet or CCTV for facial images to build or expand databases is prohibited.

In February 2025, the Commission published the Guidelines on prohibited AI practices, as defined by the AIA, to ensure consistent, effective and uniform application of the Act.

High-risk AI systems

AI systems that have negative impacts on safety, fundamental rights, the environment, democracy and the rule of law will be classified as high risk. These will be the most

regulated systems permitted in the EU market. High-risk AI systems are divided into two categories:

- AI systems that are incorporated into products subject to EU product safety legislation, which include items such as toys, aviation, automobiles, medical devices and lifts; and
- AI systems that fall into specific sectors that must be registered in an EU database, which include AI systems used in health, education, recruitment, critical infrastructure management, law enforcement or justice.

High-risk AI providers must establish a risk management system before they are placed on the market and also throughout the high-risk AI system's lifecycle, provide instructions for use and ensure human oversight. Citizens may submit complaints about AI systems and receive explanations about decisions based on high-risk AI systems that may affect their rights.

General Purpose AI systems

A General Purpose AI (GPAI) system is an AI model designed to serve a wide range of functions. It can be used directly or incorporated into other AI systems. GPAIs are will have to comply with transparency requirements (users may be inform that the content has been generated by AI) and EU copyright law. The AIA considers the potential systemic risks that could arise from GPAI models, including large generative models like the advanced GPT-4 AI model. GPAI models that may pose systemic risks are subject to extra requirements (namely, performing model evaluations, assessing and mitigating systemic risks, and incident reporting).

Limited-risk AI systems

AI systems that fall under the limited-risk category, such as chatbots, specific emotion recognition systems, biometric categorisation systems, and systems that produce deepfakes, will be subject to minimal transparency requirements. Any content that has been created or altered using AI must be clearly marked as AI-generated so that users can easily identify when they encounter such content.

All other AI systems not specifically addressed by the new regulations can be developed and used subject to the existing legislation without additional legal obligations. Providers may voluntarily opt to comply with the requirements for trustworthy AI and adhere to voluntary codes of conduct.

To facilitate a smooth transition before the AIA comes into full effect, the Commission has launched the AI Pact. This initiative encourages industry players to voluntarily commit to anticipating the AIA and begin implementing its requirements ahead of the legal deadline.

Law stated - 5 May 2025

Data localisation

Are there any laws or regulations that require data to be stored locally in the jurisdiction?

The GDPR contains provisions concerning international transfers of data, but it contains no data localisation obligations. Conversely, the principle of the free flow of data is enshrined in the GDPR. At the time of writing, no specific legislation or regulation is yet in place at the EU level concerning data localisation.

Some EU member states have adopted data localisation laws. For instance, Germany has passed the Data Retention Act, which requires public electronic communication and internet providers to retain various call detail records for law-enforcement purposes. The European Union is concerned that this type of rule might hinder the free flow of data. The then Digital Single Market vice president, Andrus Arsip, declared that:

> Data should be able to flow freely between locations, across borders and within a single data space in the EU, data flow and data access are often held up by localisation rules or tech nical and legal barriers.

The Building European Data Economy initiative, part of the Digital Single Market strategy, aims at fostering the best possible use of the potential of digital data to benefit the economy and society. Following the adoption of a Communication on Building a European Data Economy, a Staff Working Document in January 2017 and a public consultation, Regulation (EU) 2018/1807 on a framework for the free flow of non-personal data in the European Union was adopted. The Regulation entered into force in December 2018, with effect in June 2018. This Regulation prohibits EU member-state governments from putting in place data localisation restrictions, except if they are required for national security and similar objectives because these represent a form of protectionism for which there is no place in a true single market. The goal is to create legal certainty for businesses, with reassurance that they can process their data anywhere in the European Union. According to the Council of Europe, it will, in the long run, increase trust in cloud computing and counter vendor lock-in, resulting in a more competitive cloud-computing market and a boost of operational efficiency for EU businesses that operate across borders.

Law stated - 5 May 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

On 18 November 2022, the Commission issued the Proposal for a Regulation laying down measures for a high level of public sector interoperability across the EU (Interoperable Europe Act). The objective of the proposal is to promote the cross-border operability of the network and information system used to provide or manage public services by introducing a cooperation framework for public administrations across the European Union.

The adoption of the Gigabit Infrastructure Act (Regulation (EU) 2024/1309) marks a major regulatory shift to accelerate the roll-out of very high-capacity networks (VHCNs), such as fibre and 5G. It replaces the Broadband Cost Reduction Directive (Directive 2014/61).

On 28 June 2025, the European Accessibility Act (Directive 2019/882) becomes fully applicable across the European Union. From that date, electronic communications services provided to consumers will be required to comply with harmonised EU accessibility requirements, with the exception of machine-to-machine transmission services, which are expressly excluded from the scope of the Directive.

In January 2025, BEREC adopted its Outline Work Programme for 2026, reaffirming its commitment to the core regulatory tasks defined under the EECC Directive. The programme maintains BEREC's four key objectives:

- promoting connectivity and access to VHCNs;
- promoting competition and efficient investment,
- contributing to the development of the internal market, and
- promoting the interests of the citizens of the Union.

The 2026 programme also marks a transition point, as BEREC's current Strategy for 2021–2025 is set to expire by the end of the year. A new Strategy for 2026–2030 will be adopted in late 2025. In anticipation of this, BEREC has published its Action Plan for 2030, setting out long-term priorities to ensure that Europe's regulatory environment remains fit for purpose throughout the digital decade.

The Action Plan outlines five strategic orientations:

1. fostering national and international connectivity to reach the objectives of Europe's Digital Decade by 2030;
2. facilitating an open and sustainable Internet ecosystem and monitoring the evolution of the digital landscape;
3. providing for the security and resilience of the networks and services;
4. contributing to the achievement of environmental sustainability goals; and
5. strengthening BEREC's agility, independence, inclusiveness, and efficiency as a centre of expertise.

Law stated - 5 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

Articles 167 and 173 of the Treaty on the Functioning of the European Union (TFEU) can be considered the legal basis for audiovisual policy in the European Union, with the main objective being to create a single European market for audiovisual services. It encourages

cooperation between the EU member states, in particular, in the audiovisual sector, and supports them where necessary. Within the European Union, the European Commission (the Commission) is responsible for any media policy.

Within the European Union, audiovisual media services (including broadcasting and on-demand services) are broadly regulated under Directive 2010/13/EU (Audiovisual Media Services Directive) (AVMS Directive). The AVMS Directive was adopted to codify and harmonise the existing legislation concerning audiovisual media services. Audiovisual media service is defined under article 1, paragraph 1a, of the AVMS Directive, as a service that is:

> under the editorial responsibility of a media service provider and the principal purpose of providing programmes, to inform, entertain or educate, to the general public by electronic communications network

On 6 November 2018, the Commission adopted a revised version of the AVMS Directive, Directive 2018/1808 (AVMS Directive 2.0). EU member states had to transpose the new rules into their national legislation by 19 September 2020. AVMS Directive 2.0 ensures that EU regulation is adapted to the advanced convergence of audiovisual media services and current technological developments.

AVMS Directive 2.0 applies to broadcasts over terrestrial, cable, satellite and mobile networks as well as over the internet (platform and technology neutrality). It distinguishes between linear services (which push content to viewers, eg, by broadcasting via traditional television, internet or mobile phones) and non-linear services (which pull content from a network, eg, video-on-demand services), as well as video-sharing platforms (which, without bearing editorial responsibility, provide programmes and user-generated videos, or both). Under AVMS Directive 2.0, all three services are subject to tight regulations.

The AVMS Directive, in particular, aimed to harmonise national rules on:

- regulation of television broadcasts, including satellite broadcasts, under the country of origin, including the right for EU member states to restrict the retransmission of unsuitable broadcast content from another EU member state;
- promotion, production and distribution of television programmes within the European Union, including quotas for EU-produced content and content made by independent producers;
- access by the public to major (sports) events;
- television advertising, product placement and programme sponsorship;
- protection of minors from unsuitable content; and
- the right of reply (of any natural or legal person whose legitimate interest has been damaged by an assertion in a television programme).

AVMS Directive 2.0 added in particular the following new elements:

- providing broadcasting companies with more flexibility on the time frame of television advertising;
- the general permission of product placement;

- simplification of the country-of-origin principle;
- clarification of cooperation procedures between EU member states;
- extension of the provisions on EU-produced content to on-demand service providers;
- alignment of the rules on the protection of minors for television broadcasting and on-demand services; and
- extension of the scope of applicability of the AVMS Directive on video-sharing platforms.

On 1 May 2024, the European Media Freedom Act (the EMFA) (Regulation (EU) 2024/1083) entered into force. The majority of its provisions will become finally applicable on 8 August 2025. The EMFA contains both procedural and substance rules as well as a revised regulatory framework for regulatory cooperation to address identified problems like uncoordinated national rules and procedures related to media pluralism, insufficient cooperation between national media regulators and interference in editorial decisions of media services . The aim EFMA is to contribute to the functioning of the internal media market – the essential characteristics of which are democracy and the rule of law. For these purposes, the EMFA is built on the AVMS Directive and AVMS Directive 2.0; it refers to some regulations and definitions, but also amends some clauses. As the EMFA does not clearly define its relationship with AVMS and AVMS 2.0 Directive, it is necessary to check each provision carefully and whether it applies and, if so, as to which modifications.

An important institutional change resulting from the EMFA is the replacement of the European Regulators Group for Audiovisual Media Services (ERGA) by the European Board of Media Services. The European Board of Media Services consists of national media authorities and will promote the effective and consistent application of the EU media law framework, in particular by assisting the Commission in preparing guidelines on media regulatory matters. It commenced its work in February 2025.

The EMFA adds and amends, among others, the following provisions:

- protection of editorial independence;
- protection of journalistic sources including strong safeguards against the use of spyware against media, journalists and their families;
- ensuring the independent operation of public service media including adequate and stable funding;
- protection of media from unjustified deletion of content by very large online platforms;
- requirements for transparent state advertising on media service providers and online platforms; and
- introduces the right to personalise media offerings on devices and via interfaces.

In February 2018, Regulation (EU) 2018/302 on addressing unjustified geo-blocking and other forms of discrimination (Geo-Blocking Regulation) was adopted and entered into force on 22 March 2018. The regulation took effect on 3 December 2018 and aims to prevent geo-blocking – whereby businesses discriminate (private or commercial) end

customers in obtaining goods or certain services being offered within the European Union. To this end, the following measures are prohibited:

- electronic measures blocking or restricting the access of end customers to online offers of goods or services (non-finance, gambling, healthcare and transportation) based on their nationality, residence or customer place of establishment; and
- indirect restrictions on cross-border online trade, including discriminatory use of general terms and conditions (including prices, conditions and acceptance of payment methods).

The Geo-Blocking Regulation currently does not cover audiovisual content (eg, e-books, online music, software and video games). On 20 November 2020, the Commission published a report on the first short-term review of the Geo-Blocking Regulation. Concerning extending the scope of the Geo-Blocking Regulation, the report identifies potential benefits, particularly for audiovisual content, the availability of which is often limited within the national territory. However, the report also identifies possible challenges for investment in content production and implications for the overall sector ecosystem and welfare impact requiring further assessments. Overall, the effects of extending the scope of the Regulation would largely depend on copyright-licensing practices and copyright-law considerations. Therefore, it remains to be seen whether the scope of the Geo-Blocking Regulation will be extended shortly. A formal review of the Geo-Blocking Regulation is planned for 2025.

Law stated - 5 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

The ownership of broadcasters is, to a great extent, regulated by the EU member states under their national broadcasting laws. National law must, however, comply with EU law, including (among others) the provisions of the TFEU, the AVMS Directive 2.0 and the EMFA.

EU law prohibits, in particular, any discrimination on grounds of nationality. Consequently, foreign ownership restrictions are generally prohibited. EU law also prohibits any actions that can prevent or impede the activities of persons or companies established in other EU member states. The TFEU outlines the following fundamental freedoms with which any national laws must comply:

- article 34: prohibition of national restrictions on the freedom of movement of goods within the European Union (eg, including material, sound recordings and other apparatus for broadcasting);
- article 49: the right of EU citizens and companies to establish busi nesses in other EU member states (eg, including broadcasting businesses);

- article 56: prohibition of national restrictions on the freedom to provide services by EU citizens (eg, including television and radio broadcasting); and
- article 63: free movement of capital in the European Union (eg, including, capital for purchasing shares in a company).

National laws restricting any of these fundamental freedoms may be compliant with EU laws under certain circumstances (eg, where neces sary for public safety or public health reasons) or in the case of an overriding public interest (eg, maintenance of the social order, protection of consumers' rights, guarantee of the freedom of speech and plurality of media). However, such restrictions have to be interpreted narrowly and must be objectively justified.

According to recitals 8 and 94 of the AVMS Directive, EU member states shall prevent any actions that create dominant positions or a concentration of media ownership and shall contribute to the promotion of media pluralism.

The EMFA now requires all EU member states to introduce national rules on transparency regarding information on media ownership, turning the previously optional possibility into a binding obligation (article 6, recitals 32–35). This includes information obligations for all media service providers not only on contact details but also on financial backgrounds as well as information about owners who are able to influence the operation and strategic decisions of the media service and about the public funds the provider has received for advertising. This information must be made easily and directly accessible to the recipients.

In similar vein, Regulation (EU) 2019/452 establishing a framework for the screening of foreign direct investments encouraged member states in their review of foreign direct investments to consider the freedom and pluralism of the media as a factor in determining whether a foreign direct investment is likely to affect security or public order.

Law stated - 5 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

The licensing requirements, fees and timescales for authorisations are generally regulated by the EU member states. The AVMS Directive, however, specifies which EU member state is competent to regulate a broadcaster (under the country-of-origin principle) and sets out certain common minimum requirements and standards with which broad casters have to comply and that are enforceable by national authorities. These minimum standards include, among others:

- transparency and information obligations;
- prohibition on discrimination based on race, religion or nationality;
- accessibility for users with a visual or hearing disability;
- prohibition of surreptitious or subliminal commercial communication;
- rules on commercial communications for alcoholic beverages;

- protection of cinematographic works;
- protection of minors; and
- promotion of EU and independent works.

AVMS Directive 2.0 further introduced, among other things:

- prohibition of incitement to violence or hatred directed against any groups or members of such groups because of an affiliation to one of the categories that are subject to equal treatment principles (eg, race, religion or nationality) (as per article 21 of the EU Charter of Fundamental Rights);
- prohibition of public provocation to commit a terrorist offence; and
- even stronger rules on commercial communications for alcoholic beverages.

EU member states are not entitled to apply less stringent rules to broadcasters but may impose stricter rules on audiovisual media service providers under their jurisdiction, provided that these do not violate fundamental rights.

In light of the war in Ukraine, legislation has been put into force to invalidate the broadcasting licences of Russian broadcasters and ban them from broadcasting. Pursuant to Regulation (EU) 833/2014, as amended, broadcasting licences or authorisation, transmission and distribution arrangements with certain media outlets, such as Russia Today and Sputnik, are suspended from 1 March 2022 onwards. Decision (CFSP) 2025/394 extends the suspension of broadcasting licences in the European Union for Russian media which are under the permanent control of the Russian leadership.

Law stated - 5 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

According to the AVMS Directive, EU member states shall ensure, where practicable, that broadcasters reserve a majority of their production, budget and transmission time (except for time allocated to news, sport, games, advertising, teletext services and teleshopping) for 'European works' (as defined in article 1 of the AVMS Directive). EU member states shall report on the implementation of this obligation. Such report shall, in particular, include a statistical statement on the achievement of the proportion for each television programme.

EU member states shall also ensure, where practicable, that broadcasters reserve at least 10 per cent of their transmission time for European works supplied by independent producers. Alternatively, EU member states may reserve at least 10 per cent of their program ming budget for independent European works. EU member states shall define such 'independent works', taking into account the ownership of the production company, the number of programmes supplied to the same broadcaster and the ownership of secondary rights.

The AVMS Directive does not distinguish services through trans mission (eg, online or mobile content). It rather distinguishes between linear and non-linear services. To the extent online or mobile content qualifies as audiovisual media services, they are, thus, regulated in the same way as 'traditional' broadcast networks and fall under the scope of the AVMS Directive.

AVMS Directive 2.0 introduced a content quota according to which providers of non-linear services must secure at least a 30 per cent share of European works in their catalogues and ensure prominence of those works. However, this quota shall not apply to media service providers with a low turnover or a low audience.

In light of the war in Ukraine, legislation has been put into force to invalidate the broadcasting licences of Russian broadcasters and ban them from broadcasting. Pursuant to Regulation (EU) 833/2014, as amended, it is prohibited for operators to broadcast or to enable, facilitate or other wise contribute to broadcast, any content by certain media outlets, such as Russia Today and Sputnik, including through transmission or distribution by any means such as cable, satellite, internet protocol TV, internet service providers, internet video-sharing platforms or applications, whether new or pre-installed, from 1 March 2022 onwards. Under the EMFA, the newly established European Board for Media Services shall coordinate relevant measures where a media service from outside the Union or provided by media service providers established outside the Union prejudices or presents a serious and grave risk to public security (article 17).

Law stated - 5 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

The delivery of television advertising, sponsorship and teleshopping are broadly regulated by the AVMS Directive. A prerequisite for the applicability of the AVMS Directive is that the online service is qualified as an audiovisual media service or as a video-sharing platform.

The AVMS Directive aims at protecting consumers against excessive television advertising. It, therefore, outlines strict rules to ensure consumer protection, stipulating, in particular, that television advertising and teleshopping shall be recognised as such and shall be distinguishable from editorial content, either by optical, acoustic or spatial means. It allows for an interruption of the transmission of films (excluding series, serials and documentaries) once for each scheduled period of at least 30 minutes. Under the AVMS Directive, the proportion of television advertising and teleshopping spots within a given hour was not permitted to exceed a total of 20 per cent. Under the AVMS Directive 2.0, broadcasting companies are provided with more flexibility on the time frame of television advertising, changing the limit for advertising from 20 per cent per hour to 20 per cent per day (between 6am and 6pm and between 6pm and 12pm).

The AVMS Directive prohibits certain types of advertising, namely, advertising or teleshopping inserted during religious services and tele shopping for medicinal products subject to a marketing authorisation or medical treatment. It also restricts the advertising

of alcoholic beverages to a large extent. However, AVMS Directive 2.0 widely waived the ban on product placement.

In addition to the restrictions under the AVMS Directive, Directive 2003/33/EC (Tobacco Advertising Directive) contains an EU-wide ban on cross-border tobacco advertising and sponsorship in the media other than television. The ban covers print media, radio, internet and events' sponsorship involving several EU member states (eg, the Olympic Games or Formula One racing).

Aiming to tackle one aspect of biased allocation of economic resources in the media sector, the EMFA contains rules on state advertising (article 25). The term 'state advertising' is intended to be understood broadly and means any placement, highlighting, publication or dissemination of an advertisement, self-promotion, public communication, information media campaign in a media service or an online platform by or for a public authority or public body. The term 'state advertising' must be distinguished from the term 'political advertising', which is governed by Regulation (EU) 2024/900.

In March 2024, the EU adopted Regulation (EU) 2024/900 on the transparency and targeting of political advertising. It will fully enter into force 10 October 2025. The rules will require any political advertisement to be clearly labelled as such and include information such as who paid for it and how much. Political targeting and amplification techniques will need to be explained publicly in unprecedented detail and the use of sensitive personal data for such activities without the explicit consent of the individual will be banned. The proposed Regulation builds on and complements relevant EU law, including the General Data Protection Regulation and the Digital Services Act.

In general, any form of advertising is also subject to the fundamental principles of human dignity, non-discrimination on the grounds of race, nationality, religious or political belief as well as the protection of minors, health, safety and the environment. Further, Directive 2006/114 concerning misleading and comparative advertising stipulates general requirements for advertising, irrespective of the means of transmission. Additionally, article 13 of Directive 2002/58/EC on privacy and electronic communications establishes certain requirements for unsolicited communications such as electronic mail for direct marketing. These rules must be implemented into national law by the EU member states.

In 1992, advertising industry representatives in Europe launched the European Advertising Standards Alliance (EASA), an independent coordinating body promoting responsible advertising. EASA provides detailed guidance on how to advertise self-regulation for the benefit of consumers and businesses. It has become the single authoritative voice on advertising self-regulation and promotes high ethical standards in commercial communications. In 2016, the Commission explicitly recognised the role and effectiveness of advertising self-regulation.

Depending on the sector, additional national legislation on advertising remains possible. For example, with regard to gambling advertising, there are separate member-state regulations. Most states of the European Union have imposed certain restrictions, including the requirement to obtain a licence to be allowed to advertise. In many cases, the national regulations are aligned with the 2020 'Code of Conduct on Responsible Advertising for Online Gambling' by the European Gaming and Betting Association. For example, in 2021, Germany's new State Treaty on Gambling (GlüStV 2021) came into force. According to the GlüStV 2021, holders of a licence for games of chance pursuant to paragraph 4 of the

GlüStV 2021 are allowed to advertise their services, subject to provisions for the type and scope of advertising set out in paragraph 5 of the GlüStV 2021 (which are in addition to the require ments set out in other applicable legislation, eg, media law).

Law stated - 5 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

According to article 31, paragraph 1 of Directive 2002/22/EC (Universal Service Directive), EU member states may impose must-carry obliga tions for the transmission of specific broadcast channels or services on companies providing electronic communications networks for the distribution of radio or television broadcast (eg, cable companies or telecoms operators). The prerequisite is that a significant number of end users use such networks as the principal means for radio and television broadcasts.

Must-carry obligations shall only be imposed to the extent necessary to meet clearly defined objectives of general interest (eg, media plurality). According to the Court of Justice of the European Union, economic considerations would not be considered general-interest obligations.

The rules for must-carry obligations must be transparent, proportional and subject to periodical review at least every three years. They must be clearly identified and based on objective non-discriminatory criteria known in advance. Broadcasters and network operators have to be able to know their specific rights and obligations.

Must-carry obligations may also entail a provision for proportional remuneration. However, it must be ensured that there is no discrimination in the treatment of different companies providing electronic communications networks in similar circumstances.

Article 31, paragraph 1 of the Universal Service Directive does not cover the content of the services delivered (eg, which broadcasters benefit from must-carry obligations). Such content issues are, however, subject to the principles of non-discrimination and proportionality.

AVMS Directive 2.0 introduced a content quota of 30 per cent share of European works. Where EU member states require media service providers under their jurisdiction to contribute financially to the produc tion of European works, including via direct investment in content and contribution to national funds, they may also require media service providers targeting audiences in their territories, but established in other EU member states to make such financial contributions, which shall be proportionate and non-discriminatory.

Such financial contribution shall be based only on the revenues earned in the targeted EU member states. If the member state where the provider is established imposes such a financial contribution, it shall take into account any financial contributions imposed by targeted EU member states. However, the obligation to contribute financially to the production of European works shall not apply to media service providers with a low turnover or a low audience.

Law stated - 5 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

The delivery of new media content is regulated by the AVMS Directive, if and as far as it qualifies as an audiovisual media service.

Regulation (EU) 2017/1128 on cross-border portability of online content services (the Portability Regulation) obliges providers of online content, including audiovisual media services, to enable paying subscribers to access and use such service under terms equal to the offering at each subscriber's residence, within all EU member states.

If a service does not qualify as an audiovisual media service, it is covered by Directive 2000/31/EC (e-Commerce Directive). A prerequisite for the applicability of the e-Commerce Directive is that the service qualifies as an information society service. According to article 1, para graph 1 of Directive 98/34/EC (Information Society Services Directive), such information society service is any service normally provided for remuneration, at a distance, by electronic means and at the individual request of the recipient of the service (eg, web-based content, video portals, e-commerce and web-hosting).

Similar to the AVMS Directive, the e-Commerce Directive is also based upon the country-of-origin principle. A provider of information society services is therefore generally subject to regulation in the EU member state in which it has its establishment. In general, providers of information society services do not require prior authorisation under the AVMS Directive or the e-Commerce Directive.

On 16 November 2022, Regulation (EU) 2022/2065 on a Single Market For Digital Services (Digital Services Act) (DSA), entered into force, amending the e-Commerce Directive. The expressed purpose of the DSA is to update the EU's legal framework, in particular by modernising the e-Commerce Directive adopted in 2000. The DSA is directly applicable across the European Union and became effective on 17 February 2024.

The DSA contains EU-wide due diligence obligations that will apply to all digital services that connect consumers to goods, services, or content, including new procedures for faster removal of illegal content as well as comprehensive protection for users' fundamental rights online.

In the scope of the DSA are various online intermediary services. Their obligations under the DSA depend on their role, size, and impact on the online ecosystem. These online intermediary services include (among others):

- intermediary services offering network infrastructure;
- hosting services such as cloud computing and web hosting services; and
- online platforms bringing together sellers and consumers such as online marketplaces and social media platforms.

Building on the DSA, the EMFA includes safeguards against the unjustified removal of media content on very large online platforms produced according to professional standards. In cases not involving systemic risks such as disinformation, very large online platforms that intend to take down certain legal media content considered to be contrary to the platform's policies will have to inform the media service providers about the reasons, before such take down takes effect. Any complaints lodged by media service providers will have to be processed with priority by those platforms.

On 6 May 2015, the Commission adopted the Digital Single Market Strategy, which announced a legislative initiative on harmonised rules for the supply of digital content and services and online and other distance sales of goods. These initiatives were followed by two new directives.

Directive (EU) 2019/770 on certain aspects concerning contracts for the supply of digital content and digital services was enacted on 10 June 2019. It shall be transposed into EU member states' national law by 11 June 2021. This Directive creates a holistic framework for business-to-consumer transactions regarding digital content and digital services. 'Digital content' means data created and made available in digital form (eg, audio and video content, video games and other software). Digital services are such that enable processing of or access to digital data; or interaction with data uploaded by any user of the service (eg, over-the-top communications services). EU member states are free to adopt this framework for business-to-business transactions as well. The Directive stipulates criteria for defects in digital content and services, and minimum standards for sellers' warranty obligations (eg, provision of updates). Guidance on the relation between (IT and cybersecurity) vulnerabilities and defectiveness in such products, however, is not included. Warranty obligations for digital content and services might also be imposed on sellers of hardware with pre-installed software (apart from those according to Directive (EU) 2019/771).

Directive (EU) 2019/771 on certain aspects concerning contracts for the sale of goods entered into force on 11 June 2019. It shall be transposed into EU member states' national law by 1 July 2021 and enforced no later than 1 January 2022. The initial proposal envisages the regulation of online and other distance sales of goods. However, the enacted version aims to ensure the proper functioning of the internal market, while providing consumers with a high level of protection. It does so by laying down certain common rules on sales contracts between sellers and consumers. These cover:

- conformity of goods with the contract;
- remedies if there is no conformity;
- ways to exercise these remedies; and
- commercial guarantees.

Law stated - 5 May 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

According to the Commission, the European Union is leading the world in switching from analogue to digital television. The Commission recommended that switch-off in all EU member states should be completed by 2012. By the end of 2015, all EU member states had finally completed the switchover.

The re-farming of freed-up spectrum is mainly regulated by the RSPP, which was established in 2012. The RSPP covers all types of radio spectrum use and sets general regulatory principles and policy objectives to enhance the efficiency and flexibility of spectrum use in the European Union. A key aspect of the programme is the establishment of an inventory of spectrum bands identifying the current use of spectrum together with an analysis of technology trends, future needs and spectrum-sharing opportunities. Through the use of spectrum bands, the Commission aims to identify inefficient spectrum allocations and to free up capacity for new (more economic and efficient) uses of such spectrum.

Law stated - 5 May 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

No. This is regulated by the EU member states themselves.

Law stated - 5 May 2025

Media plurality

26 | Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

Media pluralism is protected at the EU level as a part of the fundamental right to information and freedom of expression, which is stipulated in article 11 of the EU Charter of Fundamental Rights and article 10 of the European Convention of Human Rights. Also, article 30 of the AVMS Directive assumed the independence of audiovisual media regulators. However, under the AVMS Directive, there were no clear and enforceable safeguards available to ensure the independence of regulators.

In October 2011, the Commission appointed a high-level expert group on media pluralism and freedom to provide recommendations on media plurality. The Commission also established the Centre for Media Pluralism and Media Freedom (CMPF). The CMPF's objective is to accompany the process of EU integration regarding media pluralism and to develop policy reports on EU competencies in this area.

In 2013, the CMPF conducted a pilot test implementation of the Media Pluralism Monitor Tool (MPM Tool). The MPM Tool was to identify potential risks to media pluralism in the European Union and provide support to policy and rulemaking processes. On 30 June 2014, the Commission adopted the Work Programme for 'Measures concerning the digital

content and audiovisual and other media industries' and related pilot projects in the field of media pluralism and freedom to finance the implementation of the MPM Tool.

In 2016, an examination of the 28 EU member states, as well as two candidate countries, was carried out via the MPM Tool. The result showed that none of these countries was free from risks relating to media pluralism and media freedom. It also showed the erosion of freedom of expression and protection for journalists in one-third of the countries. The key findings of the examination were the following:

- high concentration of media ownership with a significant barrier to a diversity of information and viewpoints represented in media content as a result;
- lack of transparency of media ownership, which makes it difficult for the public to understand the biases in media content;
- media authorities in many countries were under strong political pressure, particularly concerning appointment procedures and the composition of authorities;
- underdeveloped media literacy policy;
- lack of adequate access to media; and
- underrepresentation of women in media.

In November 2016, the Commission organised a colloquium on funda mental rights focusing on media pluralism and democracy, including topics such as:

- how to protect and promote media freedom and independence from state intervention or undue political or commercial pressures;
- how to empower journalists and protect them from threats of phys ical violence or hate speech; and
- the role of media and ethical journalism in promoting fundamental rights.

On 16 September 2021, the Commission published the Commission Recommendation on ensuring the protection, safety and empowerment of journalists and other media professionals in the European Union. EU member states are expected to ensure full implementation of the European and national legal frameworks on confidentiality of communications and online privacy with a view to ensuring that journalists and other media professionals are not subject to illegal online tracking or surveillance.

Having passed relatively swiftly through the legislative process compared to other EU legal acts in just under 15 months after its proposal, the EMFA entered into force on 1 May 2024. Its rules are set explicitly to protect media pluralism and independence in the EU. The Regulation includes, among others, safeguards against political interference in editorial decisions and against surveillance. It puts focus on the independence and stable funding of public service media as well on the transparency of media ownership and of the allocation of state advertising. The newly set up European Board of Media Services plays an important role in protecting media pluralism, as it is able to issue opinions on national measures and decisions affecting the media market and media market concentrations as well as coordinate national regulatory measures regarding non-EU media that present a risk to public security. The Board will also organise a structured dialogue between very large online platforms and the media sector.

Law stated - 5 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

Even though the initial proposal for the EMFA was met with doubts concerning the competence of the EU to regulate media services in such broad manner under the single market harmonisation clause, the final text of EMFA can certainly be regarded as the beginning of a new era of media regulation by the EU. In times of disinformation and political interference in media the EMFA is also a political message of the EU towards safeguarding media freedom and media pluralism in the EU internal market. The EU remains active in its regulatory activities concerning the media sector.

Law stated - 5 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The responsible administrative body for telecoms and media policy at the EU level is the European Commission (the Commission). It is also responsible for the enforcement of EU competition law and EU competition policy.

Within the Commission, the following bodies are relevant for the communications and media sectors:

- the Directorate-General for Communications Networks, Content and Technology (DG Connect): responsible for carrying out and developing the Commission's Digital Single Market Strategy (including policies on the digital economy and media) and for supervising and monitoring the implementation of the EU telecoms and broadcasting regulations in the EU member states;
- the Directorate-General for Competition (DG Comp): responsible for the application and enforcement of EU competition law in the area of telecoms and broadcasting at the EU level;
- the Directorate-General for Internal Market, Industry, Entrepreneurship and Small and Medium-sized Enterprises (DG GROW): responsible for ensuring an open internal market for goods and services in the European Union, in particular relating to electronic and online commerce;
-

the Directorate-General for Justice and Consumers: (DG JUST) responsible for EU policy on justice, fundamental rights and consumers, including the protection of EU citizens' personal data anywhere in the European Union and other data protection policies at the EU level; and

- the Directorate-General for Communication (DG COMM): responsible for informing the public about EU policies as well as political developments and trends in public opinion and the media.

The Commission's Directorate-Generals cooperate with each other. DG Comp will, in particular, consult the other Directorate Generals if the telecommunications, media or data protection sector is involved, before adopting a decision in a competition law case. DG Comp and DG Connect cooperate, in particular, in developing specific policies that may have an impact on competition law in the telecommunications or media sectors.

There are several other competent EU bodies and committees within the field of communications and media at the EU level, including, in particular, the following:

- the Body of European Regulators for Electronic Communications (BEREC): comprising the heads of the national regulatory authorities within the European Union and is responsible for the promotion of greater coordination and coherence between the national authori ties regarding the establishment and regulation of the electronic communications market within the European Union;
- the Communications Committee (COCOM): comprising representatives of the EU member states and responsible for the provision of opin ions on draft measures of the Commission, in particular regarding the regulation of roaming and notification obligations for personal data breaches;
- the Radio Spectrum Committee (RSC): comprising EU member-state representatives and responsible for the harmonisation of the use of radio spectrum at the EU level, in particular, advice on the specific technical measures required to implement the EU Radio Spectrum Policy;
- the European Union Agency for Cybersecurity (ENISA): assists the Commission and the EU member states in meeting the require ments of network and information security;
- the Radio Spectrum Policy Group (RSPG): comprising governmental offi cials and experts in the field of radio spectrum regulation and assisting the Commission in the development of radio spectrum policy at the EU level;
- the European Regulators Group for Audiovisual Media Services (ERGA): while cooperation between EU national supervisory authorities in the broadcasting sector has constantly increased since 2000, the resulting structures were formalised by Directive 2018/1808 (AVMS Directive 2.0). ERGA essentially operates as a consulting organ of the Commission but is replaced by a new European board for Media Services established by the European Media Freedom Act; and
- the newly established European AI Office: coordinates and coordinates the implementation of the Artificial Intelligence Act (AI A) in all member states and oversees compliance with the rules of the AIA.

As far as regulatory supervision of the broadcasting sector is concerned, AVMS Directive 2.0 introduced requirements on the independence of national regulatory authorities. These obliged EU member states to ensure that such authorities are legally distinct, functionally independent and remain free from any undue instructions of their governments and any other public or private body. EU member states shall also oblige their national regulatory authorities to exercise their powers impartially, transparently and in a manner fostering media pluralism, cultural and linguistic diversity, consumer protection, accessibility, non-discrimination, as well as fair competition and functioning of the internal market. Finally, national regulatory authorities must be adequately funded to carry out their functions (including contributing to the work of the ERGA) effectively.

To ensure EU-wide consistent application of its regulations, Directive 2010/13/EU (Audiovisual Media Services Directive) (AVMS Directive) provides for information obligations of its EU member states (towards each other as well as the Commission) regarding any informa tion required for the application of this Directive. AVMS Directive 2.0 has reinforced these obligations as follows:

> any media services to be wholly or mostly directed at the audience of another member state shall be notified between informed and concerned national regulatory authorities, and the former shall assist the latter on information gathering on such service providers' activities.

Law stated - 5 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

Any EU member state, the European Parliament or the Council can appeal decisions of the Commission to the General Court of the European Union on points of law or fact, article 263, paragraphs 1 and 2 of the Treaty on the Functioning of the European Union (TFEU). A further appeal on points of law can be made to the Court of Justice of the European Union. Natural or legal persons are only entitled to challenge a decision of the Commission if such decision is either addressed to that person or of direct and individual concern to that person, article 263, paragraph 4 of the TFEU. Natural or legal persons are also entitled to challenge an EU regulatory act, if such act is of direct concern to them and does not require its transposition into national law by the EU member states.

Concerning decisions of the national regulatory authorities, EU law obliges the EU member states to provide effective appeal mechanisms to challenge such decisions under their jurisdictions. According to AVMS Directive 2.0, however, any such appeal shall normally not suspend the enforceability of the contested regulatory decision; such effect shall only be granted if the plaintiff also seeks interim measures according to applicable national laws.

Law stated - 5 May 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

Legislative changes and trends

Over the course of the last few years, the European Union has been rather active in the regulatory sphere affecting competition law. The most important and impactful new pieces of related legislation on the intersection between competition law and the telecommunications and media sectors are:

- Regulation (EU) 2022/1925 (Digital Markets Act) (the DMA);
- Regulation (EU) 2023/2854 (the Data Act);
- Regulation (EU) 2024/1309 (the Gigabit Infrastructure Act);
- the proposal for a Regulation on standard essential patents; and
- the proposal for a Regulation on the screening of foreign investments and repealing Regulation (EU) 2019/452.

The DMA entered into force on 12 October 2022, and its rules generally will start applying from 2 May 2023.

The DMA is a novel form of regulation that is specifically intended to promote the contestability and fairness of digital platform markets in addition to and alongside competition law enforcement. The DMA is intended to limit the market power of large platforms and create standardised framework conditions across Europe. The DMA imposes a series of behavioural obligations on 'gatekeepers'. Gatekeepers are large digital companies that exceed certain turnover and (or) user thresholds and hold a strong economic position with a significant impact on the internal market and operate at least one of the legally defined platform services, which include search engines, video platforms and advertising networks. The largest tech companies such as Alphabet, Amazon, Apple, ByteDance, Meta and Microsoft have been designated as gatekeepers. Samsung, on the other hand, escaped being designated a gatekeeper. Some of the obligations gatekeepers will need to adhere to are particularly relevant to telecommunications and media companies that depend on these tech companies. For instance, a gatekeeper supplying online advertising services is obligated to provide, upon request and free of charge, each of its customers who are publishers with certain daily information concerning the advertisement displayed on the publisher's inventory. The obligations of gatekeepers include enabling third parties to cooperate with the gatekeeper's own services or enabling their business users to access data that they generate when using the gatekeeper platform. Following the designation, the Commission gave the gatekeepers a deadline of 6 March 2024 to comply with the requirements of the DMA.

The Data Act entered into force on 11 January 2024 and will be fully applicable from 12 September 2025. The Data Act aims to remove barriers to access to data and incentivise investment in data generation. The Data Act is intended to enable a fair distribution of data by establishing clear and fair rules. The Act introduces rules on who can use and

access data generated in the European Union in all sectors of the economy. The rights to access and use data generated in the European Union are defined in all sectors of the economy and the exchange of data, especially machine-generated data, is facilitated. The Data Act obliges manufacturers and service providers to provide access to and re-use the data generated by their products and services. In relation to connected devices, the Data Act aims to introduce data access or data sharing rights that are similar to current access claims based on competition law but without the requirement of a dominant position. The key area is therefore to grant users or third parties designated by them cross-sector access to data generated by their networked products and associated services. Users should have control over data generated by internet-of-things products. The General Data Protection Regulation remains fully applicable alongside the Data Act.

The Gigabit Infrastructure Act will be fully applicable from November 2025.The Act aims to establish rules for faster, cheaper, and simpler roll-out of Gigabit networks installations. The Act introduces as measures to enhance the efficiency of network deployment: (1) shared infrastructure use (such as ducts and poles) to optimise resources and cut costs; (2) coordination of work allowing telecom operators to work alongside public works projects to install fibre optic cables concurrently, minimising disruptions and speeding up broadband expansion; (3) simplifying administrative procedures; and (4) encouraging the installation of high-speed ready infrastructure in buildings and ensuring access to facilitate broadband deployment and uptake. The Gigabit Infrastructure Act creates access claims based on FRAND (fair, reasonable, and non-discriminatory) terms which are modelled to some extent after access claims in competition law.

In recent years, the Commission has been eyeing patent licensing practices as part of its standard essential patents (SEPs) initiative. SEPs are patents covering features of technical standards, such as the cellular standard 5G or the High Efficiency Video Coding video compression standard. A SEP must necessarily be used or infringed by companies wishing to implement such standards in their products. The implementer of a standard needs to seek licences from all SEP holders. SEP licensing negotiations between patent holders and implementers are often criticised for their lack of transparency and the unequal access to relevant information among the parties. The Commission published its proposal for a Regulation on standard essential patents to address certain topics, for example, by creating a competence centre for SEPs within the European Union Intellectual Property Office (EUIPO). However, the Commission has withdrawn the proposal in early 2025 as there was no foreseeable political agreement on the draft.

The Commission published a proposal to repeal its Foreign Direct Investment Screening Regulation (Regulation (EU) 2019/452). The Commission's proposal aims at ensuring that all member states have a screening mechanism in place, with better harmonised national rules, identifying minimum sectoral scope where all member states must screen foreign investments as well as extending the EU screening to investments by EU investors that are ultimately controlled by individuals or businesses from a non-EU country. With regard to the sectors that should come under scrutiny, the Commission's proposal includes critical infrastructure, critical technologies and also the freedom and pluralism of the media, among others.

In 2024, the Commission published a new notice on the definition of markets (C/2024/1645) which provides detailed insight to defining the market for digital products, namely multi-sided markets, and which tools the Commission may use, including the SSNDQ

(small but significant non-transitory decrease of quality) test which the General Court accepted in the Google Android case (T 604/18). The market definition notice is highly influential in approaching competition cases ranging from cartel cases, dominance cases and merger control issues.

Merger and antitrust decisions

The decisional practices also mirror the uptake of regulatory topics. Meta and Apple have been fined €200 million and €500 million, respectively, by the Commission for non-compliance with the DMA. Meta has been found to breach the obligation to give consumers the choice of a service that uses less of their personal data rules (the consent and pay model), while Apple has been found to breach the anti-steering obligation under the DMA.

Under the DMA, designated gatekeepers are also required to notify transactions to the regulator. In the last year, various transactions were notified to the Commission: Apple reported the acquisition of the Drishti assets, Apple notified the Darwin AI takeover, Apple notified the takeover of Datakalab, Alphabet reported the acquisition of Galileo AI and Amazon notified the acquisition of Perceive.

The General Court (T-692/20) rejected a challenge to the Commission's approval of the joint venture between Vodafone and Telecom Italia and the remedies accepted. The General Court stated that the Commission can use general terms when accepting remedies and does not have to spell out all technical details.

In the antitrust sphere, there were again notable decisions by the Commission or the EU courts, which include, among others:

- On 4 March 2024, the Commission fined Apple over €1.8 billion for abusing its dominant position on the market for the distribution of music streaming apps to iPhone and iPad users through its App Store. The Commission found that Apple applied restrictions on app developers that prevented the developers from informing users about alternative and cheaper music subscription services. The Commission found these restrictions to amount to anti-steering provisions, which are illegal under EU competition law. Apple has already appealed the fine.
- The General Court (T-671/19) largely upheld the fine imposed on Qualcomm and rejected the annulment of the Commission decision finding that Qualcomm had engaged in predatory pricing of its mobile chipsets by supplying certain quantities of some of its UMTS chipsets below cost prices, with the intention of eliminating its main competitor.
- The Court of Justice of the European Union (CJEU) clarified in its *Android Auto* decision (C 233/23) when the so-called Bronner criteria (C-7/97) do not apply and a dominant undertaking, namely in relation to platforms, that develops an infrastructure with a view to that infrastructure being able to be used by third-parties, must allow access to such infrastructure if third parties demand access which could make their own service more attractive.
- In *Google Shopping* (C-48/22 P), the CJEU upheld the fine of €2.4 billion imposed on Google for abuse of its dominant position by favouring its own comparison

shopping service. The court addressed the issue of self-preferencing which is also subject to the obligations under the DMA. The CJEU clarified that is not a general rule under competition law that a dominant undertaking which favours its own products or services is engaging in conduct which departs from competition on the merits irrespective of the circumstances of the case. Rather this is a case- specific assessment.

Law stated - 5 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The Department of the Environment, Climate and Communications (DECC) is the relevant governmental department responsible for the telecoms sector and the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media is responsible for the media sector. The telecommunications regulator is the Commission for Communications Regulation (ComReg).

Ireland has implemented the EU regulatory framework governing the electronic communications sector by way of primary and secondary legislation. Primary legislation consists of the Communications Regulation Acts 2002–2023. Secondary legislation currently consists namely of:

- the European Communities (Electronic Communications Networks and Services) (Privacy and Electronic Communications) Regulations 2011 (SI 336/2011) (the Privacy Regulations);
- the Communications Regulation and Digital Hub Development Agency (Amendment) Act 2023 (the Act);
- the European Union (Electronic Communications Code) Regulations 2022 (SI 444/2022) (the ECC Regulations);
- the European Communities (Electronic Communications Networks and Services) (Privacy and Electronic Communications) (Amendment) Regulations 2023 (SI305/2023);
- the European Union (Electronic Communications Code) (Public Warning System) Regulations 2023 (SI 583/2023); and
- the European Union (Electronic Communications Code) (Amendment) Regulations 2023 (SI 300/2023).

The Screening of Third Country Transactions Act 2023 commenced on 6 January 2025. This Act implements the EU Screening Regulation and ensures all EU member states have the legal tools to screen investments by non-EU or EEA undertakings and individuals of certain key infrastructure assets with an Irish nexus, in particular concerning foreign investments into critical utilities and infrastructure sectors, high-tech and personal data focused businesses, and media businesses.

Law stated - 22 April 2025

Authorisation/licensing regime

2 Describe the authorisation or licensing regime.

The provision of communications services is currently subject to the regime set out in the ECC Regulations, which confers a general right to provide an electronic communications network (ECN) or an electronic communications service (ECS) (or both) provided certain conditions are complied with. No distinction is made as to the type of network or service (eg, mobile, fixed (including public Wi-Fi) or satellite).

The notification procedure for obtaining a general authorisation can be completed on the ComReg online portal (Electronic Register of Authorised Undertakings (ERAU)). Operators are free to commence operations once a properly and fully completed notification has been received by ComReg. It is envisaged that ComReg will assess all notifications, before sending out confirmation of authorisation within seven working days. Notwithstanding that any registered services will automatically be listed on the ERAU on ComReg's website, a notifying party is, however, immediately subject to the Irish regulatory regime and the conditions set out in the general authorisation. Conditions that may be attached to a general authorisation are set out in Schedule 1 to the ECC Regulations. ComReg has also produced a document identifying the conditions of a General Authorisation, which outlines the conditions for the provision of ECN and ECS, before registering with ComReg.

General Authorisations are unlimited in duration. No fee is payable on notification; however, an annual levy (0.2 per cent of relevant turnover) is payable where an operator's relevant turnover (namely, relating to the service or network) in Ireland in the relevant financial year is €500,000 or more.

The ECC Regulations as transposed also govern the granting of rights of use for numbers and radio spectrum. Following its introduction into Irish law, ComReg revised the numbering conditions of use and application process, and published updated guidance to incorporate the changes made by the ECC Regulations.

Fixed and mobile service providers may also need to obtain a licence under the Wireless Telegraphy Act 1926 (as amended) (Wireless Telegraphy Act) in connection with the use of wireless telegraphy apparatus. Non-compliance with the Wireless Telegraphy Act can be prosecuted by ComReg.

Law stated - 22 April 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

The legal framework controls ComReg's management of the radio frequency spectrum in Ireland. ComReg issues licences on a technology and service-neutral basis (eg, the 'liberalised use' licences issued following a spectrum auction were issued 'to keep and have possession of apparatus for wireless telegraphy for terrestrial systems capable of providing Electronic Communications Services'). ComReg considers that spectrum trading is a spectrum management tool that, along with other measures, can increase the efficient use of spectrum rights.

However, ComReg may, through licence conditions or otherwise, provide for proportionate and non-discriminatory restrictions to the types of radio network or wireless access

technology used for ECS where this is necessary (eg, to avoid harmful interference and safeguard the efficient use of spectrum, etc).

ComReg has published regulations (the Wireless Telegraphy (Transfer of Spectrum Rights of Use) Regulations 2014 (SI 34/2014)) and guidelines for spectrum trading in the Radio Spectrum Policy Programme (RSPP) bands and is prioritising the setting out of a spectrum leasing framework for the RSPP bands a priority action as part of its Strategy Statement. ComReg has imposed an ex-ante regime for reviewing notified spectrum transfers to determine whether such transfers would distort competition in the market. Where the transfer forms part of a wider transaction that is subject to merger control scrutiny by the Irish Competition and Consumer Protection Commission (CCPC) or by the European Commission, the framework and guidelines will not apply and the appropriate competition body will be the sole decision-making body. ComReg must be informed of any such merger or acquisition at the same time it is notified to the relevant competition body. The framework and guidelines deal solely with spectrum trading; ComReg has indicated that it will deal with spectrum leasing and sharing or pooling on a case-by-case basis pending further consideration of the same.

ComReg has also published its Framework for Spectrum Leases in Ireland concerning:

- transfer of spectrum regime under the EU Spectrum Transfer Framework and implementing Irish legislation;
- the scope of the proposed Spectrum Lease Framework (noting the difference between a spectrum lease or transfer);
- the procedural framework for spectrum leasing; and
- how ComReg intends to grant and issue a spectrum lease licence.

ComReg published a decision in December 2020 concerning a significant release of spectrum (known as a multi-band spectrum auction) concerning the 700MHz, 1.4GHz, 2.3GHz and 3.6GHz bands. This decision outlines the award or auction process for the release of licences in these bands and licence conditions for spectrum in these bands (eg, roll-out obligations). This decision was appealed by one operator, Three Ireland, on various grounds. In December 2022, Three Ireland withdrew its appeal.

In May 2021, ComReg initiated the application process for the award of multi-band spectrum in respect of the 700MHz duplex, 2.1GHz, 2.3GHz and 2.6GHz bands. In June 2021, ComReg awarded a 2.1GHz Band Liberalised Use Licence to both Three Ireland and Vodafone.

ComReg (following consent of the Minister for Environment, Climate and Communications) also adopted the following regulations in May of 2021:

- the Wireless Telegraphy (Liberalised Use and Related Licences in the 700 MHz Duplex, 2.1 GHz, 2.3 GHz and 2.6 GHz Bands) Regulations 2021 (SI 264/2021): these regulations are applicable to the grant of new rights of use for the Award Spectrum; and
- the Wireless Telegraphy (Third Generation and GSM Licence (Amendment) and Interim Licensing) Regulations 2021 (SI 265/2021): these regulations give effect to ComReg's decisions for the liberalisation of existing 2.1GHz rights of use, and the

grant of interim 2.1GHz rights of use to Three Ireland in respect of the Multi Band Spectrum Award.

ComReg, in September 2022 (following consent of the Minister for Environment, Climate and Communications), also adopted the Wireless Telegraphy (Liberalised Use and Related Licences in the 700 MHz Duplex, 2.1 GHz, 2.3 GHz and 2.6 GHz Bands) (Amendment) Regulations 2022 (SI 483/2022). These Regulations prescribe matters in relation to the amendment of the commencement date of MBSA2 Liberalised Use Licences granted in the 2.1GHz Band under previous 2021 Regulations.

Multi Band Spectrum Award 2022

On 14 December 2022, the main stage of the Multi Band Spectrum Award (MBSA2) process concluded with the identification of four winning bidders paying about €448 million to the state for the issue of long-term spectrum rights, until 13 February 2042, in the 700MHz, 2.1GHz, 2.3GHz and 2.6GHz bands (see for reference Document 22/105). The four winning bidders were Imagine, Eir, Three and Vodafone.

On 12 January 2023, the specific frequency locations to be assigned to each of the winning bidders were determined (see for reference Document 23/06).

On 19 January 2023, following the submission of complete applications, an MBSA2 Liberalised Use Licence was issued to each winning bidder with a commencement date of 20 January 2023.

Since 2 April 2023, all MBSA2 spectrum rights have commenced:

- spectrum rights in the 2.3GHz and 2.6GHz bands commenced on 20 January 2023; and
- spectrum rights in the 700MHz and 2.1GHz bands commenced between 26 January 2023 and 2 April 2023.

The MBSA2 spectrum rights are ideal for the provision of new 5G services, as well as the advancement of other fixed and mobile wireless broadband services, such as 4G (long-term evolution) or fixed-wireless access services.

Law stated - 22 April 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Fixed communications

Wholesale local access (provided at a fixed location)

Eir has been designated with significant market power (SMP) in the Commercial Next Generation (Commercial Next Generation (NG) whole local access (WLA) market (but not in the Current Generation WLA (CG WLA) or the Intervention Area Next Generation WLA (IA NG WLA)) and the remedies imposed on Eir include access, transparency, non-discrimination, accounting separation, regulatory governance, price control and cost-accounting obligations.

Wholesale leased line

Eir has been designated with SMP in the Low Bandwidth (LB) Traditional Interface (TI) Wholesale High Quality Access (WHQA) markets and Zone B Modern Interface (MI) WHQA. However, ComReg only imposed remedies on Eir in relation to Zone B MI WHQA and only one LB TI WHQA leased line. These remedies include access, transparency, non-discrimination, accounting separation, price control and cost-accounting obligations.

Physical infrastructure access

Eir has been designated with SMP in this market and the remedies imposed on Eir include access, transparency, non-discrimination, accounting separation, regulatory governance, price control and cost accounting obligations.

Removal of ex-ante regulation from Relevant Termination Markets

On 29 June 2022, ComReg published its decision to withdraw Eir's SMP designation and the remedies imposed in the retail access to the public telephone network at a fixed location markets effective as of the decision date and also the wholesale call origination on the public telephone network provided at fixed-location markets subject to a sunset period to permit the transition to the new market.

In February 2023, pursuant to Regulation 27(1) of the European Communities (Electronic Communications Networks and Services) (Framework) Regulations 2011 (SI 333/2011) (which have since been revoked by the ECC Regulations), ComReg consulted the CCPC with respect to ComReg's proposed draft measures arising from its Response Consultation and Decision that analyses the wholesale markets for Fixed Voice Call Termination and Mobile Voice Call Termination markets (together, the Relevant Termination Markets) in the state.

On the basis of the facts and analysis presented by ComReg, the CCPC did not object to ComReg's:

- conclusion that the Relevant Termination Markets are no longer susceptible to ex-ante regulation; and
- decision to withdraw all existing SMP designations and obligations in respect of these markets.

The CCPC did also not object to ComReg's proposal to impose a six-month sunset period on Eir in respect of the withdrawal of the existing SMP-based interconnection obligations to provide certainty to other service providers and allow them time to make alternative operational interconnection arrangements should they be required.

In January 2024, Eir's designation with SMP in the CG WLA market, the IA NG WLA market and the wholesale central access (WCA) (provided at a fixed location for mass-market products) market were removed. In reaching this decision, ComReg determined that moving forward the NG WLA will be sufficiently competitive across Ireland without the imposition of ex-ante obligations on service providers. Regarding the IA NG WLA market, ComReg was of the opinion that the market, within the next five years, will likely be in a position where no service provider has SMP, and that the contract between the state and National Broadband Ireland regarding the National Broadband Plan would prevent service providers from exercising SMP. Accordingly, ComReg did not consider it necessary for the market to be subject to ex-ante regulations. Concerning the WCA market, ComReg held there to be insufficient evidence to warrant the continued regulation of the market and subsequently, withdrew the ex-ante regulations.

The removal of ex-ante regulation where same is no longer applicable or warranted is a continuing area of focus for ComReg. In its Electronic Communications Strategy Statement: 2023–2025, it notes that:

> the more densely populated regions of Ireland have benefited from investment in networks driven by competitive forces, resulting in these areas being well-served by ECN. In some of these well-served areas. competitive forces may be strong enough such that ex-ante regulatory intervention is no longer required.

Law stated - 22 April 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

Structural separation has not been provided for in the Irish communications regulatory framework. Structural separation can be imposed under the Competition Acts 2002–2022 as a remedy in cases entailing an abuse of dominance contrary to section 5 of the Competition Acts 2002–2022.

Functional separation powers do exist as an exceptional remedy in respect of vertically integrated operators with SMP under the regulatory framework, in circumstances where ComReg concludes that:

- transparency, non-discrimination, accounting separation, access and price-control obligations have failed to achieve effective competition; and
- where it has identified important and persisting competition problems or market failures concerning the wholesale provision of certain access markets.

Following a settlement agreement between Eir and ComReg (signed on 10 December 2018), Eir imposed a revised regulatory governance model to separate its retail and

wholesale arms (with independent observers monitoring such a separation for a five-year period). This agreement ended in June 2024.

Law stated - 22 April 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

Eir was designated as the universal service provider (USP) for telephony services in 2006. However, in December 2023, ComReg published a decision (D10/23) in which it determined that fixed communications services could not be ensured under normal commercial circumstances in Ireland. Consequently, there is currently no USP.

Prior to ComReg's 2023 decision above, numerous universal service obligations (USO) were imposed on Eir as the state's USP. These included:

- Eir must satisfy any reasonable request to provide, at a fixed location, connections to the public telephone network and access to a publicly available telephone service (PATS);
- the maintenance of the National Directory Database (NDD) is no longer a USP obligation;
- an accessibility statement being published to ensure equivalence in access and choice for disabled end users is now an obligation of all undertakings and the provision of specialised terminal equipment for disabled end users is no longer an obligation of the USP or any undertaking since 1 January 2016; and
- Eir must adhere to the principle of maintaining affordability for universal services.

In December 2018, ComReg decided that PortingXS (a Dutch company) would be responsible for the management and maintenance of the NDD from 1 July 2019, after the expiry of the transition period to allow the transfer of functions from Eir. As such, PortingXS must ensure that a comprehensive record exists of all subscribers of publicly available telephone services in the state, excluding those who have refused to have their details included in the NDD. In August 2015, ComReg specified certain requirements to be complied with by all undertakings to ensure equivalence in access and choice for disabled end users (previously, only Eir as the USP had obligations in respect of a Code of Practice concerning the provision of services for people with disabilities).

In February 2024, ComReg requested undertakings to express their interest to assume responsibility for managing and maintaining the NDD after 30 June 2024 (when ComReg's agreement with PortingXS expires). At the time of writing, the consultation has closed and ComReg have yet to issue a final decision.

Previously, Eir was subject to legally binding performance targets relating to timescales for connection, fault-rate occurrence and fault repair times. ComReg issued quarterly reports detailing Eir's performance data covering its legally binding and non-legally binding performance targets.

There is currently no USO fund in Ireland. Eir, when it was designated as the USP, could have applied to receive funding for the net cost (if any) of meeting the USO where ComReg determined there was a net cost and that it represented an unfair burden. Litigation was brought before the Irish courts following ComReg's rejection of Eir's application for funding and a reference was made in May 2021 to the Court of Justice of the EU (CJEU) on certain aspects of this case including the fairness of USO burden on Eir. The CJEU held that in determining whether a provider is unfairly burdened by the costs of undertaking its universal service obligations, regulators must consider the provider's situation proportionate to the position of its competitors. In July 2023, proceedings were settled between the parties.

On 7 April 2017, ComReg published the outcome of its assessment of Eir's 2015 compliance with the annual performance targets set out in Performance Improvement Programme 3 (PIP3). Eir submitted a force-majeure claim in June 2016 and sought relief in respect of fault repair time performance only. The submission set out the basis for Eir's force majeure claim as being the 'exceptional weather events in January, November and December 2015'. Also, Eir submitted an expert report on the weather conditions associated with the force-majeure claim. In response, ComReg formed the view that it could be considered that force-majeure conditions applied in December 2015 but that the January and November 2015 weather events did not constitute force-majeure events within the meaning of PIP3. Eir paid ComReg a penalty of €3.094 million in December 2016 for its failure to meet the PIP3 agreed USO quality of service performance targets for 2015. In light of this, ComReg does not intend to take further enforcement action against Eir for the 2015 period. In January 2017, ComReg imposed a 48-hour deadline on Eir to repair faults in its telecoms lines (pursuant to complaints from Eir's competitors). In March 2017, Eir initiated High Court proceedings against ComReg concerning fault repair time obligations imposed on Eir.

In June 2017, ComReg applied to the High Court for declarations of non-compliance concerning Eir's transparency, non-discrimination and access obligations to provide access to its network to other operators, seeking a financial penalty of close to €10 million (which would have been the largest in the state) concerning these regulatory breaches. In June 2017, Eir launched counter proceedings against the Minister for Communications, Climate Action and Environment (now the Minister for the Environment, Climate and Communications) claiming the EU telecoms regulations have been wrongly applied in Ireland (the Access Regulations) and that ComReg has overstepped its remit in trying to impose civil penalties 'of the kind it is proposing under existing law'. In December 2018, Eir agreed to pay €3 million to ComReg to settle these enforcement proceedings. As part of the settlement deal, Eir also consented to allow independent observers to monitor its internal divisions between its wholesale and retail structures. In February 2020, ComReg published an update on the progress of the commitments under its settlement agreement with Eir. The set of commitments, when fully implemented, will result in the establishment and operation of an enhanced regulatory governance model in Eir. Completion of the commitments is underpinned by €9 million held in escrow that is partially released to Eir on completion of commitments milestones.

In July 2016, ComReg designated Eir as the USP for access at a fixed location (AFL USO) for a period of five years, which designation remained in full force and effect until 30 June 2021. Pursuant to ComReg Decision D05/21, this time frame was extended to 30 October 2021. Notwithstanding the fact Eir appealed to the Irish High Court against ComReg's

decision to extend the designated period, on 5 November 2021, ComReg published a decision (21/112R) in respect of Universal Service Requirements regarding the Provision of AFL USO. As part of this decision, Eir was designated as the USP of AFL USO in Ireland from 31 October 2021 until 30 June 2023. In addition to this, the Reasonable Access Request process and the threshold has been amended to include, inter alia, the following:

- the new connections and (or) PATS obligation is now amended;
- the initial cost threshold of €1,000 is now removed;
- the automatic USP obligation to supply all reasonable access requests costing under €1,000, irrespective of whether there is an alternative infrastructure and an equivalent service available, is now removed;
- Eir now has an obligation to supply reasonable access requests where there is no alternative infrastructure and equivalent service available; and
- the 'equivalent service' definition is now amended to include voice and broadband services supplied in a bundle, providing the bundle meets certain existing criteria, including affordability.

At the time of writing, ComReg is consulting with the Minister of the Environment, Climate and Communications to determine whether other public policy tools could be used to ensure access to voice communications services in Ireland.

Law stated - 22 April 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

All operators providing a PATS must provide number portability to subscribers at no direct charge. Operators must ensure that the porting of numbers is carried out within the shortest possible time; numbers must be activated within one working day and loss of service during the process may not exceed one working day. ComReg may specify the payment of compensation to subscribers for delays in porting.

ComReg has confirmed as part of 2013 and 2017 decisions on machine-to-machine numbering, that number portability is in principle an entitlement of machine-to-machine number holders.

ComReg is tasked with the management of the National Numbering Scheme, including attaching conditions to rights of use for numbers and generally makes allocations and reservations of numbering capacity from the scheme to notified network operators, who each sub-allocate individual numbers to service providers and end users. ComReg's tasks include:

- assigning numbers for existing services;
- developing frameworks for new and innovative services;
-

ensuring numbers are used following conditions of use set out in the Numbering Conditions of Use; and

- monitoring number utilisation and implementing number changes when required.

Applications for allocation are made via an application form and numbers are granted on a first-come, first-served basis except when starting allocation from newly allocated number ranges. Allocation is carried out in an open, transparent and non-discriminatory manner. ComReg currently does not charge fees to recipients for allocations of numbers.

In December 2018, ComReg introduced measures regulating the costs of using non-geographic numbers. Since 1 December 2019, the cost of a call to a non-geographic number cannot exceed the cost of calling a landline number.

Since 1 January 2022, the number of non-geographic number (NGN) ranges available in Ireland has been reduced from five to two. The 1850, 1890 and 076 NGN ranges are no longer in service. 1800 freephone and 0818 standard rate NGNs remain in operation. These changes will simplify NGNs and provide clarity on the costs of calling the two remaining NGN ranges (1800 and 0818). For callers, 1800 calls are free. Calls to 0818 are included in customer call bundles that include calls to landlines or, out of bundle, charged at the standard rate, which is no more than the cost of calling a landline.

Notably, for organisations, the cost of maintaining 1800 numbers has reduced significantly since the introduction of new wholesale charges in 2020. In general, there is no per-call cost to an organisation for receiving an 0818 call.

Following a consultation in 2023, ComReg decided to extend the operation of Utility NGNs considering they were emergency-type numbers to allow the general public to fully transition to new numbers. As of 9 April 2024, all 1850, 1890 and 076 numbers should be withdrawn from service.

Law stated - 22 April 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Operators providing a publicly available ECN or ECS must provide certain standard contract conditions to consumers in a clear, comprehensive and easily accessible form (eg, details of price and tariffs and contract duration, etc). Operators must notify customers one month in advance of any proposed changes to their terms and conditions and of their right to withdraw without penalty if they do not accept the changes. Failure to do so may be prosecuted as a criminal matter as failure to comply is an offence. ComReg also has the choice of bringing a civil action for non-compliance to the High Court. ComReg has not specified a medium to be used for contract change notifications but provides that notifications must be presented to customers clearly, unambiguously and transparently, and must include certain minimum information.

Since its transposition into Irish law, the EECC has strengthened and harmonised consumer protection across the European Union. Telecoms operators are required to

implement a number of changes to give effect to the new end-user rights introduced in the EECC. These include, inter alia:

- developing pre-contract summary templates in line with the prescriptive guidelines set out in the EECC;
- building in the provision of best tariff advice and best tariff information into the contract process; and
- updating the scripts of the customer service representatives to comply with the obligations set out in the EECC in relation to cancellation, renewal and automatic prolongation of contracts.

ComReg has initiated enforcement actions regarding several alleged breaches of the rules and most recently issued notices of non-compliance against Eir, Vodafone Ireland, Virgin Media Ireland and Sky Ireland in 2018 for failure to notify customers in the prescribed manner as required under the Universal Service Regulations.

ComReg has also issued several requirements concerning bills and billing mediums. By way of example, consumers must have a choice about whether to receive paper bills or alternative billing mediums, and a paper bill must be provided free of charge where access to online billing is not possible.

ComReg's enforcement powers concerning consumer contracts derive from both the ECC Regulations and the Consumer Rights Act 2022. Consumer contract compliance continues to be a core focus of ComReg, and it has engaged in several enforcement actions against operators in recent years including the following examples.

In 2017, ComReg initiated an investigation into how Vodafone Ireland notified its customers of changes to their roaming terms and conditions (to include an automatic opt-in provision). ComReg determined Vodafone Ireland incorrectly notified its customers of this change and imposed a fine of €250,000 and forced Vodafone Ireland to remediate its customers to the tune of €2.5 million. Vodafone Ireland also made binding commitments not to use auto opt-ins in future.

In 2018, Sky Ireland made a settlement and paid ComReg €117,000 concerning an alleged failure to provide customers with a contract on a durable medium, and breaches of their right to a cooling-off period. As part of this settlement, Sky Ireland agreed to take remedial action to prevent any further breaches of these consumer obligations.

In 2018, ComReg brought proceedings against Yourtel concerning billing customers for a service that it was alleged was never received. In February 2019, Yourtel consented to orders before the Commercial Court requiring it to cease its contraventions (and has since been served with restraining orders to prevent it from doing so). In June 2018, Eir was fined €23,500 and received 10 separate criminal convictions concerning 10 counts of incorrect charging of customers for electronic communications services.

In 2019, the District Court heard a prosecution taken by ComReg against Pure Telecom Limited concerning Pure Telecom failing to provide full pricing information in its customer contracts. Pure Telecom pleaded guilty to the counts brought against it and in lieu of a conviction was required to make a charitable donation of €10,000. ComReg also found Vodafone Ireland was non-compliant because it did not provide customers of its 'Extra' Pay as You Go product with their contract on a durable medium, in contravention of

the Consumer Information Regulations. ComReg reached a settlement agreement with Vodafone Ireland that included an undertaking by Vodafone Ireland to refund 72,774 customers the sum of €416,971.79.

ComReg has brought cases in the Dublin District Court against Eir, Vodafone Ireland and Yourtel in recent years. In June 2018, Eir plead guilty to 10 offences concerning overcharging customers and paid a total of €23,500. Vodafone Ireland had the Probation Act applied to it on condition that it donates €7,500 to charity and Vodafone Ireland agreed to contribute to ComReg's costs of €15,000, and Yourtel pled guilty to failing to comply with a statutory request for information and was required to make a payment towards ComReg's costs (the *Yourtel* case related to an overcharging complaint). Following a further investigation, ComReg, since February 2019, applied for, and received, a restraining order concerning Yourtel and the overcharging of customers (as Yourtel had 89 prior convictions for such an offence).

In February 2020, Virgin Media Ireland entered into a settlement agreement with ComReg following a failure to comply with regulation 14 of the Universal Service Regulations. Virgin Media's non-compliance related to the manner in which tariffs associated with certain extra charges, for example, late payment fee and unpaid direct debit fee, were presented and subsequently charged by Virgin Media to portions of its customers. It concerned, in particular, the transparency and accessibility of the contractual provisions relating to those tariffs. Virgin Media agreed to refund the sum of €421,200 to approximately 24,000 customers who were charged all or any of the extra charges during the period from 1 September 2016 to 27 October 2017. In March 2020, Three Ireland paid ComReg a penalty of €51,000 after an investigation found that between July 2017 and November 2019, Three Ireland had failed to provide 57,147 of its 'affinity plan' customers who signed up via a sales agent with a contract on durable medium, contrary to Regulation 12 of the Consumer Information Regulations.

In May 2021, Tesco Mobile advised ComReg that 27,500 customers were impacted by the charging of Post Cancellation Charges to a value of €388,000. Tesco Mobile made a commitment to ComReg to refund all affected customers. Tesco Mobile's review of its billing system to determine whether its customers were being charged for services beyond the cancellation of their contracts came on foot of a December 2020 ComReg publication that detailed the outcome of a ComReg investigation into Virgin Media Ireland and its then-practice of charging customers beyond the cancellation of their contract for what was termed 'post cancellation charges'. ComReg secured a commitment from Virgin Media that it would provide accumulative refunds of approximately €3 million to all affected customers by 31 March 2021.

More recently, in August 2022, following an inquiry by ComReg, Vodafone has undertaken a review of its billing system to determine whether its customers were charged for services beyond the cancellation of their contracts, which are termed 'post cancellation charges'.

In February 2023, the Dublin District Court heard a case taken by ComReg against Kaleyra UK Ltd in relation to 22 counts of charging customers for premium-rate services in circumstances where they were not requested by the customer. Kaleyra pleaded guilty to 22 counts brought against it. The Dublin District Court applied the Probation of Offenders Act 1907 and required Kaleyra to make charitable donations in the total amount of €5,000, in addition to ComReg's costs.

In November 2018, ComReg announced Formal Dispute Resolution Procedures for End-Users of Electronic Communication Services and Networks, introducing structures and timelines for disputes concerning any regulations under which ComReg has the power to resolve disputes. These measures entered into force in September 2019. Formal Dispute Resolution Procedures apply to issues for end users of mobile phones, home phones and broadband whose complaints have been unresolved for 10-working days or more after lodging a complaint with a service provider. ComReg will adjudicate the dispute once the end user has applied for the service. The application procedure is set out in greater detail in ComReg's End-user Dispute Resolution Procedures (updated as of 16 December 2024), which reflects the amendments introduced by the Communications Regulation and Digital Hub Development Agency (Amendment) Act 2023.

Law stated - 22 April 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

The Telecom Single Market Regulation, effective in June 2017, laid down measures regarding open internet access and net neutrality. ComReg has stated that its approach to network neutrality will be informed by ongoing Body of European Regulators for Electronic Communications (BEREC) work.

BEREC published its Guidelines on Net Neutrality to National Regulatory Authorities (NRAs) on 30 August 2016, providing guidance for NRAs to take into account when implementing the rules and assessing specific cases. On 30 June 2020, ComReg published its 2020 Report on the Implementation of the Net Neutrality Regulations in Ireland (as obliged under Regulation (EU) 2015/2120 (the TSM Regulation) and outlined how ComReg would:

- safeguard open internet access;
- ensure transparency measures are in place for open internet access; and
- supervise and enforce breaches of the TSM Regulation and impose penalties for such breaches.

In its 2020 Report, ComReg found that having regard to the implementation of the Net Neutrality Regulation, it found no evidence for the existence of relevant zero-rated services in Ireland. This is in contrast to a similar report by ComReg from 2019 that stated that it was aware of zero-rating practices in Ireland. A 'zero-rating' practice typically involves an internet service provider (ISP) excluding the use of certain applications and services from customers' data consumption limits. From a competition perspective, zero rating raises a number of concerns as it allows ISPs to prioritise access to certain applications and (or) services. Thus, this may fall foul of article 3 of the Net Neutrality Regulations pursuant to the fact that ISPs may not limit end-users' access and distribution rights through agreements or commercial practices. This is important in the context of the recent decision regarding the CJEU joined cases of C-807/18 and C-39/19, *Telenor Magyarország Zrt v Nemzeti*

Média- és Hírközlési Hatóság Elnöke (15 September 2020) in which it was held that an internet package that included zero rating for certain applications and services, and allowed unrestricted access only to those services once a certain data volume had been exhausted, was liable to restrict the rights contained in article 3(1) of the Net Neutrality Regulation while also reducing the use of other applications and services.

It is noted that ISPs are permitted to put reasonable traffic management measures in place so long as they are transparent, non-discriminatory and proportionate, as well as being used as being based on technical requirements.

The European Union (Open Internet Access) Regulations 2019 (SI 343/2019) gives enforcement powers to ComReg concerning net neutrality. ComReg may give a direction to an undertaking requiring the undertaking to take a measure under article 5(1) of SI 343/2019. Where ComReg finds an undertaking has not complied with its direction or with the obligations under the Net Neutrality Regulations, and that the undertaking has not corrected its behaviour following a notification from ComReg, ComReg can seek an order from the High Court, which can include an order for payment of a financial penalty to ComReg.

In December 2019, ComReg issued notifications of non-compliance for breaches of net neutrality regulations to seven telecommunications companies operating in Ireland. The notifications were issued to internet access service providers regarding transparency breaches in their consumer contracts. With the recent expansion of its powers, ComReg has taken formal enforcement action against providers who appeared to have not been providing the required information in their customer contracts concerning net neutrality.

ComReg's 2020 Report notes that it devotes considerable resources to relevant BEREC workstreams related to net neutrality and to engage with its peer NRAs to ensure that its approach to net neutrality is consistent with that being taken by regulators across the European Union.

Law stated - 22 April 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

In addition to Part 8 of the Broadcasting Act 2009 (as amended by the Online Safety and Media Regulation Act 2022 (OSMR Act)), which provides for digital broadcasting and the associated migration from analogue television, there is limited regulation of digital platforms in Irish law.

Regulation (EU) 2019/1150 (the Platform to Business Regulations) came into force in Irish law in July 2020 and provides a framework to ensure a transparent and predictable business environment for smaller businesses and traders on online platforms and marketplaces. These rules apply to intermediation service providers and search engine providers and include rules concerning terms and conditions and equal treatment of products. These are enforced by the CCPC in Ireland.

To the extent that a digital platform provides an ECS or ECN (or both), it would be subject to the authorisation regime set out in the EECC Regulations, which confers a general right to provide ECN or ECS (or both) subject to certain conditions.

The OSMR Act transposes the revised Audiovisual Media Services Directive into Irish law, including the regulation of video-sharing platform services as part of the regulatory framework for online safety.

The Digital Services Act 2024 (the 2024 Act) transposes the Digital Services Act (Regulation (EU) 2022/2065) and has been in effect since 17 February 2024. The 2024 Act imposes greater obligations on online intermediaries' in relation to their screening of online content and advertisements.

Law stated - 22 April 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

In November 2018, ComReg issued a decision concluding that Eir continued to hold SMP in the wholesale broadband access market and, as such, imposed a series of remedies on Eir. Such remedies are designed to ensure telecoms operators have access to Eir's wholesale services, including the imposition of price control obligations concerning the fibre-to-the-cabinet wholesale market through a cost-orientation obligation. This decision was based on a market review carried out by ComReg examining the nature and structure of the wholesale broadband access markets.

Following a stakeholder consultation, the government approved plans for a new National Broadband Plan (NBP) that will provide the initial stimulus required to deliver high-speed broadband to every city, town, village and individual premises in Ireland. There were several delays in the design and procurement phases of the NBP owing to negotiations with another commercial provider (Eir) seeking to provide high-speed broadband to some of the areas originally designated under the NBP. One bidder, National Broadband Ireland (NBI), was selected as the preferred bidder to deliver the NBP project. On 22 February 2023, the NBI agreed its targets for the 2023 project year – and with that, NBI committed to delivering a cumulative target of reaching 185,000 premises by the end of January 2024. Current Chief Executive Officer Peter Hendrick noted when agreeing the 2023 targets that:

> The public can be reassured there is solid progress and real momentum in the rollout of this project now. Ultimately the NBP will make fibre broadband available to over 560,000 homes, farms and businesses. Nearly 120,000 premises are ready to connect to the network and we have over 30,000 live connections today.
>
> By the end of this year, the proportion of the overall rollout where connections will be available will increase to over one third, as 76,000 further premises

will be passed by the NBI fibre network. The number of premises where the fibre build will be completed will almost double over the course of 2023.

NBI recently announced in that it had surpassed their target of covering 185,000 premises by 31 January 2023, and had instead reached 216,898 premises with the network, which are now ready to connect. In November 2024, NBI announced that, by the end of 2025, it will have made high-speed fibre broadband available to over 420,000 premises (out of the 564,000 premises included in the NBP), with 310,676 premises already connected by November 2024.

The NBP follows several previous state-funded broadband schemes in operation in Ireland:

- the Metropolitan Area Networks Scheme, which aimed to create open-access fibre networks in more than 120 Irish towns for €170 million with support from EU structural funds;
- the National Broadband Scheme, operated by Three Ireland, provided mobile broadband to all premises in locations where no services were available or likely to be made available by the market (this contract expired in August 2014); and
- the Rural Broadband Scheme, which aimed to provide broadband to parts of Ireland where it was not commercially available and was designed to meet the needs of the last 1 per cent of the population not covered by any service.

Previous governments established the Mobile Phone and Broadband Taskforce to identify immediate solutions to broadband and mobile phone coverage deficits and to investigate how better services could be provided to consumers before the full build and rollout of the network planned under the NBP. The Taskforce published its report in 2017 outlining the issues considered and set out its recommendations and actions to alleviate barriers to mobile reception and broadband access, and the DECC publishes quarterly updates on how the recommendations are being implemented. While ComReg does not have direct responsibility for the implementation of the NBP, the Mobile Phone and Broadband Taskforce outlines several regulatory actions that can assist in the NBP rollout, and ComReg has announced it will undertake such action areas that support the Taskforce's objectives.

Separately to the NBP, in June 2018, ComReg decided to legalise some mobile phone repeaters in an attempt to boost the coverage of mobile phone services in respect of indoor reception. This was a key recommendation of the government's Mobile Phone and Broadband Taskforce. ComReg decided to make certain mobile phone repeaters licence-exempt provided certain technical conditions as outlined in the ComReg decision are met.

Law stated - 22 April 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

The communications sector is subject to the general Irish data protection regime as set out in the Data Protection Act 2018.

The Communications (Retention of Data) Act 2011 (the 2011 Act) sets out a specific regime for the retention of certain communications data for, inter alia, the investigation, detection and prosecution of criminal offences. A regime is also in place for the interception of communications by the Irish police force and the Defence Forces. In 2014, the CJEU found that Directive 2006/24/EC (Data Retention Directive), the basis for the Communications (Retention of Data) Act 2011, was invalid. As a result of the CJEU decision, no specific legal act at the EU level obliges Ireland to maintain a data retention regime in place. In December 2018, the Irish High Court ruled that the 2011 Act is incompatible with EU and European Convention on Human Rights law, and the Supreme Court referred this issue to the European Court of Justice. On 5 April 2022, the CJEU confirmed that the general and indiscriminate retention of traffic and location data was contrary to EU law regardless of whether the purpose was to combat serious crime. To preserve the 2011 Act from being struck down as invalid, in July 2022, the Communications (Retention of Data) (Amendment) Act 2022 was adopted to amend the 2011 Act. The Communications (Retention of Data) (Amendment) Act 2022 was commenced on 26 June 2023 by SI 287/2023. Its primary purpose is to enable the Irish police force to access communications traffic and location data for criminal justice purposes.

The Privacy Regulations from the EU electronic communications reform package previously mentioned also apply pending the publication of the proposed ePrivacy Regulation.

Separately, Regulation (EU) 2016/679 (General Data Protection Regulation) (GDPR) and the Data Protection Act 2018 also apply to the communications sector.

Law stated - 22 April 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The Criminal Justice (Offences Relating to Information Systems) Act 2017 was the first piece of national legislation specifically relating to cybercrime and is designed to modernise the Irish framework relating to such crimes (previous legislation referred to ‘unlawful use of a computer’ that did not adequately address problems facing current society).

This legislation introduced several new offences such as:

- accessing an information system without lawful authority;
- interfering with an information system without lawful authority to intentionally hinder or interrupt its functioning;
- interfering with data without lawful authority;
- intercepting the transmission of data without lawful authority; and
-

use of a computer, password, code or data for the commission of any of the above offences.

Other pieces of legislation that include cybersecurity-related provisions also include:

- the GDPR: data controllers are required to take 'appropriate security measures' against unauthorised access, alteration, disclosure or destruction of data, in particular where the processing involves the transmission of data over a network, and comply with strict reporting obligations in relation to incidents;
- the Privacy Regulations: require providers to implement appropriate technical and organisational measures to safeguard the security of their services and report incidents. It also prohibits interception or surveillance of communications and the related traffic data over a publicly available ECS without users' consent; and
- SI 360/2018 European Union (Measures for a High Common Level of Security of Network and Information Systems) Regulations 2018 (the NISD Regulations): the NISD Regulations require that operators of essential services and digital services take appropriate measures to prevent and minimise the impact of incidents affecting the security of the network and information systems used for the provision of essential and digital services with a view to ensuring continuity.

The DECC published an updated National Cybersecurity Strategy in December 2019 (effective until 2024). Objectives of the strategy included:

- to continue to improve the ability of the state to respond to and manage cybersecurity incidents;
- to identify and protect critical national infrastructure by ensuring that essential services have appropriate cybersecurity incident response plans;
- to improve the resilience and security of public-sector IT systems;
- to invest in educational initiatives to prepare the workforce for advanced IT and cybersecurity careers;
- to raise awareness of the responsibilities of businesses around securing their networks, devices and information; and
- to invest in research and development in cybersecurity in Ireland.

This National Cybersecurity Strategy has resulted in a public consultation towards a Cyber Industrial Strategy, intended to facilitate the creation of a government strategy for the development of the cyber industry in Ireland. Further, a National Cyber Security Bill is being considered by the Irish legislature. This bill will establish the National Cyber Security Centre (NCSC) on a statutory basis and provide for related matters including clarity around its mandate and role. It will also transpose the NIS2 Directive (2022/2555) into Irish law.

In common with similar bodies in other EU member states, the NCSC has also steadily moved towards a more proactive approach across a range of areas. The provisions of the NISD Regulations have been used to develop a quasi-regulatory approach for critical infrastructure providers, an approach that operates in tandem with the NCSC's existing and ongoing work. Enforcement powers under the NISD Regulations allow NCSC-authorised officers to conduct security assessments and audits, require the provision of information and issue binding instructions to remedy any deficiencies.

Over the last number of years a working group consisting of the NCSC, ComReg and selected providers of ECN and ECS held a series of thematic workshops culminating in a set of documents known as the Electronic Communications Security Measures (ECSMs). The security measures contained in the ECSMs will be provided with a legislative basis through the transposition of the EECC. The ECSMs were subject to a technical stakeholder consultation process in January 2022 and given statutory footing in the Communications Regulation and Digital Hub Development Agency (Amendment) Act 2023.

Law stated - 22 April 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

On 1 November 2022, the Digital Markets Act (DMA), came into force thereby starting a six-month transition period before the DMA became enforceable. The DMA aims to tighten regulation in respect of the largest global tech companies (referred to as 'gatekeepers') from using their 'interlocking services' to combine data from multiple platforms and allow big tech to gain sophisticated profiles of users. Among the key changes as part of the DMA, it is envisaged that combined personal data for targeted advertising will only be allowed with explicit consent from the gatekeeper.

Until the introduction of the DMA, the debate in relation to the legal challenges raised by big data focused solely on the application of general data protection rules to each new way in which personal data are collected, stored, used and analysed, and these rules will remain relevant going forward.

For instance, current data protection law requires that personal data is only used for specific purposes, which, naturally, restricts the trend in big data to make use of data in previously unknown ways. This means that big-data systems should ideally be set up with this purpose limitation in mind, with each new use of personal data generating its own risk profile. There have been discussions around the use of techniques to effectively anonymise or pseudonymise personal data as a solution to this, so that the data falls outside the scope of data protection rules, although achieving this can sometimes be difficult.

While this may somewhat limit the ability to commercially exploit big data, the enforcement of data protection law in Ireland is not static and is adaptable to each new innovation. The Irish Data Protection Commission takes a pragmatic approach to the treatment of big data and considers meaningful consultation with organisations operating in this space, including the many leading multinational technology companies based in Ireland, as essential to this strategy. The Edward Snowden allegations of large-scale access by US authorities to EU citizens' personal data have brought the treatment of big data to the forefront of political discussion in the European Union, including Ireland. Significant changes are likely to come about as a result of the GDPR, implemented in Ireland by the Data Protection Act 2018.

Concerning big data, article 22 of the GDPR provides inter alia that:

> [T]he data controller shall implement suitable measures to safeguard the data subject's rights and freedoms and legitimate interests, at least the right to obtain human intervention on the part of the controller, to express his or her point of view and to contest the decision.

Section 57 of the Data Protection Act 2018 gives further effect to article 22 of the GDPR in outlining the rights of the individual concerning automated decision-making. As such, automated processing is only permitted with the express consent of the individual, when necessary for the performance of a contract or where authorised by EU or EU member state law. Also, where automated processing is permitted, measures must be in place to protect the individual (eg, the right to present their point of view). Automated processing can apply to sensitive personal data (as outlined under the Data Protection Act 2018) based on express consent or reasons of substantial public interest.

Many of the big data companies have important locations for their businesses in Ireland. The Data Protection Commission (DPC) is tasked with investigating breaches of data regulation by these companies where such breaches occur in this jurisdiction. The DPC opened an inquiry into Facebook in 2019 on how it stored user login data, and in 2018 the DPC investigated Facebook for non-compliance with its obligation under the GDPR to implement technical and organisational measures to ensure the security and safeguarding of personal data it processes.

More recently, the EU Commission commenced proceedings against Alphabet, Apple and Meta (designated as gatekeepers under the DMA) due to concerns that these companies were not fully compliant with their obligations under the DMA. In the event that these gatekeepers are found to be infringing the DMA, significant fines of up to 10 per cent of the company's total worldwide turnover can be imposed, or in repeated infringements, 20 per cent of turnover.

Law stated - 22 April 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

There are no laws or regulations that require data to be stored locally in Ireland. Neither the GDPR nor the Data Protection Act 2018 detail specific security measures that a data controller or data processor must have in place, although they provide examples of such measures, such as the pseudonymisation and encryption of personal data. They place an obligation on data controllers to ensure that data is processed in a manner that ensures 'appropriate security of the data' in light of the risk profile of the relevant data. The measures used by the data controller must ensure that a level of security is provided that is proportionate to the harm that may result from destruction, loss, alteration or disclosure of the data. Data controllers and data processors are also obliged to ensure that their staff and 'other persons at the place of work' are aware of security measures and comply with them. The legal obligation to keep personal data secure applies to every data controller and data

processor, regardless of size. The Privacy Regulations further detail some requirements specific to the electronic communications services sector.

Chapter V of the GDPR specifies the conditions that must be met before personal data may be transferred to third countries. Organisations that transfer personal data from Ireland to third countries (namely, places outside of the European Economic Area) need to ensure that the country in question provides an adequate level of data protection. Some third countries have been approved for this purpose by the European Commission. The adequacy decision of the European Commission that underpinned the US Safe Harbour arrangement has now been invalidated by a decision of the Court of Justice of the EU (CJEU) of 6 October 2015 (Case C-362/14). This was replaced by the EU–US Privacy Shield, which was also invalidated by a decision of the CJEU of 16 July 2020 (Case C-311/18). Consequently, it is no longer lawful to make transfers from the European Union to the United States based on these frameworks. However, in July 2023, the European Commission adopted a new adequacy decision, in the form of the EU–US Data Privacy Framework. Under the new Framework, companies are able to transfer data from the EU or EEA to US-certified companies without putting in place a transfer tool, such as the Standard Contractual Clauses, under Chapter V of the GDPR.

Law stated - 22 April 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

In the Electronic Communications Strategy Statement 2023–2025, ComReg identified four principle trends it considers will both shape the sector and pose regulatory challenges over the coming years and are as follows.

- Connectivity, network rollout and new technologies: the deployment of high-speed ECN is playing an increasingly important role across the country over the period covered by ComReg's strategy, enabling innovation and further digitalisation across different sectors of Irish society. ComReg further notes that in addition to ensuring coverage and reliability, a key consideration regarding future networks and connectivity will be improving security and reliance. Network security depends not only on technical security features, but also on the design, implementation, and operation of the network.
- Consumer experience: ComReg notes that it has a role to protect consumers' rights and to prevent operators from exploiting consumers in the ECS markets. ComReg further notes that it closely monitors the experience of consumers, including the experience of consumers who engage with their service provider to sign up for services, raise queries or resolve complaints. This work informs its overall view of the consumer experience, as well as provides context to ComReg's ECS Strategy Statement.
- The evolution of adjacent and related markets: in its Strategy Statement, ComReg notes that as markets relevant to the regulation of ECN or ECS evolve, the lines between them blur and change the industry's structure and competitive

landscape. Due to these changing dynamics, effective regulation will require an understanding of the complex ecosystem of related markets and the role of electronic communications as an enabler of innovation in these markets. As such, ComReg monitors developments in the wider value chain, namely, input markets, complementary markets, and downstream markets.

- The future of regulation in the sector: the final key trend relates to the range of developments in regulation that will arise during the period covered by ComReg's strategy statement. Several legislative changes and developments are anticipated to take place over the coming years that will likely impact ComReg's role and mandate, concerning the following areas:
    - ComReg's consumer protection mandate;
    - cybersecurity strategy for the digital decade;
    - broadband cost reduction;
    - privacy and electronic communications; and
    - market surveillance.

A public consultation process was launched in late 2024/early 2025 to prepare for a new 2025–2027 Strategy Statement. In addition to its existing mandates, ComReg expects to receive further mandates in sectors like cybersecurity and access to/use of data, which need to be accounted for in the new strategy statement.

Law stated - 22 April 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The broadcasting sector in Ireland is regulated by the Broadcasting Act 2009 (the Broadcasting Act) (as amended by the Online Safety and Media Regulation Act 2022 (the OSMR Act), which dissolved the previous regulatory entity, the Broadcasting Authority of Ireland (the BAI) and has since established in its place a content regulator, Coimisiún na Meán (the Media Commission). The Broadcasting Act sets out the regulatory framework for the media and broadcasting sector in the state. The Commission for Communications Regulation's (ComReg) role in respect of the broadcasting sector is limited to the issuing of licences under the Wireless Telegraphy Acts, in respect of wireless equipment and assignment of required radio spectrum. The Broadcasting Act and regulator were modernised and changed with the introduction of the OSMR Act, which commenced on 15 March 2023.

Among numerous things, the OSMR Act established a new regulator, the Media Commission, a multi-person Media Commission to which Ireland's first Online Safety Commissioner has been appointed (Niamh Hodnett). The Media Commission replaces the BAI and is responsible for overseeing updated regulations for broadcasting and video-on-demand services and the new regulatory framework for online safety created

by the OSMR Act. Within its structure, the Media Commission has a chairperson and separate commissioners overseeing broadcasting (yet to be appointed following Celene Craig's departure), media development, online safety and digital services. The OSMR Act also provides for additional powers for the Media Commission in relation to compliance and enforcement, including the power to impose administrative financial sanctions. In March 2023, the BAI was fully dissolved and the Media Commission became operational.

The OSMR Act creates extensive provisions for online safety and sets out a definition for harmful online content. This transposes requirements under the revised Audiovisual and Media Service Directive (AVMSD (2018 Directive)) with regard to video-sharing platforms. However, the OSMR Act also provides for a definition of age-inappropriate online content and sets out procedures for addressing harmful online content. These procedures include the formulation of online safety codes by the Media Commission, addressed to designated online services.

The Digital Services Act 2024 (the 2024 Act) designates the Media Commission and the Competition and Consumer Protection Commission (CCPC) as competent authorities for the Act's enforcement, with the Media Commission taking lead. Furthermore, the Media Commission is designated as the Digital Services Coordinator for Ireland. The 2024 Act has greater advertising transparency, and prohibits all advertising that targets children and which is based on 'special categories of personal data' such as sexual orientation and religion.

Law stated - 22 April 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Non-EU applicants for broadcasting contracts are required to have their place of residence or registered office within the European Union or as otherwise required by EU law. The framework for the ownership and control policy of the Media Commission is set out in the Broadcasting Act, which requires the Media Commission, in awarding a sound broadcasting contract or television programme service contract (or consent to a change of control of the holder of a broadcasting contract), to have regard, inter alia, to the desirability of allowing any person or group of persons to have control of or substantial interests in an 'undue number' of sound broadcasting services, or an 'undue amount' of communications media in a specified area. The Media Commission has also issued an ownership and control policy, setting out the regulatory approach that the Media Commission will take and the rules that will be enforced regarding ownership and control of broadcasting services. The policy will be used by the Media Commission to assess applications for broadcasting contracts and requests for variations in ownership and control structures of contract holders.

Media mergers must be notified to both the Irish Competition and Consumer Protection Commission CCPC and the relevant minister. The CCPC is responsible for carrying out

the substantive competition review to determine whether the merger is likely to give rise to a substantial lessening of competition. It is the role of the Minister for Tourism, Culture, Arts, Gaeltacht, Sport and Media (the Minister) to assess 'whether the result of the media merger is likely to be contrary to the public interest in protecting plurality of the media in the State' and this includes a review of 'diversity of ownership and diversity of content'. The Competition Acts provide for a set of 'relevant criteria' by which the Minister must assess whether the media merger will be likely to affect the plurality of the media in the state. In particular, the relevant criteria include considering, inter alia, the undesirability of allowing one undertaking to hold significant interests within a sector of the media business, the promotion of media plurality and the adequacy of the existing state-funded broadcasters to protect the public interest in a plurality of the media in the state. The Department of Communications, Climate Action and Environment (now the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media) published Media Merger Guidelines in May 2015. In the interests of transparency, the Minister publishes summary details of the rationale for clearing media mergers.

The Irish implementation of the EU FDI Regulation also applies to media services where non-EEA purchasers will have to obtain approval from the Department of Enterprise, Trade & Employment (in addition to CCPC and Ministerial approvals).

Law stated - 22 April 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

The Media Commission is responsible for the licensing of the national television service, and content on digital, cable, multimedia displays and satellite systems. The licensing of content on these systems is an ongoing process with no time frame for applications, no competitive licensing process and one-off application fees (these depend on the licence being acquired but are typically less than €2,000).

The Media Commission is responsible for the licensing of independent radio broadcasting services in Ireland and Part 6 of the Broadcasting Act sets out the mechanism by which the Media Commission shall undertake the licensing process for commercial, community, temporary and institutional radio services.

Law stated - 22 April 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

The European Communities (Audiovisual Media Services) Regulations 2010 (SI 258/2010) and the European Communities (Audiovisual Media Services) (Amendment) Regulations

2012 (SI 247/2012) (the AVMS Regulations) implement the Audiovisual Media Services Directive (AVMSD) (2010 Directive). The AVMS Regulations outline that, where practicable and by appropriate means, broadcasters must progressively reserve at least 10 per cent of their transmission time (excluding the time applied to news, sports events, games, advertising and teletext services) for EU works created by producers who are independent of broadcasters, or reserve 10 per cent of their programming budget for EU works that are created by producers who are independent of broadcasters, having regard to its various public responsibilities. The AVMS Regulations require EU member states to ensure that on-demand audiovisual media services also promote EU works; however, quotas for EU works are not imposed on non-linear audiovisual services.

In transposing the revised AVMSD (2018 Directive), the OSMR Act implements a new 30 per cent quota for EU works in the catalogues of video-on-demand services, alongside a content production levy and content production scheme to support the creation of EU works, including independent Irish productions. This translates into an obligation for video-on-demand services, such as Apple TV or Disney Plus, to meet a quota of 30 per cent and ensure the prominence of EU content in their catalogues, and is regulated across the European Union depending on the country where the company is based. Ireland will be responsible for regulating a significant number of these companies because it is home to the headquarters of a number of social media companies such as Apple and Google. It is considered a criminal offence for an on-demand audiovisual media service to not comply with this obligation and the relevant rules in its application.

Law stated - 22 April 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

The Media Commission is currently tasked with the development, review and revision of codes and rules concerning advertising standards to be observed by broadcasters, and consideration of and adjudication on complaints concerning material that is broadcast, including advertising. The Broadcasting Act (as amended by the OSMR Act) provides that advertising codes must protect the interests of the audience and in particular, any advertising relating to matters of direct or indirect interest to children must protect the interests of children and their health. By way of example, the Media Commission has issued General and Children's Commercial Communications Codes, including rules to be applied to the promotion of high-fat, salt and sugar foods to children. Further rules are set out in the AVMS Regulations concerning 'audiovisual commercial communications' on on-demand services. The Media Commission's General Commercial Communications Code sets out the rules with which Irish radio and television stations must comply when it comes to airing advertising, sponsorship, product placement and other forms of commercial communications. Since implementation of the OSMR Act, certain parts of the Broadcasting Act apply to broadcast services that are provided through the internet and non-linear services.

A voluntary self-regulatory code is also in operation and is administered by the Advertising Standards Authority (ASA), which sets out guidelines for advertising concerning a range of topics including food, financial services and business products. This code applies to online advertising. On 1 March 2016, the new ASAI Code of Standards for Advertising and Marketing Communications in Ireland came into effect. The updated Code features new sections on e-cigarettes and gambling and revised sections on food (including rules for advertisements addressed to children), health and beauty and environmental claims. Furthermore, broadcasters should observe relevant national and EU rules on advertising of specific types of products and services (eg, alcohol, tobacco, health foods, airfares, etc) and consumer protection rules on types of advertising practices permitted (eg, consumer information requirements, misleading information rules, etc).

Law stated - 22 April 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

The Broadcasting Act requires 'appropriate network providers' to ensure, if requested, the retransmission by or through their appropriate network of each free-to-air television service provided for the time being by RTÉ, TG4 and Virgin Media Ireland's free-to-air service. An appropriate network is defined as an electronic communications network provided by a person, the 'appropriate network provider', that is used for the distribution or transmission of broadcasting services to the public. The appropriate network provider is not permitted to impose a charge for the above-mentioned channels.

A public service broadcasting charge was suggested by previous governments as a means of funding public broadcasting in light of the changing ways that viewers now access public service broadcasting. While such plans have since been shelved, more recent discussions have reintroduced the possibility of a public service broadcasting charge. At the time of writing, no definitive decision has been reached.

Law stated - 22 April 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

The Internet Services Providers Association of Ireland (ISPAI) has responsibility for supervising the ongoing evolution of the self-regulation of the internet in Ireland and has set out guidelines in its Code of Practice and Ethics (the Code) that ISPAI members should take into account when operating.

In its statement of policy, the ISPAI acknowledges that its members must observe their legal obligation to remove illegal content when informed by organs of the state or as otherwise

required by law. The general requirements of the Code issued by the ISPAI include a requirement on all members to use best endeavours to ensure that services (excluding third-party content) and promotional material do not contain anything that is illegal or is likely to mislead by inaccuracy, ambiguity, exaggeration, omission or otherwise. They must also ensure that services and promotional material are not used to promote or facilitate any practices that are contrary to Irish law, nor must any services contain material that incites violence, cruelty, racial hatred or prejudice or discrimination of any kind.

Members' internet service providers are also required to register with www.hotline.ie, which is a notification service to facilitate the reporting of suspected breaches under the Child Trafficking and Pornography Acts 1998 to 2004 (as amended by the Criminal Law (Sexual Offences) Act 2017) and the removal of illegal material from internet websites.

The On-Demand Audiovisual Media Services Code of Conduct is an industry-developed code that covers on-demand audiovisual services in Ireland, addressing topics such as advertising, content standards and dispute resolution.

The regulation of new media content changed following the implementation of the OSMR Act and the creation of the new regulator, the Media Commission. The Media Commission is tasked with the responsibility of overseeing updated regulations for broadcasting and video-on-demand services. This updates how television broadcasting services and video-on-demand services are regulated and ensures greater regulatory alignment between traditional linear TV and video-on-demand services, such as RTÉ Player and Apple TV. As part of the Media Commission's statutory remit, it creates binding Media Codes and Rules reflecting the standards that audiovisual services must adhere to in relation to programme content and may investigate the compliance of audiovisual media services with Media Codes, Media Rules, on its own initiative or on the basis of a complaint. The Media Commission has the power to seek the imposition of a number of sanctions on a non-compliant on-demand audiovisual media service, in the event that they have failed to comply with a warning notice. It also has the power to seek the prosecution of senior management of designated online services for failure to comply with a notice to end non-compliance.

The Media Commission also has the power to impose a levy on registered providers' Irish revenue, which would be used to fund its regulatory activities and new grant schemes for Irish media production. However, this power will not be exercised until there is a full review and consultation on its merits and it is not intended that a levy would be imposed on providers with a minimal Irish presence.

As provided for in the Broadcasting Act, television broadcasting services are regulated on a contractual basis and non-compliance by such services with Media Codes and Media Rules may be pursued by the Media Commission as a breach of contract. Non-compliance with these obligations will be dealt with through a stepped process of compliance and warning notices. Ultimately, non-compliance with a warning notice is a criminal offence.

Law stated - 22 April 2025

Digital switchover

When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The digital switchover occurred on 24 October 2012. The 800MHz band had been used for analogue terrestrial television services. This spectrum was auctioned off (along with the 900MHz and 1,800MHz spectrum) in autumn 2012 for use in electronic communications services (ECSs).

Law stated - 22 April 2025

Digital formats

25 Does regulation restrict how broadcasters can use their spectrum?

As required by the legislative framework, ComReg has moved towards a position where it will issue licences on a technology and service-neutral basis and that new rights of use will issue on a service and technology-neutral basis. For example, ComReg awarded the 3.6GHz spectrum band in 2017, following a lengthy consultation process on a service and technology-neutral basis (namely, holders of the new rights of use may choose to provide any service capable of being delivered using the assigned spectrum). For instance, they could distribute television programming content, subject to complying with the relevant technical conditions and with any necessary broadcasting content authorisations or they could adopt some other use. ComReg may, through licence conditions or otherwise, provide for proportionate and non-discriminatory restrictions to the types of radio network or wireless access technology used for ECSs where this is necessary (eg, to avoid harmful interference and safeguard the efficient use of spectrum).

Law stated - 22 April 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

The Competition Acts 2002–2022 (the Competition Acts) provide for special additional rules for 'media mergers' (namely, a merger or acquisition in which two or more of the undertakings involved carry on a media business in the state, or that one or more of the undertakings involved carries on a media business in the state and one or more of the undertakings involved carries on a media business elsewhere). A 'media business' means the business (whether all or part of an undertaking's business) of:

- the publication of newspapers or periodicals consisting substantially of news and comment on current affairs, including the publication of such newspapers or periodicals on the internet;
- transmitting, retransmitting or relaying a broadcasting service;

- providing any programme material consisting substantially of news and comment on current affairs to a broadcasting service; or
- making available on an electronic communications network any written, audiovisual or photographic material, consisting substantially of news and comment on current affairs, that is under the editorial control of the undertaking making such material available.

Media mergers are notifiable to both the CCPC and the Minister (regardless of the turnover of the undertakings concerned) to assess whether the media merger would be contrary to the public interest in protecting the plurality of the media in the state. The Competition Acts provide for a set of 'relevant criteria' by which the Minister must assess whether the media merger will be likely to affect the plurality of the media in the state. In particular, the relevant criteria include considering, inter alia, the undesirability of allowing one undertaking to hold significant interests within a sector of the media business, the promotion of media plurality and the adequacy of the existing state-funded broadcasters to protect the public interest in a plurality of the media in the state. The Media Commission may play a role in assessing media plurality should the transaction be referred to a phase II process by the Minister.

In terms of steps the authorities may require companies to take as a result of a media merger review, the Minister may determine that the media merger be put into effect, determine that the media merger be put into effect subject to conditions or determine that the media merger may not be put into effect. The Department of Environment, Climate Action and Communications' (DECC) Media Merger Guidelines guide the media-merger process and the DECC now publishes information regarding its process and a summary of each media merger determination in the interests of transparency. There is an ongoing review of the media merger regime by the DECC.

In June 2019, the BAI (now known as the Media Commission) published two new documents:

- the Media Plurality Policy, which sets out how the Media Commission will support media plurality in the future. It sets out a definition for media plurality, outlines why media plurality is important, details policy objectives and outlines the measures the Media Commission takes and will take to promote and support media plurality in Ireland; and
- the Ownership and Control Policy (updated March 2024), which will be used by the Media Commission to assess requests for changes to the ownership and control of existing broadcasting services. The policy provides guidance and rules for the Media Commission when considering the desirability of allowing any person, or group of persons, to have control of, or substantial interests in, an undue number of media services in the Irish state.

The Media Commission published a consultation on 1 November 2024 seeking responses on the topic of developments in media plurality in Ireland between 2021 and 2023. It was aimed at determining the impact of media mergers in Ireland, the cumulative effect of such mergers and the potential need for enhanced safeguards or commitments from parties to such mergers to protect media pluralism. No results of this consultation have been published at this time.

Law stated - 22 April 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

There has been a marked increase in the number of media mergers in Ireland in recent years, a trend that can be seen across the European Union as traditional media outlets need to consolidate to ensure continued survival in a difficult environment. In 2023 alone, the CCPC reviewed and issued merger determinations in relation to four media mergers. There has only been two phase II media mergers in the Irish context (2017). The first involved the proposed acquisition of Sappho Limited (*Irish Examiner*) by the Irish Times DAC, and the second related to Trinity Mirror Plc's acquisition of Northern & Shell Network Limited, International Distribution 2018 Limited and a 50 per cent share of Independent Star Limited. Both mergers were cleared, however, Trinity Mirror's acquisition was subject to binding commitments.

The primary legislative focus for the Department over the course of the previous years was the enactment of the OSMR Act (on 23 September 2021, Ireland was directed to implement the revised AVMSD (2018 Directive) without further delay following a failure to ensure transposition of the same before year-end 2020), which significantly impacted how non-traditional media companies and broadcasters operate in Ireland through enhanced regulatory scrutiny by the newly established Media Commission. The full consequences of the new Media Commission regime will not be clear until the Media Commission issues Rules and Codes and we hope that these will be subject to industry consultation. However, there will be and have been more near-term consequences, including an obligation for all providers of audiovisual on-demand services in the state to register with the Media Commission within three months of its establishment.

Law stated - 22 April 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

Coimisiún na Meán (the Media Commission) is currently responsible for the regulation of the broadcasting and audiovisual content sector. The Irish Competition and Consumer Protection Commission (CCPC) is responsible for administering and enforcing the Competition Acts 2002–2022 across all sectors. The Commission for Communications Regulation (ComReg) is responsible for the regulation of the electronic communications sector and ComReg has co-competition powers with the CCPC that enable it to pursue issues arising in the electronic communications sector under competition law and to take

action in respect of anticompetitive agreements and abuse of dominance. ComReg and the Media Commission are each parties to a cooperation agreement with the CCPC to facilitate cooperation, avoid duplication and ensure consistency between the parties insofar as their activities consist of, or relate to, a competition issue.

Law stated - 22 April 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

A decision of ComReg may either be challenged by way of judicial review or in accordance with the Communications Regulation and Digital Hub Development Agency (Amendment) Act 2023 (the 2023 Act). Under the 2023 Act, an appeal to the High Court must be brought by a user or undertaking that is affected by the decision and must be lodged within 28 calendar days of the date after the user or undertaking has been notified of the decision. An appeal can be brought based on law or errors of fact. Where the appeal is made to the High Court, either party may seek for the matter to be transferred to the Commercial Court, which is a specialist part of the High Court that generally hears appeals within six months of the date the appeal is lodged.

Judicial review proceedings must be brought within 28 days of a ComReg decision being published (although this can be extended by the court if it considers that there is good and sufficient reason to do so). The Irish courts have jurisdiction to examine the procedural fairness and lawfulness of decisions of public bodies in judicial review proceedings, rather than the merits of a decision.

Any other procedures available to remedy the matter must usually be exhausted before bringing judicial review proceedings. A decision of the Media Commission may be challenged by way of judicial review in the High Court. Also, a decision by the Media Commission to terminate or suspend a contract made under Part 6 or Part 8 of the Broadcasting Act 2009 (the Broadcasting Act) (as amended by the Online Safety and Media Regulation Act 2022) may be appealed by the holder of the contract to the High Court under section 51 of the Broadcasting Act. A decision by the Minister for Tourism, Culture, Arts, Gaeltacht, Sport and Media (the Minister) in respect of a media merger must be brought in the High Court not later than 40 working days from the date of determination. Alternatively, this period may be extended by the High Court if it considers that there is a substantial reason why the application was not brought in the period and it is just to grant leave to appeal outside the period.

Law stated - 22 April 2025

Competition law developments

30 | Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

There has been a marked increase in the number of media mergers notified since the 2014 media merger regime was implemented. In 2023, 2022 and 2021 respectively, five media mergers were notified to the CCPC, compared to three in 2020, 2019 and 2018. 2024, saw three media mergers notified to the CCPC, two were cleared in phase 1, with the third being cleared in phase 2. In the most recent data from 2023, the average clearance time frame for mergers was 18.8 working days within phase I, as against the statutory time frame of 30 working days.

Some notable media mergers include:

- the 2016 proposed acquisition by Independent News & Media of seven regional newspapers that made up the Celtic Media Group. No ministerial decision was made as the parties terminated the transaction by mutual consent during the extended merger process;
- the 2017 clearance of the 21st Century Fox and Sky merger with no commitments;
- the 2018 clearance of the Trinity Mirror and Northern & Shell merger with binding CCPC commitments;
- the 2019 clearance of Formpress' acquisition of certain business assets of Midland Tribune from Alpha Publications Limited with binding CCPC commitments (this media merger was subject to an extended phase I investigation);
- the 2020 clearance of the Reach Publishing Group and Independent Star Limited merger;
- the 2021 clearance of the Bauer Media Audio Holding GmbH and Communicorp Group Limited merger;
- the 2022 clearance of Viaplay Group UK Limited's acquisition of FreeSports Limited and Premier Broadcasting Limited;
- the 2023 clearance of the Bauer Media Audio Holding GmbH and Wilton Radio Limited merger; and
- the 2024 clearance of Formpress Publishing Limited and D&D Media Limited.

The Irish Times notified the CCPC of its intention to purchase the *Irish Examiner* (the effect of which would reduce the number of reputable daily broadsheets from three to two) and received phase II CCPC clearance on 24 April 2018. In June 2018, the Minister decided that the proposed merger would not adversely affect the plurality of media in Ireland. The Minister noted that, because of the financial position of the target company, the proposed transaction may in fact preserve the diversity of content and thus protect media plurality in the state.

An overhaul of the Irish competition law regime occurred in 2023 upon commencement of the Competition (Amendment) Act 2022 on 27 September 2023, which was signed into law in December 2022. The Competition (Amendment) Act 2022 transposed the much-anticipated Directive (EU) 2019/1 (ECN+ Directive) into Irish law. This amendment provides the CCPC with greater investigative and enforcement powers. For infringement of competition law, undertakings can now be convicted in criminal proceedings, with a maximum fine of €50 million or 20 per cent of its annual turnover imposed, or in civil proceedings where fines can be no greater than €10 million or 10 per cent of the undertaking's worldwide turnover.

Law stated - 22 April 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The primary legislation governing the communication sector in Italy is Legislative Decree No. 259/2003 (the Electronic Communications Code), which implemented the EU regulatory framework and regulates the electronic communications networks and services, the authorisation of electronic communications networks and services, the interconnection of electronic networks and user rights, and aims at:

- updating and harmonising the regulation of electronic communications networks and services;
- promoting the efficient, effective and coordinated use of spectrum and the development of very high-capacity networks;
- creating a favourable environment for investment and co-investment in very high-capacity networks;
- facilitating the access of operators into electronic communications markets and promoting competition;
- facilitating the access of users to electronic communications services and strengthening the protections provided for them; and
- defining the competencies of the regulatory and administrative authorities of the sector, and in particular of the Italian Communications Authority, the Ministry of Enterprises and Made in Italy (formerly the Ministry of Economic Development) and the newly established National Cybersecurity Agency.

More recently, Law Decree No. 48/2025 introduced new provisions regarding methods for user identification and established penalties for non-compliance.

Law No. 193/2024 introduces amendments to the rules on mobile number portability.

Legislative Decree No. 138 of 2024, in article 41, regulates the transitional regime and made the necessary repeals for the implementation of the NIS 2 Directive on cybersecurity, establishing the legal framework to ensure an orderly transition to the new provisions. In particular, article 2, paragraph 1, h), article 30, paragraph 26, and articles 40 and 41 of the Electronic Communications Code were repealed.

Legislative Decree No. 48/2024 contains corrective provisions to the 2003 Electronic Communication Code, aiming to simplify the implementation of electronic communication infrastructures and the adaptation to technological innovation.

The main amendments concern:

- the introduction of the definitions of ‘Access Point’ and ‘Mac Address’ (media access control address);
- the introduction of the concept of Certified Start of Activity Report (SCIA), to allow a homogeneous recognition of the legal authorisation schemes;

- the introduction of textual amendments to the original provisions regarding the market entry and distribution;
- the introduction of some changes in the area of access to local radio-frequency networks; and
- the introduction of some new rules for the activation of sim cards (including references to numbering resources, blocking of foreign numbers, identification of mobile phone users).

Legislative Decree No. 70/2003 (the E-commerce Decree) provides for the rules governing liability of internet service providers (namely, access, caching and hosting providers).

Legislative Decree No. 196/2003 (the Data Protection Code) provides specific rules concerning the protection of personal data processed by operators in the context of provision of electronic communications services, in addition to the provisions laid down in Regulation (EU) 2016/679 (the General Data Protection Regulation) (GDPR).

Moreover, the Italian Communications Authority (AGCOM) issues resolutions as secondary legislation containing detailed rules in the offering of electronic communication services and networks. Indeed, AGCOM, established by Law No. 249/1997, is a regulatory agency designed to actively promote the integration between the telecommunication and media markets and to supervise and monitor the markets.

The Data Protection Authority issues resolutions containing specific obligations for operators in the storage, processing and use of personal data information.

The Ministry of Enterprises and Made in Italy (the Ministry) is in charge, inter alia, of issuing authorisations and allocating the spectrum.

A general authorisation is required to offer electronic communications services in Italy. Such authorisation can be issued only to:

- entities with a permanent establishment in Italy or a country within the European Economic Area;
- member states of the World Trade Organization; and
- countries granting Italian citizens reciprocal rights of access to the relevant telecoms activity (article 11 of the Electronic Communications Amending Law).

Such general authorisation must be obtained for every single service offered, by submitting an application drawn up in accordance with Annex 14 to the Electronic Communications Amending Law, exclusively through the website of the Ministry's SIDFORS platform.

Requests for general authorisations to operate phone centres, internet points, fax and data-processing centre services do not have to be submitted through the SIDFORS portal but directly to the competent territorial inspectorate.

Law stated - 10 May 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

Under article 11 of the Electronic Communications Amending Law, an operator that intends to provide electronic communications networks and services or to establish and operate network equipment at a point of presence in Italy shall apply with the Ministry for the issuance of a general authorisation that is required to offer electronic communications services in Italy.

The request must describe the services to be rendered and identification data about the applicant.

Starting from the filing of the relevant request, the operator is immediately entitled to run the activity. However, the Ministry has a 60-day term (from filing) to deny the authorisation. If the Ministry does not respond within this deadline, the authorisation is definitively issued.

General authorisations have a maximum validity of 20 years and may be renewed.

All operators holding a general authorisation are obliged to register with the Register for Communications Operators kept by AGCOM.

General authorisations are subject to payment of an annual contribution to the Ministry, whose amount is indicated in the Electronic Communication Code based on the service currently provided by the operator and the relevant extension thereof.

Law stated - 10 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

The spectrum licences specify the permitted spectrum use. Under article 14 of the 2003 Electronic Communications Code, the Ministry prepares the master plan for the use of spectrum licences, while AGCOM is in charge of the allocation plan.

The most up-to-date master plan is Ordinary Supplement No. 35, adopted by Ministerial Decree dated 31 August 2022 and published in Italian Official Gazette No. 214 on 13 September 2022. It provides the principles for the allocation of the frequencies between zero GHz and 3,000GHz to each type of service (eg, fixed, mobile, satellite or radio navigation), the authorities to which the frequencies shall be required (eg, the Ministry and the Ministry of Defence) and the frequency bands and (if any) the international provision applicable.

Individual rights of spectrum use are granted within the limits set out in the master plan, and any holders of such rights shall be compliant with the spectrum use allocated.

Law stated - 10 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

According to EU Recommendation No. 879 of 17 December 2007, the electronic communications sector that is subject to ex-ante regulation can be divided into two groups:

- markets for fixed networks (eg, services for access to new generation networks); and
- markets for interconnection services on fixed and mobile networks (eg, interconnection services on fixed networks).

EU Recommendation No. 710 of 9 October 2014 modified the number and list of markets that are subject to ex-ante regulation. In particular, the latest Recommendation included fixed and mobile call-termination markets in the list, as well as wholesale broadband access markets.

The European Commission, under article 64 of Directive (EU) 2018/1972, which establishes the European Electronic Communications Code (EECC), periodically reviews electronic communications markets that may be subject to ex-ante regulation, updating the 'Recommendation' on relevant markets. National Regulatory Authorities (NRAs) are required to analyse these markets and, in some cases, can identify additional markets for regulation. NRAs must also review markets not included in the Recommendation if they are already regulated based on previous market analyses.

AGCOM, under Legislative Decree No. 207 of 8 November 2021, which transposes the EECC, conducts periodic market analyses to identify relevant markets at the national level, check for the presence of companies with significant market power, and determine if ex-ante regulatory obligations should be imposed.

On 1 November 2022, the EU Digital Markets Act (the DMA) came into force. It regulates the activities of major digital platforms in the EU market and it applies to gatekeepers, namely, companies offering online intermediation services (including search engines, social networks, messaging and video sharing).

The DMA introduces an ex-ante approach whereby specific and circumscribed obligations are imposed on the operators of platforms qualified as gatekeepers.

Law stated - 10 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

Under article 17 of the Electronic Communications Amending Law, companies with exclusive or special rights for public communication network installation or communication services provision – in Italy or even abroad – shall provide networks or electronic communication services accessible to the public only through their subsidiaries or affiliated companies (eg, structural separation). This limitation does not apply to companies that generate an annual turnover of less than €50 million with the provision of electronic communication networks or services in the European Union.

Functional separation is instead provided by article 88 of the Electronic Communications Amending Law as an exceptional measure to be implemented if AGCOM assesses that other available remedies have failed to achieve effective competition. If AGCOM intends to impose a functional separation, it shall notify its proposal to the European Commission, explaining the grounds of such proposal.

Law stated - 10 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

The services that must be made available to end users and must be provided by all operators as universal service obligations are:

- access to end users from a fixed workstation (article 96 of the Electronic Communications Amending Law); and
- special measures for disabled and low-income users (article 95 of the Electronic Communications Amending Law).

AGCOM identifies one or more undertakings in charge of providing the universal service at an accessible price.

If AGCOM finds that the provision of the universal services by the identified undertaking results in an unfair burden to the latter upon the undertaking's request, it will share the net costs deriving from the provision of the universal services among providers of electronic communications networks and services using the ad hoc fund established by the Ministry (article 98-ter of the Electronic Communications Amending Law).

Law stated - 10 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

With Resolution No. 274/07/CONS (article 6 et seq), AGCOM has set the standards for activation and migration of fixed number procedures and pure number portability (it will take place without being accompanied by the transfer of physical access resources).

Under article 98-octies decies of the Electronic Communications Amending Law, users have the right to change operator for mobile phone, voice and data services, while keeping their own mobile number (mobile number portability). The relevant inter-operator procedures are regulated by Resolution No. 339/18/CONS. The user is not actively involved in the transfer procedure. It is simply requested to subscribe to an offer with a new operator and communicate to the latter the transfer code. Thus, the user shall not even communicate the withdrawal to the former operator as the new operator is in charge of dealing with

the transfer procedure, including liaising with the former operator to terminate the user's contractual relationship.

With Resolution No. 86/21/CIR, AGCOM introduced new verification obligations for the operator involved in the portability procedure to avoid the risk of fraud with SIM card replacement (called SIM Swap) against consumers. Such obligations came into force on 14 November 2022.

Law stated - 10 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Consumers are generally protected by Italian Legislative Decree No. 206/2005 (the Consumer Code) both from a contractual point of view (including off-premises agreements) and against unfair business-to-consumer commercial practices (including teleselling practices).

Specific rules are further provided by the E-commerce Decree (implementing EU Directive 2000/31/EC) on information society services and electronic commerce, which, among others, includes specific provisions on the information to be provided to consumers when dealing with electronic agreements.

Also, the Electronic Communications Code provides for specific terms and conditions to be included in communications contracts, such as the services provided, the minimum service level, and the procedures used by the company for measuring network traffic.

EU Directive 2019/2161 (Omnibus Directive) was implemented in Italy on 18 March 2023 with Legislative Decree No. 26/2023, which entered into force on 2 April 2023, introducing new consumer protection measures in the Consumer Code including, inter alia, higher penalties for companies and widening the cases of unfair commercial practices. In particular, with specific reference to e-commerce, the legislation introduced by Legislative Decree No. 26/2023 imposes the obligation to:

- clearly indicate, in marketplaces, the entity – professional or private – that offers products for sale, bearing in mind that, in the case of private individuals, consumer protection rules will not apply;
- to inform about the main parameters governing the classification of products, whenever the possibility of searching for products offered by different professionals is offered (this obligation, however, does not apply to providers of online search engines); and
- to ensure the reliability of product reviews.

Law stated - 10 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

Net neutrality is regarded as a fundamental principle recognised by AGCOM to ensure democratic internet service provision. Net neutrality is regulated by Regulation (EU) 2015/2120, and in Italy, the competent Authority issued specific Resolution No. 348/18/CONS concerning the net-neutrality regulation. Several legislative discussions have resulted in the Declaration of Internet Rights of 14 July 2015 approved by the Italian parliament, a document consisting of 14 sections and conceived as a guideline to drive an evolutionary interpretation of the existing provisions and to serve for any legislative developments.

Article 4 of Law No. 167/2017, raised the maximum penalty that can be imposed by AGCOM, in the case of a violation of net neutrality, to a limit of €2.5 million.

In compliance with the Body of European Regulators for Electronic Communications' guidelines, AGCOM published the 2024 report including the activities carried out concerning net neutrality. The report highlights AGCOM's commitment to ensuring open and non-discriminatory Internet access, in line with Regulation (EU) 2015/2120.

The document outlines AGCOM's monitoring and regulatory activities, including oversight of internet service provider practices, transparency in traffic management, and protection of user rights. It also describes international cooperation with BEREC (Body of European Regulators for Electronic Communications), an organisation that brings together national regulatory authorities from across Europe to promote consistent regulation of electronic communications. The report emphasises the importance of regulation in fostering a fair and innovative digital environment.

The resolution concerning the abolition of net neutrality in the United States, taken by the Federal Communications Commission on 14 December 2017, does not seem to have influenced the activity of the Italian legislator yet. On the other hand, the advent of 5G connectivity may be a game-changer as it will be necessary to understand if the innovative capacity of the network is inextricably linked to its free accessibility or not.

Law stated - 10 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

No specific legislation or regulations have yet been enacted in Italy concerning digital platforms.

In any case, the following legislation may apply to various aspects of the digital platforms:

- the e-commerce regulation provided by the E-commerce Decree;
- the Consumer Code and the data protection rules provided by the GDPR; and

- the Data Protection Code.

Moreover, the Italian Competition Law (Law No. 118/2022) introduced a provision specifically referred to digital platforms consisting in a relative presumption of economic dependence in the event that an enterprise uses the intermediation services provided by a digital platform that plays a decisive role in reaching end users or suppliers, including in terms of network effects or data availability.

In addition, Regulation (EU) 2019/1150, in force in EU member states since July 2020, outlines the relationship between business users of online intermediation services (marketplaces) and search engines.

The purpose of this Regulation is to guarantee greater transparency in the contractual terms applied to business users by, among others, the big players of the network. The target of the Regulation is the relationship of dependence that business users have on these large online players to offer their goods and services to consumers, which indirectly affects consumers who may not be able to enjoy balanced offers. The Regulation is directly applicable in EU member states and, so far, Italy has issued no specific rules regarding its implementation. By 13 January 2022, and subsequently every three years thereafter, the European Commission shall evaluate this Regulation and report to the European Parliament, the European Council and the European Economic and Social Committee.

On 27 October 2022, the DMA was published in the EU's Official Journal. The DMA regulates the activities of major digital platforms in the EU market, and it applies to gatekeepers, namely, companies offering online intermediation services (including search engines, social networks, messaging and video sharing). Eligible gatekeepers are suppliers that:

- have a size that has an impact on the internal market (assessed on the basis of turnover and capitalisation thresholds);
- are in control of important access for business users to end consumers; and
- have an established and durable position.

The designation as gatekeepers is made by the EU Commission, following a notification from the companies concerned, or acting ex officio. Under the DMA, specific and circumscribed obligations are imposed on the operators of platforms qualified as gatekeepers.

The Regulation (EU) 2022/2065 (Digital Services Act – the DSA) governs digital platforms, imposing specific obligations to ensure online safety, user protection, and transparency in practices. Platforms must remove illegal content, provide clear information about moderation and advertising policies, and ensure reporting mechanisms for users. In Italy, AGCOM is responsible for implementing the DSA, which also covers digital intermediary platforms (such as social media and search engines). The DSA requires platforms to protect minors, prevent the spread of harmful content, and provide quick remedies in case of user rights violations. The Act applies to all providers of intermediary services, as of 17 February 2024. A key provision of this framework is the creation of so-called 'trusted flaggers', as outlined in article 22 of the DSA. These are organisations recognised for their specialised knowledge in identifying illegal online content. Due to their reliability, the DSA grants preferential treatment to notifications they send to online platforms under article

16. Recently, on 22 January 2025, AGCOM appointed the first trusted flagger in Italy, the company Argo Business Solutions Srl. The qualification was granted in relation to issues concerning the violation of intellectual property rights and other commercial rights, as well as combating online scams and fraud. As a trusted flagger, Argo Business Solutions will be responsible for reporting illegal content to online platforms, which will be required to assess such reports promptly and effectively.

Law stated - 10 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

Since 2015, Italy has been executing the ultra-broadband strategic plan (UBP) to develop an ultra-broadband network across all Italian territory and create a public telecommunications infrastructure in coherence with the purposes of the European Digital Agenda. The Ministry acts through its in-house company (Infratel Italia Spa) whose mission is to implement the infrastructure development schemes throughout the country, with a particular focus on the development of an ultra-broadband network and Wi-Fi public-services connection.

The UBP is part of the wider Italian Ultra-Broadband Strategy – approved by the government in March 2015 – which intends to reduce the existing market and infrastructure gap through the creation of conditions that are more favourable to the integrated development of fixed and mobile telecommunications infrastructure. Such strategy represents the reference national framework for any public initiative supporting the development of ultra-broadband networks in Italy.

The strategy is implemented through state aid (national and EU funds alike), approved by the European Commission. Moreover, on 11 February 2016, the Council of Ministers and the Conference of the Regions approved the 'Framework agreement on the developing of the NGA as European target 2020', allocating €3 billion to the project, subdividing the funds to the regions, according to their population, and strengthening the management of the project.

The intervention is intended to build a publicly owned network that will be made available to all operators willing to provide services in favour of the population and undertakings.

On 6 July 2023, the Interministerial Committee for Digital Transition approved the Ultra Broadband (BUL) Strategy 2023–2026. This strategy aims to address critical gaps in the BUL value chain, identified through a detailed analysis of the current state of ultra-high capacity network creation and dissemination in Italy. The primary goal of the BUL Strategy is to bridge these gaps, ensuring seamless integration and enhancement of digital infrastructure across the country. By doing so, the strategy seeks to significantly strengthen the Italian telecommunications sector, providing a robust foundation for sustained economic growth. The anticipated economic benefits are substantial, with an estimated increase in GDP of €96.5 billion between 2020 and 2025, and €180.5 billion between 2020 and 2030. The strategy outlines several key interventions:

- enhancing public administration skills and sector research and development;
- strengthening monitoring, programming, and planning activities;
- building and enhancing network infrastructures;
- increasing network efficiency and resilience; and
- supporting demand and increasing take-up.

Law stated - 10 May 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

The provisions applicable to the communications sector are contained in the Data Protection Code and the resolutions of the Data Protection Authority. In particular, articles 121 to 132, a quarter of the Data Protection Code, apply to the processing of personal data connected to the provision of electronic communication services accessible to the public-on-public communications networks.

The retention of data in the terminal equipment of a user or the access to information already stored is permitted only on the condition that the user has given his or her consent after being informed in a simplified manner. This does not prohibit any technical archiving or access to information that has already been archived if it is solely aimed at transmitting a communication over an electronic communication network, or as strictly necessary for the provider of an information society service explicitly requested by the user to provide this service. Traffic data concerning users processed by the provider of a public communications network or an electronic communication service accessible to the public are erased or anonymised when they are no longer necessary for the transmission of electronic communications.

The provider of an electronic communications service accessible to the public may process user data to the extent and for the duration necessary for the marketing of electronic communication services or the provision of value-added services, only if the user to whom the data relates has previously expressed their consent, which is, however, revocable at any time.

The processing of personal data relating to traffic is only allowed for subjects authorised to process and operate under the direct authority of the provider of the electronic communication service accessible to the public or, as the case may be, of the provider of the public communications network that deals with billing or traffic management, analysis on behalf of customers, fraud detection or the marketing of electronic communication services.

If calling line identification is available, the service provider of electronic communication accessible to the public assures the calling user the possibility of preventing, free of charge and through a simple function, the presentation of the calling line identification, call by call.

Location data other than traffic data referring to users can be processed only if anonymised or if the user has previously expressed his or her consent, and is revocable at any time.

Without prejudice to the provisions of articles 8 and 21 of the E-commerce Decree, the use of automated call or call communication systems without the intervention of an operator for sending advertising material or direct sales or for carrying out market research or commercial communication is permitted only with the user's consent.

Furthermore, the provisions of the GDPR (articles 15 et seq) shall be integrated into the processing of data, including a data-protection impact assessment (article 35).

Concerning the security of the processing, article 32 of the GDPR shall apply, and therefore, providers of a publicly available electronic communications service shall, also through other entities entrusted with the provision of the service, implement technical and organisational measures appropriate to the risk involved.

The latter measures shall ensure that traffic and location data and other personal data stored or otherwise transmitted are protected against accidental or unlawful destruction, loss, alteration, or unauthorised disclosure of, as well as ensure the implementation of a security policy. Where the security of the service or personal data also requires the adoption of security measures to be taken concerning the network, the provider of the publicly available electronic communications service shall take such measures jointly with the provider of the network. In the event of failure to reach an agreement, at the request of one of the providers, the dispute shall be settled by the Communications Authority.

Furthermore, the provider of a publicly available electronic communications service shall inform the subscribers and, where possible, users, using clear, appropriate and adequate language concerning the category and age group of the subscriber, with particular attention in the case of minors, if there is a particular risk of a breach of network security, indicating, when the risk is outside the scope of the measures to be taken by the provider described above, all possible remedies and the relative presumable costs. Similar information shall be provided to the Data Protection Authority and the Communications Authority.

At the end of March 2022, Italian Presidential Decree No. 26/2022 on the public register of oppositions (RPO) was published and repealed the Italian Presidential Decree No. 178/2010.

The RPO is a public registry where the contracting parties (those with a contract with a telco operator) are entitled to register their numbers to avoid being contacted for marketing purposes.

Pursuant to the Italian Presidential Decree No. 26/2022, it is possible to also include in the RPO the mobile phone numbers of the contracting parties or data subjects.

Therefore, the entity that is willing to run telemarketing activities shall consult the RPO before starting such activities and shall provide the list of the telephone numbers that it intends to contact.

Once registered before the RPO, the entity shall consult the RPO itself by accessing the relevant website.

Within the following 24 hours, the RPO shall return to the relevant entity with an updated and cleared list of telephone numbers that shall not be contactable.

The list is valid for 15 days only, to enable a continuous update of the RPO.

It is noteworthy that with the registration before the RPO, the consent of the contracting party shall be deemed withdrawn.

In any case, the contracting party can withdraw the right to object only against one or certain operators or companies.

The Data Protection Authority approved the Code of Conduct for telemarketing and teleselling activities with resolution no. 70 dated 9 March 2023, and accredited the Monitoring Body (MoB) of the Code with resolution no. 148 dated 7 March 2024 (Official Gazette no. 73 dated 27 March 2024). MoB is an independent body charged with verifying adherents' compliance with the Code of Conduct and with handling the resolution of complaints.

The companies that adhere to the Code will undertake to adopt specific measures to guarantee the correctness and legitimacy of data processing carried out throughout the telemarketing chain, such as the collection of specific consents for individual purposes (marketing, profiling, etc), giving specific and precise information to the persons contacted on the purposes for which their data are used, and ensuring the full exercise of the rights provided for by the privacy legislation.

Law stated - 10 May 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

From a local standpoint, two main pieces of legislation on cybersecurity are to be noted:

- NIS2 framework; and
- Cybersecurity Perimeter.

On 27 December 2022, the NIS2 Directive, which updates and succeeds Directive (EU) 2016/114 on the security of network and information systems (the NIS Directive), was published in the EU's Official Journal and transposed in Italy by virtue of Legislative Decree No. 138/2024

The main innovation of the NIS2 Directive is its wide area of application, which is extended to medium and large companies operating in further sectors such as, inter alia:

- cloud computing;
- data centres;
- content delivery network providers;
- electronic communication services; and
- electronic communication networks.

The scope of the Directive is extended to the entire information and communications technology (ICT) infrastructure of entities, categorised as essential and important based on the criticality of their activities and the sector in which they operate.

The companies concerned shall implement an appropriate risk assessment process for the management of potentially malicious cyber events.

The NIS2 Directive also envisages new stringent reporting requirements in the event of a cyber incident to be fulfilled by notifying the CSIRT (cyber security incident response team) of all incidents likely to cause impacts of a 'significant' nature.

Differently from the past, where reporting had to be done 'without undue delay' (see the NIS Directive), the NIS2 Directive provides for a more circumscribed, comprehensive and timely reporting process. In this sense, it provides for:

- an early warning period of within 24 hours from the knowledge of the incident (the sending of the 'early warning');
- a notification within 72 hours of knowledge of the incident, updating – if necessary – the information in the early warning; and
- a final report within one month from the transmission of the notification, completing the reporting process.

NIS 2 Directive was implemented in Italy by virtue of Legislative Decree No. 138/2024 (NIS2 Decree), which, by repealing Legislative Decree No. 65/2018 (NIS Decree), establishes measures aimed at ensuring a high level of cybersecurity at the national level. An interim period is foreseen between the implementation of the NIS2 Decree and the NIS Decree, which safeguards the partial application of the latter until the NIS2 Decree requirements become fully enforceable.

With reference to the Cybersecurity Perimeter, five implementing decrees are provided to fully implement the architecture of the Perimeter. The first implementing decree was fully effective from 5 November 2020 (Presidential Decree No. 131/2020) and defines the criteria for identifying the entities included in the Perimeter and the obligations imposed on them to safeguard national security. The list of entities included in the Perimeter has already been drawn up, with about 100 entities involved, but was not published for national security reasons.

Nonetheless, the sectors in which to identify, as a matter of priority, in relation to public and private entities carrying out functions with a significant impact on national security include, among others, telecommunications, digital services and critical technologies.

Furthermore, Presidential Decree No. 131/2020 imposes several obligations on the entities within the Perimeter to ensure a high level of security.

First, entities must prepare, and annually update, the list of their ICT assets and must then identify the ICT assets needed to perform the essential function or service, to:

- assess the impact of an incident on the ICT asset, in terms of its operability and the compromise of data availability, integrity or confidentiality; and
- assess dependencies with other networks, information systems, IT services or physical infrastructures belonging to other subjects.

Finally, entities must identify the ICT assets that, in the event of an incident, would cause the total interruption of the essential function or service.

The second implementing Decree on notifications of incidents affecting networks, information systems and information services, as well as security measures, is Presidential Decree No. 54/2021. This Decree identifies the procedures, modalities and terms by which the National Assessment and Certification Centre (CVCN) and the Assessment Centres of the Ministries of Interior and Defence (CV) carry out assessments on the acquisition, by the entities included in the Perimeter, of ICT technologies and software – including 5G technology – that could present vulnerabilities and therefore expose them to cyber risks.

The latter Decree provides that, before the launch of award procedures or the conclusion of supply contracts, entities included in the Perimeter must notify the CVCN or the CV. Subsequently, the procedure is divided into three phases:

- preliminary assessments;
- preparation for the execution of tests; and
- execution of hardware and software tests.

The third implementing Decree, fully effective from 8 May 2021 (Presidential Decree No. 54/2021 of 5 February 2021), focuses on the procedures and terms for assessments by the CVCN and the CVs on products being acquired by entities included in the Perimeter.

The latter Decree also establishes the criteria for identifying the supply objects falling within the categories to which the assessment procedure applies.

Indeed, the categories of ICT goods, systems and services subject to the assessment by the CVCN or the VCs are identified based on the execution or performance of the following functions:

- switching or protection against intrusion and detection of cyber threats in a network, including the application of security policies;
- command, control and implementation in an industrial control network;
- monitoring and configuration control of an electronic communication network;
- network security concerning the availability, authenticity, integrity or confidentiality of services offered or data stored, transmitted or processed;
- authentication and allocation of the resources of an electronic communication network; and
- implementation of an IT service through the configuration of an existing software program or the development, in part or in full, of a new software program, constituting the application part relevant to the provision of the IT service itself.

The Decree of the President of the Council of Ministers, 15 June 2021, was the fourth implementing the Perimeter, identified the categories of networks, information systems and IT services for which it will be necessary to notify the CVCN.

The entities included in the Perimeter will notify the commencement of a technology acquisition procedure together with a risk assessment.

The fifth implementing Decree – Decree of the President of the Council of Ministers, 18 May 2022, No. 92, defined the criteria for the accreditation of laboratories responsible for

verifying the security conditions in the procurement of products, processes and services for networks, information systems and IT services.

Law stated - 10 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

On 7 October 2024, Legislative Decree No. 144 was published in the Official Gazette, aligning national regulations with the provisions of the Data Governance Act (Regulation (EU) 2022/868). The Decree came into effect on 25 October 2024.

The Agency for Digital Italy (AgID) has been designated as the competent authority for managing the notification procedure for data intermediation services and for registering data altruism organisations. Additionally, AgID is expected to work in close and loyal cooperation with the following authorities: the National Cybersecurity Agency (ACN), the Competition and Market Authority (AGCM), and the Data Protection Authority (Garante). To facilitate this, AgID can enter into specific, non-onerous collaboration agreements with these authorities.

Regarding sanctions, AgID is authorised to impose administrative fines ranging from a minimum of €10,000 to a maximum of €100,000, or, for companies, up to 6 per cent of the total worldwide annual turnover of the previous financial year. Big data often includes personal data and, in many cases, it is not possible to separate these data from non-personal data; therefore, as highlighted by the Data Protection Authority in the fact-finding survey on Big Data of February 2020, the privacy risks derived from the use of big data are different:

- the processing of personal data outside the purposes for which it was collected;
- the use of incorrect or outdated information;
- discrimination or prejudice against certain individuals or groups resulting from the application of certain profiling algorithms; and
- the processing of personal data above what is necessary to process them.

Law stated - 10 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

Some localisation requirements are provided by:

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the Regulation for Digital Infrastructures and Cloud Services for Public Administration issued by the ACN, which provides that in some cases the data must be stored within the European territory;

- the Cybersecurity Perimeter;
- article 6(2) of the recent draft Law No. 1146/2024 on artificial intelligence (AI), which provides that AI systems intended for use in the public domain, with the exception of those deployed abroad in the context of military operations, must be installed on servers located on national territory, in order to guarantee the sovereignty and security of citizens' sensitive data; and
- the Digital Operational Resilience Act (Regulation (EU) 2022/2554) (DORA), as applicable to financial entities and their supply chain.

Certain limitations may apply concerning specific types of data.

By way of example, under article 39 of Presidential Decree No. 633/1972 (relating to the value added tax applicable to the sale of goods and services), any accounting document shall be retained through electronic archives and stored in a foreign country only to the extent that there are reciprocal assistance rights.

Law stated - 10 May 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

The Metaverse represents a new dimension of our era that is not yet entirely regulated. However, the regulation of a system in which physical, augmented and virtual reality converge, allowing users to interact with a computer-generated environment, is not easy to manage. With the implementation of Directive (EU) 2019/770, which refers to contracts for the supply of digital content and services, digital content is subject to stricter regulation to ensure the conformity of the digital content with the contract and the supplier's public statements. Furthermore, the metaverse represents a marketplace as various types of trade take place within such dimension and is the reason Regulation (EU) 2019/1150 was issued to promote fairness and transparency for commercial users of online intermediary services. This Regulation governs the relationship between the owners of platforms and business users who provide consumers with goods and services. In addition to these rules, the Omnibus Directive was implemented in Italy by virtue of Legislative Decree No. 26/2023, which entered into force on 2 April 2023 and it provides for certain relevant amendments and integration to the Italian Consumer Code, in particular providing – among other changes – for new information requirements on distance contracts, new conducts that could amount to misleading omission or practice, new sanction regime and also specific additional information requirements for contract concluded on online marketplaces.

Last year, within the context of AI, AGCOM took measures against ChatGPT (the AI platform developed by OpenAI). Specifically, on 30 March 2023, AGCOM ordered, with

immediate effect, the temporary limitation on the processing of Italian users' data. AGCOM highlighted the lack of:

- information to users and data subjects;
- legal basis for the mass collection and processing of personal data to train the algorithms of ChatGPT; and
- age verification that exposes children to receiving inappropriate answers (even if the service is aimed at users above 13 years of age).

AGCOM also flagged that the information made available by ChatGPT was sometimes inaccurate. AGCOM required OpenAI to provide within 20 days the evidence of the measures taken to implement what is requested and to provide any information deemed useful to justify the above violations, failing which OpenAI might be fined up to €20 million or up to 4 per cent of its annual global turnover.

Thereafter, on 13 April 2023, the European Data Protection Board (EDPB) launched a dedicated task force on ChatGPT 'to foster cooperation and to exchange information on possible enforcement actions conducted by data protection authorities'.

On 28 April 2023, in the formal press release of AGCOM, the latter announced that OpenAI sent it a letter describing the measures implemented to comply with the order issued by AGCOM on 11 April 2023. In particular, OpenAI expanded the information to European users and non-users, it amended and clarified several mechanisms and deployed amenable solutions to enable users and non-users to exercise their rights. Based on these improvements, OpenAI reinstated access to ChatGPT for Italian users. AGCOM acknowledges the improvements taken by OpenAI to reconcile technological advancements with respect for the rights of individuals and AGCOM hopes that OpenAI will continue its efforts to comply with GDPR provisions. In any case, AGCOM confirms that its investigation continues also with the task force set up by the EDPB.

On 29 January 2024, the Italian Data Protection Authority (Garante) notified breaches of data protection law to OpenAI. Following the temporary ban on processing imposed on OpenAI by the Garante on 30 March 2023, and based on the outcome of its fact-finding activity, the Italian DPA concluded that the available evidence pointed to the existence of breaches of the provisions contained in the EU GDPR. The Italian Garante will take account of the work in progress within the ad-hoc task force set up by the EDPB in its final determination on the case.

Moreover, on 8 March 2024, the Garante opened an investigation into the US company that recently announced the launch of a new AI model, which, according to the announcement, is able to create dynamic, realistic and imaginative scenes from short text instructions.

The Garante recently concluded the public consultation on data scraping. It focused specifically on the use of this technique by companies developing generative artificial intelligence systems for purposes of training related algorithms. As of today, the Garante has not published, even informally, any paper or guidelines on the topic.

Another relevant topic in communications regulation is one related to the development of ultra-broadband, which is also an essential prerequisite for the development of 5G. Decree-Law No. 22 of 1 March 2021 established the Inter-Ministerial Committee for Digital Transition chaired by the Minister for Technological Innovation and Digital Transition,

which coordinates the governance of Italy's ultra-broadband strategy Towards the Gigabit Society, approved on 25 May 2021. The strategy consists of various interventions, including the Italian 5G plan (for which €2,020 million of National Recovery and Resilience Plan resources have been allocated). Furthermore, with Resolution No. 67/22/CONS of 3 March 2022, the Communications Regulator adopted the 'Guidelines to identify the conditions of wholesale access to ultra-broadband networks receiving public contribution – integration for 5G networks', which are regulated by:

- general conditions;
- the minimum set of wholesale services to be provided by the beneficiary of the financed network;
- the pricing of those services; and
- the approval procedure of prices.

On 20 March 2025, the Italian Senate approved draft Law No. 1146/2024, a concrete step towards aligning national regulations with Regulation (EU) 2024/1689 (AI Act). The text, divided into six chapters, establishes that the research, development, adoption, and use of AI must respect the fundamental rights and freedoms guaranteed by the Constitution and EU law. General principles such as transparency, proportionality, security, data protection, privacy, accuracy, non-discrimination, gender equality, and environmental sustainability are indicated.

The text provides for the creation of a national governance system for AI, as well as a fund of €1 billion euros for investments in AI, cybersecurity, quantum technologies, and 5G telecommunications.

Specific areas of AI application are regulated, such as the labour market, data protection, minors' access to intelligent systems, and cybersecurity, imposing measures to ensure inclusion and accessibility for people with disabilities.

Coordinated by the Presidency of the Council of Ministers, the National AI Strategy guides public choices in technological, industrial, and educational fields, with periodic updates and involvement of businesses, universities, and research centres. AgID" and the ACN collaborate on support tools like regulatory sandboxes and initiatives to promote innovation and competitiveness.

Law stated - 10 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

Audio-visual media sectors are mainly governed by Legislative Decree No. 208/2021, namely, the Consolidated Law on Audio-visual Media Services (AVMS Code), which has implemented the Audio-Visual Media Service Directive (Directive (EU) 2018/1808 amending Directive (EU) 2010/13/EU (AVMS Directive) in Italy.

Decree No. 208 of 8 November 2021 reorganised the provisions of the Consolidated Audiovisual Media Act (CAMA), referred to in Legislative Decree No. 177 of 31 July 2005.

One of the aims of Decree No. 208/2021 is to adopt the national plan for the allocation of radio frequencies in analogue technique, taking into account the degree of development of radio broadcasting in digital technique.

Additionally, the main subject matter of Decree No. 208/2021 is the provisions on audiovisual media services, such as:

- the transmission of:
- television programmes, both linear and on-demand;
- radio programmes; and
- data programmes, including those with conditional access; and
- the provision of associated interactive services and conditional access services on any broadcasting platform, including audiovisual commercial communications and video-sharing platform services.

Decree No. 208/2021 applies to audiovisual and radio media service providers and radio concessionaires operating in Italy, which are those that:

- have their head office in Italy and editorial decisions on the audiovisual media service are taken in Italy;
- have their head office in Italy and editorial decisions on the audiovisual media service provided are taken in another EU member state or a third country, if a significant part of the persons employed in the performance of the audiovisual or radio media service activity linked to the programmes operate within Italian territory;
- despite having its head office in another EU member state or a third country, editorial decisions on the audiovisual media service provided are taken in Italy and a significant part of the persons employed in the performance of the audiovisual or radio media service activity are linked to the programmes operate within Italian territory;
- a significant part of the workforce involved in the pursuit of the audiovisual media service activity relating to the programmes operates both in Italy and in another EU member state if its head office is in Italy; and
- if it started its activity in Italy in compliance with the national legal system, maintaining over time a stable and effective link with the Italian economy.

To the already-existing prohibitions against incitement to hate and violence, the prohibition to commit public provocation to terrorist offences has been added. Moreover, Decree No. 208/2021 aims to ensure adequate protection of human dignity and minors in relation to audiovisual content and commercial communications by sharing platforms.

On 17 April 2024, Legislative Decree No. 50/2024 was published in the Official Gazette as a reform to Legislative Decree No. 208/2021. The system of programming and investment quotas in European and Italian works has been simplified, reducing obligations for European on-demand services (from 20 per cent to 16 per cent investment and from 3.5 per cent to 3 per cent of revenue). On the other side, the quota for recent Italian-language works

(produced within the last five years) has been increased from 50 per cent to 70 per cent. In addition, a new Interinstitutional Advisory Committee has been established, replacing the previous Media and Minors Committee, with a mandate to provide consultation and promote media and digital literacy.

Legislative Decree No. 44/2010 has simplified the provision of linear services, regulated the provision of non-linear services (eg, download and on-demand services), and introduced some limits concerning advertisement crowding, as well as specific dispositions for the protection of European works.

Legislative Decree No. 181/2021, which has implemented Directive (EU) 789/2019 and amended certain rules concerning television rebroadcasting rights.

Legislative Decree No. 177/2021, which has implemented the Directive (EU) 790/2019 on copyright and related rights in the Digital Single Market.

The two main institutional bodies in Italy for the media sector are the Italian Communications Authority (AGCOM) and the Ministry of Enterprises and Made in Italy (the Ministry). AGCOM is vested in all powers and responsibility for development and policymaking activities in connection with the provision of radio and audiovisual services. The Ministry has the power, among others, to grant licences, general authorisations and spectrum.

Law stated - 10 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

CAMA was aimed at protecting the media market as well as ensuring pluralism in the provision of relevant audiovisual services through the implementation of certain ownership restrictions for broadcasters. Article 51 of Decree No. 208/2021 replaces article 43 of CAMA and contains the provisions related to the protection of pluralism fixing certain thresholds of incomes, and taking into account the changed market conditions with the increasing presence of multinational platforms. Such restrictions should be applied regardless of the nationality of the broadcasters.

In its judgment of 3 September 2020 in *Vivendi SA v Autorità per le Garanzie nelle Comunicazioni* (Case C-719/18), the Court of Justice of the European Union (CJEU) found article 43 of CAMA contrary to EU law, because, although it is based on the general interest of protecting pluralism in the media, it entails a restriction of the freedom of establishment within the meaning of article 49 of the Treaty on the Functioning of the European Union.

To be compliant with the principles of such judgment, Decree No. 208/2021 provides an obligation for the companies to notify when thresholds are exceeded and a consequent detailed investigation carried out by AGCOM to verify the impairment of pluralism as set out in the provisions.

Concerning the cross-ownership of media companies, article 51, paragraph 3(c) of Decree No. 208/2021 provides for companies whose revenues exceed 8 per cent of the total revenues of the integrated system of communications and that, at the same time, have or acquire stakeholdings in companies publishing daily newspapers, except for companies publishing daily newspapers distributed exclusively by electronic means, to formally notify AGCOM, within 15 days from the deed transferring ownership or from the conclusion of the preliminary agreement between the parties of such context that constitute indications of a position of significant market power potentially detrimental to pluralism. AGCOM is in charge of issuing the authorisation for the transaction.

A further restriction concerns the acquisition by EU and non-EU parties of participation in media companies. Indeed, the golden power discipline also applies to such transactions (namely, foreign direct investment). The golden power regulation (Law Decree No. 21/2012) is a set of rules according to which the Italian government may exercise some veto rights in relation to certain corporate resolutions and (or) to share purchase agreements in specific economic sectors or for assets of specific sectors.

Law stated - 10 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Under Decision No. 353/11/CONS of AGCOM relating to the licensing of digital terrestrial radio and television broadcasting (the DTT Regulation), digital terrestrial television (DTT) network operators must have a general authorisation to operate a DTT network issued by the Ministry and must obtain the right to use the relevant radio frequency spectrum. The DTT Regulation provides for various requirements for DTT network operators, including the number of programmes to be broadcast, coverage requirements and, in particular circumstances, must-carry obligations.

Service providers must apply for a general authorisation before providing their services.

The broadcasting authorisation is issued by the Ministry for a maximum of 12 years, renewable for a successive period of equal duration upon request to be sent 30 days before the expiry date. Applications may be filed only by entities established in Italy, other EEA states or other countries applying reciprocal treatment to Italians willing to operate as broadcasters in such countries. No authorisation is required for the retransmission of programmes by broadcasters established and legitimately operating in countries that are signatories of the European Convention on Transfrontier Television. The Ministry decides within 60 days of the application.

Licences can be transferred to a third party if the latter meets the requirements provided by AGCOM's resolution governing the licence. The new licensee must communicate the transfer of the licence to the competent authority, which either authorises the assignment or communicates its own denial, based on the assignee's lack of compliance with requirements provided by the law (eg, if the assignee is based in a non-EU country that

does not apply reciprocity, namely, where an Italian company could not hold an equivalent licence).

In addition, any change of control of the licensee and any assignment of licence must be notified to AGCOM. AGCOM, before authorising the deal, assesses whether the transfer may lead to the creation of a dominant position in the relevant market, which could adversely affect pluralism.

Each broadcaster shall pay a one-off fee of €7,000.

The six-year renewable authorisation procedure for satellite broadcasters (including pay-TV channels) is provided by Decision No. 127/00/CONS of AGCOM. AGCOM has 60 days to decide on any application for satellite broadcasting or cable transmission.

The satellite broadcasting and cable distribution of television programmes are subject to a one-off fee of €6,027.

Law stated - 10 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

The broadcasting of European programmes is regulated by article 52 et seq of Decree No. 208/2021. Legislative Decree No. 50/2024 provided for the replacement of articles 52 to 57. The key changes include:

- more structured quotas for Italian works, especially recent ones and those produced by independent producers;
- increased mandatory investments, with clearly defined percentages and sub-quotas;
- guaranteed visibility for European works in on-demand catalogues (eg, dedicated sections, promotional requirements);
- enhanced role of AGCOM, with new powers for regulation, oversight, and monitoring; and
- clarified economic thresholds and criteria for exemptions, ensuring proportionality and flexibility.

Linear audiovisual media service providers shall reserve for European programmes a majority proportion of their transmission time. The time used for news, sports events, games, advertising, teletext and teleshopping services shall not be taken into account.

A sub-quota of the quota envisaged for European programmes is reserved for original Italian programmes, wherever they are produced, to the extent of at least half for the concessionaire of the public radio, television and multimedia service and at least one-third for other providers of linear audiovisual media services.

In the time slot from 6pm to 11pm, the concessionaire of the public radio, television and multimedia service reserves at least 12 per cent of broadcasting time, excluding the time allocated to news, sports events, television games, advertising, teletext and teleshopping services, for cinematographic and audiovisual works of fiction, animation, original documentaries of Italian origin, wherever produced.

Concerning foreign programmes, article 26 of Decree No. 208/2021 sets out that the authorisation released to the local broadcaster association includes the right to transmit in Italy foreign companies' programmes for a maximum of 12 hours per day. In the case of interconnection with satellite channels or foreign television broadcasters, this shall not take more than 50 per cent of the maximum time provided for the interconnection.

Law stated - 10 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Article 43 et seq of Decree No. 208/2021 regulates broadcast media advertising.

As a general rule, the advertising shall not be hidden or subliminal and shall maintain a sound level not exceeding that of the programmes. Moreover, the advertising shall be respectful of human dignity and diversity and shall not encourage behaviour that is harmful to the safety and protection of the environment. There are specific items for which advertising is forbidden, such as cigarettes, medicines and gambling, and also specific protection for minors.

Pursuant to article 44, the advertising shall be clearly identifiable and recognisable from the editorial content. News, feature films and films for television (excluding series, serials and documentaries) shall be interrupted by spots no more than every 30 minutes.

The broadcasting of advertising messages by the concessionaire of the public radio, television and multimedia service, with reference to each individual channel, the limit is set at 6 per cent, in the time slot between 6am and 6pm and in the time slot between 6pm and midnight, and 12 per cent in each hour. The advertising slots of pay-TV broadcasters shall not exceed a daily threshold of 15 per cent.

Regarding radio advertisements carried out by non-public broadcasters, the hourly threshold is equal to 20 per cent for national broadcasting, 25 per cent for local broadcasting and 10 per cent for national or local broadcasting by European broadcasters.

Legislative Decree No. 50/2024 also intervened in the field of advertising, extending the regulation of articles 43 et seq to radio media service providers.

Online advertising is regulated by Legislative Decree No. 206/2005 (the Consumer Code) and Legislative Decree No. 70/2003 (the E-commerce Decree). The Consumer Code specifically prohibits unfair trade practices, as well as misleading and aggressive marketing practices, while electronic commerce, identifies some information that the information society service provider must provide as well as the minimum requirements that any advertisement operator and any person making an online advertisement must comply

with. EU Directive 2019/2161 (Omnibus Directive) was recently implemented in Italy by virtue of Legislative Decree No. 26/2023, which entered into force on 2 April 2023 and which provides for certain relevant amendments and integration to the Consumer Code, in particular providing – among other changes – for new information requirements on distance contracts, new conducts that could amount to misleading omission or practice, new sanction regime and also specific additional information requirements for the contract concluded on online marketplaces.

It is provided that – in addition to the information requirements laid down for specific goods and services – commercial communications that are part of or constitute an information society service, must include, from the first time they are sent, clearly and unambiguously, a specific statement aimed at highlighting that:

- it is a commercial communication;
- the natural or legal person on whose behalf the commercial communication is made;
- it is a promotional offer such as discounts, premiums or gifts and the conditions for accessing it; and
- it is a promotional competition or game, if allowed, and the conditions for participation.

Law stated - 10 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

No regulations specify a basic package of programmes that must be carried by operators' broadcasting distribution networks. However, under article 13, paragraph 4 of Decree No. 208/2021, broadcasters providing content of 'particular value' shall have privileged access to the digital broadcasting network. Under Resolution No. 253/2004, contents of 'particular value' at the national or a local level are those containing, inter alia, a high educational value, news and facts, socio-economic, cultural and political context, and improvement of the relationship between the citizen and the public administration.

No particular mechanism is provided to finance this kind of obligation.

Law stated - 10 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

Italian Legislative Decree No. 44/2010, deriving from EU Directive 2007/65/EC, has modified, inter alia, the provision of the audiovisual non-linear services (video on demand).

It has introduced a minimum legal standard applicable to audiovisual linear services as well as to audiovisual non-linear services (eg, concerning the protection of minors and prohibition of hidden advertising). However, some specific provisions shall not apply to audiovisual non-linear services. The main example concerns advertising. Because the audience may easily avoid advertising, the daily threshold for the audiovisual non-linear advertising spots does not apply. Also, broadcasters may freely choose where to insert advertising spots.

Decree No. 208/2021, moreover, has implemented a specific regulation for video-sharing platform services. Pursuant to article 41, paragraph 7 of Decree No. 208/2021, the supervisory authority (the Communications Regulator) may restrict the free circulation of user-generated programmes and videos that are conveyed by a video-sharing platform whose provider is located in an EU member state and are directed to the Italian public, to protect the freedom of expression, prevent discrimination and hate speech.

Furthermore, Decree No. 208/2021 provides that all the providers of media services (including those through video-sharing platforms) have to comply with the provisions for the protection of minors laid down in the Media and Minors Self-Regulation Code.

Law stated - 10 May 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The switchover procedure in Italy started in October 2008. The complete switchover from analogue to digital television in Italy occurred on 4 July 2012.

The rules and procedure for the reallocation of radio frequencies freed up by the switchover were contained in Resolution No. 550/12/CONS of AGCOM. The television frequencies have been reallocated through the principle of the ‘higher economic offer’. In particular, the resolution provided for the allocation of 21 national multiplexes, which enable various signals to be combined into a common flow of data and the transmission of several digital terrestrial television services simultaneously. It was, in addition, provided that, at the end of the selection procedure, no operator could obtain more than five national multiplexes.

With two decisions dated 26 July 2017 (*Europa Way* and *Persidera*), the CJEU has ruled that the Italian switchover from analogue to digital terrestrial television was violating EU laws by failing to allocate one multiplex for each analogue channel.

Moreover, Italy had set a deadline of 30 June 2022 for the transition imposing that all TVs must gradually leave the frequencies allocated to telephone companies and can abandon Mpeg-2 video encoding and, to save bandwidth, broadcast their programmes in Mpeg-4 encoding. This procedure was completed on 21 December 2022 through the permanent switch-off of the Mpeg-2 video encoding system.

On 28 August 2024, the national multiplex 'Mux B', operated by the public service Rai, was effectively converted to the new DVB-T2 transmission standard and, for most of the HD channels carried, to HEVC (H.265) video coding. Rai was the first provider to switch to the

new standard. During 2025, the transition to the DVB-T2 should be completed by all the operators.

Law stated - 10 May 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

As a general principle, broadcasters shall ensure efficient use of the radio spectrum (article 50 of Decree No. 208/2021).

This means that they shall minimise the environmental impact, avoid risks to human health, and ensure that there is no interference with other broadcasters' spectrum.

Legislative Decree No. 50/2024 introduced article 5-bis, which mandates that AGCOM adopt the National Allocation Plan for frequencies designated for digital terrestrial television services. This plan identifies several UHF band frequencies in each technical area for local planning purposes, ensuring that at least one frequency covers no less than 90 perc ent of the area's population. This measure aims to provide transmission capacity to local audiovisual media service providers and ensure that there is no interference with other broadcasters' spectrum.

Law stated - 10 May 2025

Media plurality

26 | Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

Under article 5, paragraph 1 of Decree No. 208/2021, the Italian media services system shall promote media plurality, forbidding the creation or maintenance of positions against pluralism and ensuring the transparency of broadcasters' corporate assets (eg, establishing that the same person, or persons in a relationship of control or connection between them, may not at the same time be authorised to provide digital radio media services at the national and local level). Article 51 sets out the principle that it is forbidden to create dominant positions detrimental to pluralism and it also specifies the rules for the assessment by AGCOM.

Moreover, in the case of transfer of a licence, any change of control of the licensee and any assignment of licence must be notified to AGCOM. Before authorising the deal, AGCOM assesses whether the transfer may lead to the creation of a dominant position in the relevant market, which could adversely affect pluralism.

Law stated - 10 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

The EU Digital Services Act (DSA) aims to protect users online and to ensure freedom of expression. The major providers of such platforms shall be obliged to evaluate risks within their systems for public interests, fundamental rights, safety and public health. The DSA shall apply to all online intermediaries operating in the European Union, introducing graduated obligations based on the nature of the services and proportionate to the number of users, for balancing user protection with market and innovation needs.

Law stated - 10 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The main regulators that have a role in the regulation of telecoms and audio-visual media distribution are the following.

- The Italian Communications Authority (AGCOM) is the regulator and watchdog in charge of audio-visual media and electronic communications services. AGCOM grants licences and authorisations for public broadcasting, regulates the relationship between telecoms companies and settles disputes between operators or between operators and end users. AGCOM is also in charge of preventing online copyright infringements and was appointed as the national supervisory authority under Law Decree No. 123/2023 implementing Regulation (EU) 2022/2065 (the Digital Services Act) and the P2B Regulation (Regulation (EU) 2019/1150) in Italy.

- The Ministry of Enterprises and Made in Italy (the Ministry), which deals with electronic communications and audio-visual media, including, among others, allocating frequencies, the monitoring and control of the national radio spectrum, and managing the infrastructure programme for broadband. The Ministry is also in charge of the general authorisations for electronic communications networks and services, and issues the authorisations to operate digital terrestrial TV channels.

While AGCOM regulates both the communications and the broadcasting sector, the antitrust regulation pertains to the Italian Competition Authority (ICA). The ICA has exclusive competence over the enforcement of Italian competition rules in the telecoms and broadcasting sectors. AGCOM and the ICA entered into an agreement on 22 December 2016 for defining the modalities of their cooperation.

Moreover, the Data Protection Authority is the authority responsible for supervising the compliance of telecom operators with Legislative Decree No. 196/2003 (the Data Protection Code).

Last, the Italian National Cybersecurity Agency (ACN), is a government authority in charge of protecting national interests in the field of cybersecurity. Among other things, the ACN is entrusted with specific competencies in relation to the security of electronic communication networks.

Law stated - 10 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

Any act, decision or resolution of AGCOM or the ICA may be appealed, also regarding the merit of facts, to the Regional Administrative Court of Lazio by any individual or legal entity that has been directly affected by such act, decision or resolution. The Regional Administrative Court of Lazio's judgment may be appealed to the Council of State.

Law stated - 10 May 2025

Competition law developments

30 | Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

The past 12 months have seen a number of potentially significant mergers and acquisitions in the communications sector, as well as important measures in the media sector. Listed below are some of the most relevant trends.

- In 2024, TIM spun off its fixed network assets, transferring them to FiberCop SpA, which was acquired by the US investment fund KKR, with a minority stake held by the Italian Ministry of Economy and Finance. The operation was authorised by the European Commission on 30 May 2024, which found no competitive concerns, given the continued presence of other active players in the national wholesale access market (Open Fiber, Fastweb, and FiberCop itself). However, in December 2024, the Italian Competition Authority (AGCM) launched an investigation into the agreement between TIM and FiberCop to assess whether it contained provisions that may constitute a restrictive agreement in breach of article 101 TFEU.
- In December 2024, the AGCM approved, with remedies, the concentration between Fastweb and Vodafone Italia, which reduced the number of infrastructure-based operators in the fixed network market to three. The transaction also increased the level of concentration in the mobile communications markets, prompting AGCOM to examine potential downstream effects.
- Another significant intervention by the AGCM concerned Wind Tre's acquisition of Opnet's business unit, which included frequencies and fixed network infrastructure

used to provide fixed wireless access services. The operation, approved in May 2024, resulted in a rebalancing of spectrum holdings among mobile operators, though it did not produce any immediate competitive effects.

- On 22 January 2025, the AGCM sanctioned the Spanish company Socialwebsite SL, which operated through the website payperfan.it, for unfair commercial practices. The company was found to be selling fake social media interactions — such as followers, likes, and views — while presenting them as authentic user engagement. The AGCM deemed this conduct misleading under the Italian Consumer Code, as it was likely to distort consumers' economic decisions and harm fair competition. The decision forms part of a broader initiative by AGCOM to ensure transparency in the digital environment and combat online opinion manipulation.
- In April 2025, the AGCM made mandatory the commitments presented by Sky Italia regarding communications and procedures for cancelling subscriptions and downgrading, as well as the removal of packages, closing the proceedings initiated against the company without imposing any.

Law stated - 10 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The main laws that regulate the Japanese telecommunications industry are the Telecommunications Business Act, the Radio Act and the Wired Telecommunications Act. The Telecommunications Business Act stipulates secrecy of communications, entry and exit from the telecommunications business, regulations on charges and services, connection rules between carriers, a universal service system, etc. The Radio Act stipulates radio station licences, radio equipment, technical regulations conformity certification of specified radio equipment, radio operators, etc. The Wired Telecommunications Act stipulates the standards and use of wired telecommunications equipment. The regulatory agency for the telecommunications industry is the Ministry of Internal Affairs and Communications (MIC).

The major carriers in Japan's telecommunications business are Nippon Telegraph and Telephone Corporation (NTT) (including NTT EAST, NTT WEST and NTT DoCoMo), KDDI Corporation and Softbank Corp. Meanwhile, Rakuten Mobile, Inc has recently entered the mobile phone business.

The Foreign Exchange and Foreign Trade Act stipulates comprehensive restrictions on foreign ownership in Japanese corporations. The telecommunications business is also subject to foreign ownership restrictions under the Foreign Exchange and Foreign Trade Act, and if a foreigner acquires 1 per cent or more of the shares of a corporation in a national security-related industry, including the telecommunications business, prior notification to the government is required, in principle.

There is no comprehensive foreign ownership regulation in the Telecommunications Business Act, but NTT, which was originally a state-owned enterprise, has a communication network all over Japan, and has the largest market share among telecommunications carriers, is subject to the following foreign ownership regulations under the Act on Nippon Telegraph and Telephone Corporation (the NTT Act):

- foreign individuals, foreign governments and foreign corporations are prohibited from holding more than one-third of the voting rights of NTT Corporation (including through indirect ownership);
- foreign individuals are prohibited from serving as representative directors of NTT and its regional subsidiaries, NTT EAST and NTT WEST; and
- the proportion of foreign directors and auditors at NTT, NTT EAST and NTT WEST must remain below one-third of the total number of directors and auditors at each of their respective companies.

Also, according to the Radio Act, foreigners, foreign governments, foreign corporations, corporations represented by foreigners, corporations in which foreigners occupy more than one-third of officers, and corporations in which foreigners hold more than one-third of voting rights are not granted a radio station licence. However, radio stations of

telecommunications carriers are not subject to foreign ownership regulations regarding radio station licences under the Radio Act.

Law stated - 21 April 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

Business operators that provide services intermediating other persons' telecommunications, such as fixed phone companies, mobile phone companies, satellite phone service companies, internet service providers, email service providers and messaging service providers, must perform the entry procedure under the Telecommunications Business Act. The type of entry procedure depends on the scale of the telecommunications line facilities (eg, fibre optics and base stations). If a business operator installs telecommunications line facilities on a scale exceeding the threshold, the business operator must be registered after the screening process performed by the MIC. If a business operator installs telecommunications line facilities on a scale below the threshold or does not install telecommunications line facilities (including over-the-top service providers), it only has to file a notification with the MIC. When a foreign business operator intends to be registered or make a filing as a telecommunications business operator, it must designate a domestic representative. The validity period and licence fee are not determined regarding the registration or notification of telecommunications services.

To establish and operate a radio station, a radio station licence from the MIC is generally necessary. To obtain the radio station licence, the applicant must first make an application to the MIC. If the applicant passes the document screening, the applicant obtains a provisional licence and constructs the radio station accordingly. If the radio station passes the inspection test after the construction, the applicant finally obtains a licence to operate the radio station. However, there are many exceptions to be exempted from or to simplify these procedures. For example, the applicant can obtain a radio station licence through simplified document screening procedures for certain radio equipment certified as complying with applicable technical standards.

The licence period, usage fee and use conditions of radio station licences are dependent upon the categories of radio stations. In Japan, while there is still no pure spectrum auction system, certain spectrum bands for 5G have been allocated through the auction-like mechanism under which the evaluated price for the spectrum offered by the applicants is taken into account among other factors. Additionally, the amendment to the Radio Act was enacted on 25 April 2025 in order to allow spectrum auctions for wide-area, high-capacity communications using frequencies over 6 GHz.

A frequency is allocated for each type and purpose of wireless communications under the Frequency Allocation Plan made and published by the MIC. The frequency of each generation's mobile network and satellite networks are also allocated under the Frequency Allocation Plan.

As for public Wi-Fi services, registration or notification under the Telecommunications Business Act is necessary except for services ancillary to the original business of the

operator or services that are not for profit. Obtaining a radio station licence for the establishment and operation of the Wi-Fi system is not required as long as the services are provided by using apparatuses that meet the technical standards under the Radio Act and the technical standards compliance mark is attached thereto.

Law stated - 21 April 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

Any person who intends to establish a radio station under the Radio Act shall, in principle, obtain a radio station licence. Radio station licences specify certain matters such as the permitted use, the permitted frequency and antenna power, etc. As an exception, some wireless systems, such as 2.4GHz-band wireless local area networks, are permitted to operate without a radio station licence under certain conditions. Radio station licences are not freely transferable or assignable; however, they can be succeeded in certain cases such as through mergers of corporations.

Law stated - 21 April 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

In the Telecommunications Business Act, most rules are ex-post regulations but there are some ex-ante regulations.

As for universal services (eg, fixed telephone) and services that are provided by using bottleneck facilities and cannot be sufficiently substituted by other services, the providers of such services must notify the MIC in advance regarding the fixed terms and conditions stipulating the service conditions including the price. Also, the price-cap regulation applies to the services that have particularly significant impacts on the interests of users.

Companies designated by the MIC as business operators establishing major networks are the targets for ex-ante regulations regarding their fixed terms and conditions stipulating the connection fees and the connection conditions to connect the networks to other business operators' networks (namely, prior authorisation by the MIC for the fixed terms and conditions regarding fixed telecommunications, and prior notification to the MIC for the fixed terms and conditions regarding mobile telecommunications). Furthermore, the designated companies are obliged to keep accounts regarding the connection of networks.

Business operators that have dominant market positions (NTT EAST and NTT WEST for the fixed telecommunications market, and NTT DOCOMO for the mobile telecommunications market) are under special regulations such as a prohibition on the use or provision of other business operators' information acquired concerning the connection of

networks and unreasonably preferential or disadvantageous treatment of specific business operators.

NTT is subject to special regulations under the NTT Act such as the authorisation procedure for its business plan and the obligation to submit its financial statements, considering that NTT took over the capital of Nippon Telegraph and Telephone Public Corporation, which had a monopoly on the installation of domestic phone lines in Japan until 1985.

Law stated - 21 April 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

No general rules require either structural separation or functional separation between an operator's network and service activities. However, NTT EAST/WEST, which owns essential facilities, must implement certain functional separations, such as setting up firewalls between network development and service development.

Law stated - 21 April 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

Fixed phones, public phones and emergency calls are designated as universal services, whereas mobile phones are not. To allocate part of the costs of universal services, contributions named universal service fees are collected from mobile phone companies, fixed phone companies and internet protocol phone companies, and the contributions are distributed to NTT EAST and NTT WEST, who are the universal service providers. The amount of the contributions is between ¥2 to ¥3 per month per telephone number, and the contributions are passed on to the end users in most cases.

Certain fixed-line broadband services (fibre-to-the-home (FTTH), cable TV (CATV) and dedicated fixed wireless access) are designated as universal services under the amended Telecommunications Business Act, which came into effect on 16 June 2023. The amended Act establishes a fund derived from universal services fees collected from broadband service providers and distributes the contributions to support the maintenance of broadband networks in underpopulated areas.

Currently, the designated universal service providers are required to offer services nationwide, even in areas where other providers already offer the same type of services. However, in March 2025, the MIC submitted a bill to amend the Telecommunications

Business Act so that the designated universal service providers would only be required to operate in areas where no other providers offer comparable services.

Law stated - 21 April 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

Telecommunication numbers such as fixed phone numbers and mobile phone numbers are assigned to telecommunication service providers under the Telecommunication Number Plan outlined by the MIC. Any telecommunication service provider that intends to use telecommunications numbers shall, in principle, prepare a Telecommunication Number Use Plan and obtain an authorisation from the MIC. In the past, only major telecommunication service providers, such as fixed network operators (FNOs) and mobile network operators (MNOs), were subject to regulation; however, the amendment to the Telecommunications Business Act in 2019 extended regulations on telecommunication numbers to include fixed virtual network operators and mobile virtual network operators (MVNOs).

To address the increasing misuse of telecommunications numbers by malicious actors supporting fraud groups, the MIC submitted a bill in March 2025 to amend the Telecommunications Business Act. Key proposed measures include:

- disqualifying service providers that have been penalised for involvement in fraudulent activities from obtaining authorisation for a Telecommunication Number Use Plan; and
- requiring wholesale telecommunications service providers to verify that their retail partners have obtained the necessary authorisation and are expected to continue providing services.

For fixed phone numbers, only unilateral number portability from NTT EAST/WEST to other operators was previously available. However, as of January 2025, bilateral number portability between fixed-line service providers has been introduced, and the MIC has issued guidelines governing its implementation.

For mobile phone numbers, bilateral number portability is already required, and the MIC also provides guidelines requiring, among other things, that number portability fees are generally waived.

In 2023, the MIC amended these guidelines to require mobile phone service providers to implement a one-stop system that allows customers to complete the portability process by contacting only the destination service provider.

Law stated - 21 April 2025

Customer terms and conditions

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8 Are customer terms and conditions in the communications sector subject to specific rules?

When telecommunications business operators or their sales agencies conclude contracts with consumers of mobile phone services or fibre-to-home services, etc, they are obliged to explain the outline of the terms and conditions in advance and deliver a document clarifying the terms and conditions, and they are prohibited from misrepresenting and persistently soliciting, etc. Within an eight-day period, consumers can terminate contracts regarding mobile phone services or fibre-to-home services, etc, by only having to pay necessary costs such as usage fees until then and construction costs. In addition, they are obliged to take measures enabling users to terminate contracts promptly and may not charge cancellation penalties exceeding one month's service fee.

Also, the following are obliged to separate communication service fees and the price of a device and are prohibited from performing excessive enclosures such as prolonged minimum contract periods and expensive cancellation penalties (article 27-3 of the Telecommunications Business Act):

- MNOs;
- group companies of MNOs;
- MVNOs whose market shares exceed 4 per cent; and
- sales agencies of the above entities.

Law stated - 21 April 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

Article 6 of the Telecommunications Business Act provides that:

> Telecommunications business operators must not engage in unfair and discriminatory treatment concerning the provision of telecommunications services.

Furthermore, the behaviour of analysing packets regarding telecommunications for zero-rating services or bandwidth throttling may violate the secrecy of communications (article 4 of the Telecommunications Business Act.)

The legality of controlling or prioritising the type or source of data delivered by internet service providers is judged by analysing whether such behaviour violates the aforementioned rules on a case-by-case basis.

Net-neutrality issues are being discussed in the Study Group on Network Neutrality held by the MIC, and this study group published an interim report in April 2019.

Based on this interim report, the Guidelines on the Application of the Telecommunications Business Act for Ze
ro-Rating Services were developed, and the Guidelines for the Interpretation of Bandwidth Control (in Japanese) were revised. These guidelines provide case-by-case analyses regarding whether or not zero-rating services and bandwidth control violate the Telecommunications Business Act.

Law stated - 21 April 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

The Act on Improving Transparency and Fairness of Digital Platforms was enacted on 27 May 2020 and came into force on 1 February 2021. This Act obliges platform service providers that have a high need to improve their transparency and fairness (Specified Digital Platforms) to disclose information regarding the terms and conditions of their transactions, establish procedures and systems to promote mutual understandings with their users who provide goods or services using the platforms and submit annual reports. Only online malls and application stores with especially high sales volumes were designated as Specified Digital Platforms at the time of the enforcement, but the government expanded the subject of these regulations to large-scale digital advertising platforms in October 2022.

Moreover, the Act on the Protection of Consumers Who Use Digital Platforms for Shopping was enacted in 2021 and came into effect on 1 May 2022. This Act provides that the Minister of Consumer Affairs can request digital platform service providers like online malls to delete the exhibition of items that have significant misrepresentations in important points and that consumers can demand digital platform service providers to disclose information of sellers to the extent necessary to exercise claims (eg, claims for damages).

The amendment to the Act on the Limitation of Liability for Damages of Specified Telecommunications Service Providers and the Right to Demand Disclosure of Identification Information of the Senders was enacted on 17 May 2024 and came into effect on 1 April 2025. The Act was renamed the Act on Measures Against Rights Infringement, etc. Arising from Distribution of Information by Specified Telecommunications (commonly referred to as the Information Distribution Platform Act). In order to deal with illegal and harmful information on the Internet, such as defamation, the amended Act obliges large-scale platform operators to take measures, including speeding up their response to removal requests and making the operational status transparent.

The Act on Promotion of Competition for Specified Smartphone Software was enacted on 19 June 2024 and will come into effect within 18 months of that date. Under the Act, the Japan Fair Trade Commission (JFTC) can designate providers of specified software (mobile operating systems, application stores, browsers and search engines) that exceed a certain scale. On 31 March 2025, the JFTC designated Apple Inc, iTunes KK, and Google LLC as such providers. Designated providers are prohibited from engaging in certain anticompetitive practices and are obliged to take certain measures. For example,

designated app store operators may not prevent third-party providers from offering their own app stores.

Law stated - 21 April 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

There are no specific regulatory obligations that are particularly applicable to NGA networks.

The Japanese government provides subsidies to entities that intend to develop fibre optic in certain areas such as rural areas, to improve the spread of broadband access.

Certain fixed-line broadband services, such as FTTH, CATV and dedicated fixed wireless access, are deemed a universal service under the amended Telecommunications Business Act, which came into effect on 16 June 2023. The amended Act establishes a fund derived from universal services fees collected from broadband service providers and distributes the contributions to support the maintenance of broadband networks in underpopulated areas.

Law stated - 21 April 2025

Data protection

12 Is there a specific data protection regime applicable to the communications sector?

Data protection in Japan is regulated by the Act on the Protection of Personal Information (APPI). The APPI is in line with the eight principles under the Organisation for Economic Co-operation and Development Guidelines and stipulates the acquisition and use of personal information, security management measures, provision to third parties, and the rights of individuals. The Personal Information Protection Commission (PPC) supervises the handling of personal information based on the APPI. Also, regarding the specific interpretation and operation of the APPI, the PPC has published guidelines on the protection of personal information (general rules, rules on the provision to third parties in foreign countries, rules on confirmation and recording obligations when providing to third parties, rules on pseudonymously processed information and anonymously processed information, rules on accredited personal information protection organisations) and frequently asked questions.

Also, regarding the protection of personal information in the telecommunications business, the MIC and the PPC have jointly published Guidelines for the Protection of Personal Information in the Telecommunications Business that stipulate the basic matters that telecommunications carriers should comply with to properly handle personal information, and the purposes of use, ensuring accuracy, retention period, safety management

measures and restrictions on the provision to third parties regarding personal information. The guidelines also stipulate the handling of information specific to the telecommunications business, such as communication history, usage details, caller information, location information and non-payer information. The PPC is currently considering amendments to the APPI, including the introduction of administrative monetary penalties.

Also, the Telecommunications Business Act stipulates the prohibition of censorship of communications and secrecy of communications during the handling of telecommunications carriers.

Moreover, the following new regulations regarding data protection were introduced under the amended Telecommunications Business Act, which came into effect on 16 June 2023:

- large-scale telecommunications service providers (including search engine operators and social media providers) must develop internal rules, publish their policies, conduct self-assessments, and appoint an executive manager to legally and properly handle user information; and
- when telecommunications service providers transmit user information externally from the users' devices, including via cookies, they must take any one of the following measures:

- notify the users of the transmission;
- publish information regarding the transmission;
- obtain consent from the users; or
- provide an opt-out method.

Law stated - 21 April 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The Basic Act on Cybersecurity stipulates Japan's basic policy on cybersecurity as well as the fundamental responsibilities of the national and local governments. Under the Basic Act on Cybersecurity, critical infrastructure operators, including certain telecommunications carriers, shall endeavour to voluntarily and proactively secure cybersecurity and to cooperate with cybersecurity measures implemented by the national and local governments.

Under the Telecommunications Business Act, telecommunications service operators shall have obligations to protect the secrecy of telecommunications, and to maintain and operate certain telecommunication facilities in compliance with the applicable technical standards established by the MIC. These technical standards include certain requirements for network security.

Moreover, the Economic Security Promotion Act was enacted on 11 May 2022 and came into effect in a phased manner. This Act stipulates a pre-screening system for

the installation of critical infrastructure by important providers (including information and communications technology companies) and the consignment of the maintenance and management thereof. The pre-screening for critical infrastructure came into effect on 17 May 2024.

The Diet is currently discussing the establishment of the Act on the Prevention of Damage by Unauthorised Acts on Important Computer Systems and amendments to the related legislation, with the aim of introducing active cyber defence (ACD) in alignment with the strategies of the United States and European countries. The proposed bill would allow the government to utilise and analyse telecommunications data, such as IP addresses exchanged with suspicious foreign parties which are collected by core infrastructure operators. This would help in understanding the actual state of cyber-attacks. The amendments would also authorise the police and Self-Defence Forces to take preventive measures against serious harm caused by cyber-attacks.

Law stated - 21 April 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

In the past, there was no specific law regulating big data, but this changed with the revision of the APPI in 2015, which created a system for anonymously processed information. Under the revision, by applying a certain amount of anonymous processing to personal information so that a specific individual cannot be identified and personal information cannot be restored, it becomes possible to utilise it as big data. Also, the 2020 revision of the APPI, which came into force in April 2022, created a system for handling pseudonymously processed information. Under this new system, personal information may be utilised in-house as big data if it has been processed such that a specific individual cannot be identified unless the data is collated with other information (eg, original data).

In 2016, the Basic Act on the Advancement of Public and Private Sector Data Utilisation was enacted, and the Basic Plan of Public-Private Data Utilisation was formulated under this Act. Currently, the smooth distribution of data is being encouraged through this legislation by promoting open data and the construction of a mechanism for individual involvement in data distribution.

After that, in 2018, the Unfair Competition Prevention Act was amended to clarify that illegal acquisition, use and disclosure of certain big data are subject to injunction and compensatory damages. In 2018, the revision of the Copyright Act clarified that certain use of big data does not infringe copyright under certain circumstances, and the use of big data is being promoted. Also, the utilisation of big data is being promoted in various fields, such as promoting the utilisation of big data in the medical field through the Next Generation Medical Infrastructure Act. On the other hand, in 2019, the Japan Fair Trade Commission published the Idea of Antitrust Act Regarding Abuse of Dominant Bargaining Position in Transactions Between Digital Platform Operators and Consumers who Provide

Personal Information, etc, to ensure the proper use of big data from the perspective of the Antitrust Act.

Law stated - 21 April 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

There are no general laws or regulations requiring data to be stored in Japan. Generally speaking, the APPI provides restrictions on the cross-border transfer of personal data. Specifically, a business operator that intends to transfer personal data to any third party overseas, is required, in principle, to obtain the prior consent of the data subject. As an exception, a business operator can transfer personal data to a third party outside of Japan without the data subject's prior consent if either:

- a receiving country is recognised by the PPC as having a sufficient level of protection (currently, only EU member states, Iceland, Liechtenstein, Norway and the United Kingdom are recognised); or
- the third party who is a recipient of personal data has implemented protective measures at the same level as required by the APPI.

The recent amendment to the APPI, which came into effect on 1 April 2022, has enhanced the regulations on the cross-border transfer of personal data. For example, a business operator who intends to obtain prior consent from the data subject for the cross-border transfer of his or her personal data must provide the data subject with certain information such as the name of the receiving country and an outline of personal data laws of such receiving country.

Moreover, under the amended Telecommunications Business Act, which came into effect on 16 June 2023, large-scale telecommunications service providers (including search engine operators and social media providers) must develop internal rules and publish data processing policies, which contain information about applicable foreign systems affecting proper handling of user information.

Law stated - 21 April 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

In March 2024, the MIC submitted a bill to amend the NTT Act and the Telecommunications Business Act. The main focus of the amendment is to update the structural and behavioural regulations specifically applicable to NTT to reflect current market conditions.

NTT, which had been a public company monopolising the domestic telecommunications market, was privatised in 1985, and has since been regulated under the NTT Act, which imposes structural rules specific to NTT and its group companies, such as the requirement that the government hold at least one-third of NTT's shares. In addition, NTT group companies are subject to special business obligations under the Telecommunications Business Act to ensure a level playing field with their competitors.

Between 2023 and early 2025, the Information and Communications Council, an advisory body to the MIC, reviewed whether the NTT Act should remain in force. While NTT advocated for its repeal, arguing that there is no longer a justification for imposing special structural obligations, its competitors maintained that NTT continues to possess essential facilities and should therefore remain subject to differentiated regulation.

The Council ultimately concluded that the structural and behavioural regulations specific to NTT should, in principle, be maintained, though some provisions should be revised to reflect current market conditions. Based on this conclusion, in March 2025, the MIC submitted a bill to amend the NTT Act and the Telecommunications Business Act. Key proposed changes include:

- the relaxation of universal service obligations imposed on NTT EAST and NTT WEST; and
- the elimination of the restriction limiting NTT EAST and NTT WEST's scope of their regular businesses with intra-prefectural telecommunications.

In addition to the provisions related to NTT, the bill seeks to amend the Telecommunications Business Act by introducing the following measures:

- granting priority land use rights to infrastructure-sharing service providers; and
- revising rules on telecommunications numbers to help prevent fraud.

The amendment to the Radio Act was enacted on 25 April 2025, which includes:

- the introduction of spectrum auctions for wide-area, high-capacity communications using frequencies above 6 GHz;
- digitisation of radio station licences; and
- revision of radio usage fees to better reflect current usage trends, along with the introduction of subsidies to strengthen radio station infrastructure.

Law stated - 21 April 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The main laws that regulate the Japanese media industry are the Broadcasting Act, the Telecommunications Business Act, the Radio Act and the Wired Telecommunications

Act. The regulatory agency for the media industry is the Ministry of Internal Affairs and Communications (MIC).

The Broadcasting Act, which is central to the broadcasting field regulations, stipulates editing standards for broadcast programmes, the establishment and operation of NHK (Japan's public broadcaster), certification and registration of broadcasters and restrictions on foreign ownership, among other things. In Japan, broadcasting and communication are distinguished and different regulations are applied. Broadcasting in Japan includes terrestrial television broadcasting, satellite television broadcasting (broadcast satellite and communications satellite), wired television broadcasting, wireless and wired radio broadcasting and internet protocol multicast broadcasting, all of which are subject to the Broadcasting Act. However, general internet programme distribution, which is typically on-demand streaming, is not subject to the Broadcasting Act and may be subject to information and communication regulations such as the Telecommunications Business Act, depending on the circumstances. In the field of communications, the secrecy of communications is guaranteed, but in the field of broadcasting, diversity of programmes and political neutrality are required due to their public nature.

The Broadcasting Act used to require local basic terrestrial broadcasters to broadcast original content for each region (namely, for each prefecture) to maintain the locality of the region, and this has been criticised for causing the financial conditions of local broadcasters to deteriorate. The Act was amended in 2023 to reduce the burden on local broadcasters to produce original local content and allow them to broadcast the same programme across multiple local regions under certain conditions. Additionally, it also allowed specified basic terrestrial broadcasters to enter into agreements with other basic terrestrial broadcasters within the same target regions for broadcasts and to jointly use relay station equipment. Given the background of the success of streaming services and young people's shift away from TV, it has become essential for local broadcasters to cut maintenance costs and facilitate effective operations.

Law stated - 21 April 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Under the Broadcasting Act, any of the following entities may not obtain approval for a basic broadcasting service:

1. a person who does not have Japanese nationality;
2. a foreign government or its representative;
3. a foreign corporation or organisation;
4. a corporation or organisation, any specified officer of which is a person outlined in (1) to (3); or
5.

a corporation or organisation in which 20 per cent or more of its voting rights are held by a person outlined in (1) to (3).

As to requirement (5), not only direct ownership but also indirect ownership may be taken into account for certain types of broadcasting.

There is no general regulation of cross-ownership between broadcasters and other media outlets such as newspaper publishers, while it is still prohibited for one group company to own all of the terrestrial television broadcasting, the radio broadcasting and the newspaper in the same area if there are no other mass media in such area.

In 2022, the Broadcasting Act was amended to reinforce the monitoring system for foreign ownership of broadcasters, including that:

- an applicant for a broadcasting service licence must declare certain items regarding the foreign ownership disqualification, including the number of shares of such applicant held by foreign entities, in its application;
- a broadcaster must notify regulators of any changes in certain items regarding the foreign ownership disqualification, including the amount of shares of such applicant held by foreign entities; and
- the regulatory authority may give a broadcaster who has breached the foreign ownership restriction an opportunity to remedy such breach before revoking its licence, depending on the circumstances.

The media plurality rules, in principle, prohibit the granting of basic broadcaster authorisation to the following entities:

- an existing basic broadcaster;
- a person who has control over another basic broadcaster; or
- a person controlled by any of the foregoing.

In other words, one person cannot conduct multiple basic broadcasting activities. However, there are some exceptions to this principle, which are outlined in the Ministerial Ordinance on Definitions of Specific Officers and Controlling Relationships Related to the Business of Basic Broadcasting and on Special Provisions of the Standards of Freedom of Expression (Media Plurality Ordinance), including broadcasting holding companies.

Law stated - 21 April 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Any person who intends to conduct broadcasting must, in principle, obtain both the licence of the broadcast station under the Radio Act and the approval under the Broadcasting Act (in the case of a basic broadcaster) or registration (in the case of a general broadcaster).

Under the Radio Act, a person who has submitted an application stating the necessary matters shall be granted a radio station licence if he or she satisfies certain requirements such as:

- the application does not violate the foreign ownership restrictions;
- the construction design conforms to the technical standards;
- the frequency allocation is possible; and
- the applicant has sufficient financial basis and technical capability to maintain the service (in the case of a basic broadcaster).

Depending on the type of radio station, the size of the basic transmitter and the application method, the application fee for the television broadcasting station is ¥8,600 to ¥167,800. A registration and licence tax is also imposed separately upon registration and the spectrum use fees are charged annually. The standard processing period for licences for radio stations is not specified and is determined on a case-by-case basis.

Approval under the Broadcasting Act is granted to a person who has submitted an application stating necessary matters after satisfying requirements such as:

- not violating foreign ownership restrictions or the media plurality rules;
- having the financial basis and technical capability sufficient to maintain the service; and
- having the broadcasting facilities conform to the technical standards.

On the other hand, registration is granted to a person who submits a written application to the Minister of Internal Affairs and Communications, except where there are grounds for refusal of registration, such as the fact that the approval or registration has been revoked or a fine or greater punishment has been imposed on the person due to a violation of the Radio Act or the Broadcasting Act in the past.

Law stated - 21 April 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

While there are no direct regulations, NHK must contribute to enhancing international goodwill and developing economic exchange with foreign countries by promoting accurate information on Japan through introducing the culture, industry and other factors surrounding Japan, etc, in the broadcasting or editing of programmes provided to foreign audiences.

Moreover, under the Broadcasting Standards outlined by the Broadcasting Ethics and Improvement Organisation (BPO), private broadcasting companies must consider differences in historical context, national situation, tradition and customs, etc, when they refer to foreign programmes or cover foreign situations.

Law stated - 21 April 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

In general, advertising in Japan is regulated under the Act against Unjustifiable Premiums and Misleading Representations that restricts any misleading representation (which portrays the relevant good or service as being significantly superior to that of the actual goods or services, or, contrary to the facts, significantly superior to those of other entrepreneurs, etc) being made to general consumers.

Under the Broadcasting Act, a broadcaster must ensure that recipients of the broadcasts can clearly identify advertising broadcasts as advertisements. Additionally, a basic broadcaster shall not include advertisements in any educational programmes for schools if it is deemed that they would impede school education. Also, NHK and the Open University of Japan (an accredited educational institution utilising broadcasting media to provide a wide range of people with learning opportunities) must not broadcast advertisements for any third party's products and services.

On top of that, the Broadcasting Standards outlined by the BPO set various voluntary standards such as:

- any representations must be based on facts and also be clear and plain;
- subliminal methods shall not be used; and
- the proportion of advertisements shall be below a certain level.

Law stated - 21 April 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

In Japan, subscription rates for cable TV are relatively low and there are therefore no general rules like must-carry obligations. As a side note, the relay broadcasting functioning as a gap filler in rural areas with poor reception plays a similar role. Currently, there are many cases where local governments become gap fillers. Fees shall not be charged for the viewing of relay broadcasts for measures against poor reception.

On 25 April 2025, the amendment to the Broadcasting Act was enacted, obliging broadcasters to endeavour to provide their viewers access to alternative services to continue watching their programmes in the event such broadcasters are forced to close a relay terrestrial key broadcasting station due to a significant decrease in the local population or for other reasons.

Law stated - 21 April 2025

Regulation of new media content

23 | Is new media content and its delivery regulated differently from traditional broadcast media? How?

Generally speaking, on-demand streaming services on the internet have been considered to fall under telecommunications rather than broadcasting, and the Broadcasting Act does not apply.

On the other hand, an operator of new media content can be subject to some regulations under the Telecommunications Business Act, including prohibition of censorship, protection of secrecy of communications, and notification to its users concerning cookies or other similar technologies.

Law stated - 21 April 2025

Digital switchover

24 | When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The nationwide switchover from terrestrial analogue television to terrestrial digital television was completed on 31 March 2012, and the switchover from satellite analogue television to satellite digital television was completed on 24 July 2011.

Part of the very high-frequency bands that had once been allocated to terrestrial analogue television was allocated to the mobile multimedia broadcasting service upon the switchover to digital television; however, the mobile multimedia broadcasting service is currently out of service.

Furthermore, part of the ultra-high frequency bands that had once been allocated to terrestrial analogue television is currently allocated to mobile phone services.

Law stated - 21 April 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

The MIC has established technical standards of transmission for various types of broadcasting including digital television that provide certain technical requirements, such as multiplexing, scrambling and video resolution.

Law stated - 21 April 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

The media plurality rules prohibit the granting of basic broadcaster authorisation to the following entities, in principle:

- an existing basic broadcaster;
- a person who has control over another basic broadcaster; or
- a person controlled by any of the foregoing.

In other words, one person cannot conduct multiple basic broadcasting activities. However, there are some exceptions to this principle, which are outlined in the Ministerial Ordinance on Definitions of Specific Officers and Controlling Relationships Related to the Business of Basic Broadcasting and on Special Provisions of the Standards of Freedom of Expression (Media Plurality Ordinance), including certified broadcasting holding companies. Cross-ownership between broadcasters and other media such as newspaper publishers is not regulated, while it is still prohibited for one group company to own all of the terrestrial television broadcasting, the radio broadcasting and the newspaper in the same area if there are no other mass media in such area.

Law stated - 21 April 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

The amended Broadcasting Act will be enforced on 1 October 2025, and obligates NHK to perform the following in its operations online:

- simultaneously stream its programmes;
- rebroadcast its programmes for a certain period; and
- provide programme-related information.

It has been widely reported in Japan that one of the major broadcasters kept a Japanese celebrity on air after being aware of his sexual scandal. As a result, many sponsors withdrew their commercials, ultimately leading to the resignation of its representative directors. It has been reported that the regulator issued administrative guidance recommending enhancement of compliance and corporate governance..

It is worth noting that more and more Japanese people are ‘cutting the cord’ and relying on streaming services on the internet. Major broadcasters, including NHK, now stream many of their programmes both on their own platform and via platforms owned by third parties. TVer, the most popular app that distributes a lot of programmes from major broadcasters,

has been downloaded over 80 million times and the number of monthly users in January 2025 reached 41 million.

The focus of regulatory discussions has been shifting from traditional broadcasting media to emerging digital platforms, particularly social media, for example, the Act on the Limitation of Liability for Damages of Specified Telecommunications Service Providers and the Right to Demand Disclosure of Identification Information of the Senders was enacted on 17 May 2024 and came into effect on 1 April 2025. The Act was renamed the Act on Measures Against Rights Infringement, etc. Arising from Distribution of Information by Specified Telecommunications (commonly referred to as the Information Distribution Platform Act). In order to deal with illegal and harmful information on the Internet, such as defamation, the amended Act obliges large-scale platform operators to take measures including speeding up their response to removal requests and making the operational status transparent.

Law stated - 21 April 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The Ministry of Internal Affairs and Communications (MIC) regulates the communications and media sectors. The MIC also regulates the broadcasting sectors. The antitrust area is regulated by the Fair Trade Commission (FTC) under the Act on Prohibition of Private Monopolisation and Maintenance of Fair Trade (the Antimonopoly Act).

There are no specific mechanisms to avoid conflicting jurisdiction; however, to ensure the consistent application of competition and sectoral regulation, the MIC and the FTC have jointly published the Guidelines for Promotion of Competition in the Telecommunications Business Field since 30 November 2001. These guidelines have been periodically revised, and the latest version of these guidelines was issued on 23 December 2022. These guidelines provide for acts that pose a problem under the Antimonopoly Act or the Telecommunications Business Act and actions that businesses are encouraged to take from the perspective of further promoting competition, etc.

Law stated - 21 April 2025

Appeal procedure

29 How can decisions of the regulators be challenged and on what bases?

A person who wants to challenge a disposition by the MIC under the Radio Act or the Broadcasting Act (eg, refusal or revocation of a licence of a radio station or broadcasting services) must first submit a request for review to the Minister of Internal Affairs and Communications (the Minister). Upon receipt of a request for review, the Minister shall, in principle, refer the case to the Radio Regulatory Commission, which shall commence a hearing within 30 days of the date of receipt of the request for review. Not only the petitioner but also approved interested parties may attend the hearing. The petitioner and approved interested party are guaranteed the opportunity to appoint an attorney, appear at the hearing, make statements and submit evidence. The Minister shall decide on the request for review under an opinion of the Radio Regulatory Commission within seven days from the receipt of the opinion. Any person who is dissatisfied with the decision of the Minister may file an action for revocation of the decision before the Tokyo High Court. In principle, the court shall be bound by the facts found by the Radio Regulatory Commission.

Law stated - 21 April 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

Nippon Telegraph and Telephone Public Corporation, which had been a public company monopolising the domestic telecommunications market, was privatised as Nippon Telegraph and Telephone Corporation (NTT) in 1985. Since then, NTT has been regulated under the Act on Nippon Telegraph and Telephone Corporation (the NTT Act), which imposes structural rules specific to NTT and its group companies, such as the requirement that the government hold at least one-third of NTT's shares. In addition, NTT group companies are subject to special business obligations under the Telecommunications Business Act to ensure a level playing field with their competitors.

Between 2023 and early 2025, the Information and Communications Council, an advisory body to the MIC, reviewed whether the NTT Act should remain in force. While NTT advocated for its repeal, arguing that there is no longer a justification for imposing special structural obligations, its competitors maintained that NTT continues to possess essential facilities and should therefore remain subject to differentiated regulation.

The Council ultimately concluded that the structural and behavioural regulations specific to NTT should, in principle, be maintained, though some provisions should be revised to reflect current market conditions. Based on this conclusion, in March 2025, the MIC submitted a bill to amend the NTT Act and the Telecommunications Business Act. Key proposed changes include:

- the relaxation of universal service obligations imposed on NTT EAST and NTT WEST; and
- the elimination of the restriction limiting NTT EAST and NTT WEST's scope of their regular businesses with intra-prefectural telecommunications.

Additionally, the proposed amendments to the Telecommunications Business Act introduce a new annual review process, under which the MIC will conduct research and assessments

to determine whether fair competition is being maintained among telecommunications service providers. The findings will inform future revisions and implementation of the Telecommunications Business Act, the NTT Act, and related regulations.

Law stated - 21 April 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The regulatory framework for telecommunications in Malta is based primarily on the following primary and secondary legislation:

- the Malta Communications Authority Act (Chapter 418, Laws of Malta);
- the Electronic Communications (Regulation) Act (ECRA) (Chapter 399, Laws of Malta);
- the Electronic Communications Networks and Services (General) Regulations (ECNSR) (Chapter 399.48, Laws of Malta);
- the Data Protection Act (Chapter 586, Laws of Malta);
- the Processing of Personal Data (Electronic Communications Sector) Regulations (SL 586.01, Laws of Malta);
- the General Authorisations (Radiocommunications Apparatus) Regulation (SL399.40 Laws of Malta);
- the Electronic Commerce Act (Chapter 426, Laws of Malta); and
- the Broadcasting Act (Chapter 350, Laws of Malta).

Besides these principal sources of law, there are various other main and subsidiary laws that directly or indirectly regulate certain aspects of the sector. Additionally, the Malta Communications Authority (MCA) regularly issues consultation documents, decision documents, guidelines and directives that further regulate this sector in Malta.

Law stated - 9 May 2025

Authorisation/licensing regime

2 Describe the authorisation or licensing regime.

In terms of ECRA, undertakings wishing to provide electronic communications are required to notify the MCA to obtain a general authorisation to provide such services.

Malta's current telecommunications authorisation system is divided into three main categories, namely authorisations for the provision of networks and (or) services, spectrum licensing and licensing for use of radio communications equipment.

Any undertaking that provides in Malta, or intends to provide in Malta, an electronic communications service and (or) network is required to formally notify the MCA on the official Notification Form .

Rights of use of radio frequencies are granted by the MCA either under a general authorisation or under an individual licence, depending on the frequency band. When

individual licences have been granted, this has been done either by auction or by beauty contests.

An undertaking can also be required to obtain authorisations to provide other specialised services or use certain apparatus or spectrum in terms of other subsidiary legislation enacted under ECRA. Such legislation includes, among others:

- the General Authorisations (Radiocommunications Apparatus) Regulations (Subsidiary Legislation 399.40);
- the Authorisation of Frequency Use (Provision of 2GHz Mobile Satellite Services) Regulations (Subsidiary Legislation 399.44); and
- the Radiocommunications (Amateur Station Licence) Regulations (Subsidiary Legislation 399.46).

There are no restrictions on foreign companies commencing operations in the Maltese telecommunications market and in fact, all of the larger telecom players in Malta have material or controlling foreign interests. However, where the notifying undertaking is registered in an EU country, the notification must include an official address for service of notice in Malta. Where the notifying undertaking is not registered in an EU country, the notification must include an official address for service of notice in Malta and the notifying undertaking must, as a minimum, be registered as an overseas company with the Malta Business Registry.

Law stated - 9 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

All types of technology used for electronic communications services may be used in the radio frequency bands declared available in the frequency plan in accordance with EU law, provided that restrictions may be imposed where necessary to avoid harmful interference, to ensure technical quality of service, and to safeguard the efficient use of spectrum, among other reasons provided for under ECRA. In accordance with ECRA, radio spectrum for the provision of electronic communications services is assigned on a service-neutral basis.

An undertaking may transfer or lease the individual rights to use radio frequencies in the bands identified in the national frequency plan that may be transferred or leased to other undertakings in accordance with the conditions attached to such rights of use of radio frequencies, provided that conditions attached to individual rights to use radio frequencies shall continue to apply after the transfer or lease, unless otherwise specified by the MCA.

In such cases, the licensed transferring undertaking shall notify the MCA of its intention to transfer rights to use radio frequencies, as well as the effective transfer thereof to the MCA.

Law stated - 9 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

The latest version of the Commission Recommendation on relevant product and service markets within the electronic communications sector susceptible to ex-ante regulation published in December 2020 (the Recommendation) lists two markets in which ex-ante regulation might be warranted, namely:

- wholesale local access provided at a fixed location; and
- wholesale dedicated capacity.

In December 2023, the MCA proposed that the incumbent (GO plc) had enjoyed a position of significant market power and that consequently ex ante remedies would be introduced. Following the issuance of a Serious Doubts letter, the MCA stated that it would re-assess the wholesale fixed access market. On 21 February 2025, the MCA published its revised draft market analysis wherein it proposes that two of the three criteria in the 3CT (three criteria test) have not been met and that the market was tending towards effective competition, while the continued imposition of ex ante regulatory obligations was no longer justified. The consultation ran until 11 April 2025 (see MCA consultation document), and the MCA's decision is yet to be published.

With regard to the MCA's analysis of the 'wholesale market for the provision of dedicated capacity in Malta', a consultation document was issued on 30 September 2022 wherein the MCA considered no undertaking enjoys significant market power in the wholesale market for the provision of dedicated capacity in Malta and accordingly, that the relevant market is effectively competitive and expected to remain structurally so within the coming five-year period. Thus, the MCA is of the opinion that it is not justifiable to maintain regulatory obligations and is proposing to withdraw such obligations. The withdrawal of such obligations does not affect other obligations that may have been imposed on undertaking under other decision documents.

Law stated - 9 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

The ECNSR provides for the possibility of requiring vertically integrated undertakings to situate activities relating to the wholesale provision of relevant access products in an autonomously functioning business entity in the event that other measures have failed to resolve persisting competition problems or market failures identified by the MCA. This separate entity is to supply access products and services to all undertakings, including to other business entities within the parent company on the same timescales, terms and conditions.

In theory, if the MCA were to decide to impose this remedy, it must first present a proposal to the European Commission, and such a proposal should include all the requisite information that ultimately will enable the European Commission to reach a decision. Once such a decision is reached, the MCA shall undertake to carry out a fully fledged analysis of the different markets related to the access network.

Neither structural nor functional separation has been introduced or contemplated in Malta.

Law stated - 9 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

The MCA is empowered to establish universal service obligations (USOs) to ensure that adequate broadband internet access service and voice communications services at the specified quality, including the underlying connection, at a fixed location are made available at affordable prices to all consumers in Malta, in the light of national conditions and independently of geographic location. The MCA is also required to ensure the continuation of the availability and affordability of existing universal services when justified according to the national circumstances.

On 28 April 2023, the MCA issued a decision notice 'Universal Service Obligations On Electronic Communications Services', which updated the universal service regime in Malta in respect of the following USOs:

- provision of voice communications services at a fixed location;
- provision of reduced tariff options;
- provision of other specific measures for vulnerable users;
- control of expenditure by users; and
- the comprehensive electronic directory.

The decision notice also states that providers responsible for the provision of all or part of the USOs may submit a claim for compensation in relation to any unfair burden they claim to have suffered because of providing each respective USO. This will subsequently be evaluated by the MCA to determine whether a burden in fact exists in this regard.

Law stated - 9 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

Number allocation in Malta is contemplated under the ECNSR and within several documents published by the MCA itself, particularly the National Numbering Plan, which provides the necessary framework that outlines the award of rights of use, as well as the conditions for the use of numbering resources. The MCA is responsible for establishing procedures to guarantee that the allocation of numbers is carried out in an objective, transparent, non-discriminatory, equitable and well-timed manner. Moreover, the National Numbering Plan includes a list of the available numbering ranges and the requisites and standards that apply to them. If these ranges are made available, a prospective applicant can apply for numbers by either submitting an application for new numbers or number blocks or by submitting an application for additional numbers or number blocks. The MCA may also revoke, suspend or change number use, in certain instances.

With regard to number portability, on 15 November 2022, the MCA published a decision notice updating its previous decision on Number Portability In Malta. The decision notice makes reference to regulation 94(5) of the ECNSR, which states that end-users subscribed to voice communications services with numbers from the National Numbering Plan may request that they retain their numbers, independently of the undertaking providing the service. The right applies:

- in the case of geographic numbers, at a specific location; and
- in the case of non-geographic numbers, at any location.

Thus, the requirement for provider portability applies to numbers assigned for fixed voice communications services, mobile voice communications services and special tariffs; namely, freephone numbers and premium-rate numbers. The right does not apply to the porting of numbers between networks providing services at a fixed location and mobile networks, 'service portability'. It should also be noted that in the case of machine-to-machine or internet-of-things (M2M/IoT) connectivity services and other non-interpersonal communications services (non-ICS), which benefit from a solely dedicated E.164 national numbering range with the prefix '4', there is no obligation to provide number portability for numbers from this range as this could, in some cases, constitute service portability. Nonetheless, numbers from the '4' range may be ported out, to another provider of M2M/IoT connectivity service or other non-ICS, subject to a voluntary agreement between the donor and recipient operators. The MCA did not impose location portability as a requirement but encourages providers of fixed voice communications services to provide subscribers with this facility where possible. The MCA has published a number of other decisions that define the requirements associated with number portability and various related processes.

Law stated - 9 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

To safeguard the interests of customers, the MCA, which is in charge of regulating the electronic communications industry in Malta, has adopted a number of legal instruments on

subscriber contracts (available at Modifications to the Terms and Conditions of subscriber contracts) . By way of example, the MCA has established rules for the minimum amount of details that must be included in contracts for electronic communications services, such as broadband, telephone and television services, and are required to be disclosed to customers. The rules stipulate that contracts must be drafted in simple, straightforward language and that customers must be given details about costs, fees and service levels. Moreover, subscribers must be given at least 30 days' prior notice of the undertaking's intention to modify the contractual terms and in such circumstances, a subscriber may dissolve from the contract without incurring a penalty. Additionally, undertakings must offer consumer contracts of 12 months and cannot offer consumer contracts exceeding 24 months. The MCA has also produced guidelines for the minimum terms and conditions for electronic communications services, including clauses about invoicing, payment, termination and dispute resolution.

Law stated - 9 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

EU Regulation (EU) 2015/2120 (Open Internet Access Regulation) laying down measures concerning open internet access entered into force in 2015. The Open Internet Access Regulation was accompanied by a set of guidelines published by the Body of European Regulators for Electronic Communications that aim to guide national regulatory authorities when it comes to implementing these rules. The Regulation permits the use of 'reasonable traffic management practices' to avoid an 'impending network congestion'. Nevertheless, the guidelines clarify that, although the monitoring of generic content, such as the internet protocol packet header, is allowed, the monitoring of specific content (such as the information provided by the user) is prohibited.

The Open Internet Access Regulation provides that specialised services, that is, 'services other than internet access services which are optimised for specific content, applications or services, or a combination thereof' fall outside its scope and thus users of specialised services are not protected by the open internet rules as provided in the Regulation.

With regard to bandwidth throttling, the Open Internet Access Regulation holds that bar the exception of reasonable traffic management, blocking, slowing down, altering, restricting, interfering with, degrading or discriminating between specific content, applications or services, or specific categories thereof, are all prohibited.

The MCA also published a 'Report on the Malta Communications Authority's work on the implementation o
f the EU Net Neutrality Regulation', which confirmed that there were (at least at the time of its publication in 2017), 'no major concerns regarding open internet access in Malta. The MCA will continue to monitor the market in order to ensure that compliance is maintained in the long-term and, where this is not the case, will ensure that compliance is efficiently restored.'

Law stated - 9 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

Legislation in relation to digital platforms have come into effect through the EU's Digital Services Act and the Digital Markets Act, which are directly applicable across the European Union.

Regulation (EU) 2019/1150 on promoting fairness and transparency for business users of online intermediation services (Platform to Business Regulation) has been implemented through the Online Intermediation Services for Business Users (Enforcement Measures) Re
gulations (Chapter 399.49) that:

- put into place enforcement tools whereby a business user can seek redress before the Civil Court if there is non-compliance by the provider of an online intermediation service with certain obligations onerous on any such provider as stated in Platform to Business Regulation; and
- enables a designated organisation, association or public body to apply to the Civil Court to stop or prohibit non-compliance with certain articles of the Platform to Business Regulation by a provider of an online intermediation service or a provider of an online search engine.

Law stated - 9 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

In 2011, the MCA published an information document that outlined its strategy for regulation of NGA. The MCA stated that it would adopt a number of activities based on the 'ladder of investment' principle. These initiatives ranged from duct access focused initiatives to shared access, bitstream and resale.

Notionally, however, these initiatives are to a degree redundant since Malta has near-ubiquitous NGA coverage. Indeed, the latest Digital Agenda Scoreboard once again ranks Malta first, amongst the 27 EU member states, in next generation broadband network coverage.

Law stated - 9 May 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

In addition to the protection provided in the Data Protection Act and Regulation (EU) 2016/679 (General Data Protection Regulation) (GDPR), it is pertinent to note the additional protections afforded through the provisions of the Processing of Data (Electronic Communications Sector) Regulations (SL 586.01). The Processing of Data (Electronic Communications Sector) Regulations (SL 586.01) regulate data protection in the electronic communications sector. Thus, for instance, regulation 20 establishes that service providers must retain certain categories of data necessary to:

- trace and identify the source of a communication;
- identify the destination of a communication;
- identify the date, time and duration of a communication;
- identify the type of communication;
- identify users' communication equipment or what is purported to be their equipment; and
- identify the location of mobile communication equipment.

Law stated - 9 May 2025

Cybersecurity

13 | Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The Maltese Criminal Code criminalises unlawful access to, or use of, information, particularly using computers or other devices. Actions including the unlawful use of a computer or other device or equipment to access any data, unauthorised activities that hinder access to any data as well as unlawful disclosure of data or passwords and the misuse of hardware may all result in a criminal offence. The Information and Data Protection Commissioner is the authority empowered to regulate and enforce cybersecurity aspects of the processing of personal data whereas the MCA is charged with the responsibility of enforcing the security of Malta's public communication networks.

Additionally, Maltese legal instruments dealing with various aspects of cybersecurity include the following:

- the Processing of Personal Data (Electronic Communications Sector) Regulations (SL 586.01);
- the Electronic Communications Act (Chapter 399, namely article 48)
- the Electronic Communications Networks and Services (General) Regulations (SL 399.28); and
-

the Council of Europe Cybercrime Convention, to which Malta has been a signatory since 2001, and was ratified in April 2012.

The Malta Financial Services Authority has suggested Cybersecurity Guidance Notes, which might be thought of as a minimal set of best practices and risk management guidelines to be followed to successfully reduce cyber risks.

Legislation in relation to cybersecurity will come into effect through the NIS 2 Directive, which is applicable to all EU member states, with each state needing to make state law applicable with the NIS 2 Directive by 17 October 2024. Malta has only recently transposed the NIS2 Directive into national law.

Law stated - 9 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

In Malta, the processing of personal data, especially big data, is governed by the GDPR. Individuals have several rights under the GDPR, including the right to view their personal data, the right to have inaccurate data corrected, the right to object to processing, and the right to have their personal data erased. Additionally, the GDPR mandates that organisations obtain explicit consent before collecting or processing any personal data.

The processing of personal data in Malta is governed by the Data Protection Act (Chapter 586 of the Laws of Malta). The Data Protection Act and the GDPR have both been actively enforced in Malta by the Office of the Data Protection Commissioner. The office has the authority to look into and punish businesses that disobey data protection laws, and it has imposed fines for noncompliance. Overall, Malta has created a solid legal system and enforcement apparatus to handle the legal issues brought on by big data.

Law stated - 9 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

The Processing of Data (Electronic Communications Sector) Regulations (SL 586.01) regulate data protection in the electronic communications sector. Thus, for instance, regulation 20 establishes that service providers must retain categories of data necessary to:

- trace and identify the source of a communication;
- identify the destination of a communication;
- identify the date, time and duration of a communication;

- identify the type of communication;
- identify users' communication equipment or what is purported to be their equipment; and
- identify the location of mobile communication equipment.

In terms of regulation 18, a service provider of publicly available electronic communications services or of a public communications network is bound to retain the data referred to, to the extent that the data is generated or processed by such providers in the process of providing the communications services concerned.

There are currently no other generally applicable laws or regulations that require data to be stored locally (but of course there are restrictions on the transfer of personal data outside the EEA as detailed in Chapter V of the GDPR). However, regulated activities such as financial services or remote gaming could be subject to significantly more stringent data storage policies including specific locations for such data to be stored or replicated to be accessible to the relevant regulators.

Law stated - 9 May 2025

Key trends and expected changes

16 | Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

Within the communications sector in Malta, changing consumer and business needs continue to drive demand for a better quality of service, greater reliability and security, faster speeds and additional bandwidth on both fixed and wireless electronic communications networks. As reiterated by the MCA in its 2025 Annual Plan, '[l]ocal operators continue investing in very high-capacity networks (VHCNs) - fixed, mobile and wireless - reflecting the sector's dynamic growth. Beyond meeting rising traffic demands, the focus is on developing greener, more resilient and higher-quality networks capable of supporting emerging needs.'

Network security and resilience remains critical and the MCA will undertake a number of workstreams in relation to this strategic initiative.

Law stated - 9 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The key laws in Malta's regulatory framework for the media sector focus around:

- the Broadcasting Act (Chapter 350, Laws of Malta);
- the Electronic Communications (Regulation) Act; and

- the Media and Defamation Act (Chapter 579, Laws of Malta), formerly the Press Act.

These key pieces of legislation are enforced through the Broadcasting Authority (BA). The Broadcasting Act governs radio and television broadcasting and calls for government-issued licences for broadcasters. It also lays out guidelines for content, such as requirements for fairness, impartiality, and accuracy. The Maltese Constitution additionally protects freedom of speech and the press, subject to certain restrictions for the protection of national security, public order and morality, and to guarantee truthful and impartial reporting. The Constitution also guarantees the right to access information held by public authorities. Overall, the media in Malta enjoys a high degree of freedom but is subject to regulation to ensure that content is accurate, fair and balanced.

Law stated - 9 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

According to article 10(5) of the Broadcasting Act, a licence for any broadcasting service may only be awarded to a company regularly incorporated in Malta in accordance with the Companies Act. With regard to the cross-ownership of media, there are currently no rules in place to limit the extent of media ownership by one owner. Nevertheless, the Broadcasting Act requires the BA to be guided by principles of pluralism and diversity when considering broadcast licence applications.

Law stated - 9 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

The BA is in charge of regulating all broadcasting content on radio and TV that originates from the Maltese islands and it has also been designated as the authority in charge of broadcasting licensing in accordance with article 3 of the Broadcasting Act. Furthermore, the same Act provides that a broadcasting licence may be granted to an applicant under such terms, conditions and limitations as the BA may deem fit. Indeed, every licence granted by the BA shall include all such provisions that the BA may deem necessary or expedient. In light of this, the First Schedule to the Broadcasting Act shall apply to such licences.

Currently, the BA is authorised to issue the following types of licences.

A licence for nationwide radio and TV broadcasting services

With respect to this type of licence, all frequencies have been assigned. Nevertheless, television channels on the cable network and on the digital aerial network are still available. Therefore, a prospective broadcasting station must first reach out to two service providers, namely, Melita and GO plc. Where the service provider enters into a carriage agreement with the prospective broadcaster, the applicant may submit an application to the BA. Applications for a nationwide sound broadcasting licence must be accompanied by a non-refundable application fee of €5,823. Moreover, the annual licence fee payable to the BA for a nationwide sound broadcasting licence currently is €11,646.

A licence for digital radio broadcasting service

Currently, the licensed digital radio broadcasting service provider is Digi B Network Limited. After the BA issued a public call for applications and auction, Digi B Network acquired the right of use of digital audio broadcasting spectrum for use throughout the Maltese islands. Therefore, a prospective applicant must first be assigned a new channel by the aforementioned service provider, and then he or she may apply for a broadcasting licence from the BA. Simultaneously with the submission of the application, the applicant should also pay a fee of €1,160. An annual licence fee is also applicable. Last, unless a licence is lawfully terminated or abridged, the validity period of such a licence shall be up to a maximum of four years and additionally, it is renewable every four years. To this end, a fee of €3,000 is due upon each renewal of an application, based on the current fee tariff.

A licence for community radio stations

This particular licence caters for the needs of a particular community or locality and has a limited range of reception. Before submitting an application for a broadcasting licence with the BA, the prospective licence must first reach out to the Malta Communications Authority (MCA) to obtain frequency allocation. Applications for a community sound broadcasting licence (including for one-off events) must be accompanied by a non-refundable application fee of €116. Moreover, the annual fee payable to the BA for a community sound broadcasting licence is €349 and for licences payable to the BA for community sound broadcasting services for one-off events it is €116 per event.

A licence for nationwide television teleshopping broadcasting service

Before a prospective applicant submits his or her application with the BA, he or she must first approach both Melita and GO, the two cable TV distribution networks on the island, to enter into a carriage agreement in respect of the new teleshopping channel.

A licence for a satellite television broadcasting service

To obtain approval for this kind of broadcasting service, a prospective applicant must first submit an application for a Satellite Earth Station Licence with the MCA, as it is charged with the authority to license satellite uplink services. The applicable licence fees are as follows:

- for each station, for the transmission of communications, depending on the radio frequency bandwidth:

- stations using up to 10MHz radio frequency bandwidth, per 1MHz radio frequency bandwidth, per annum fee is €650; and
- stations using more than 10MHz radio frequency bandwidth, per annum fee is €6,500; and

- each station, for the transmission of communications, used for any event:
  - of 30 days or part thereof, per 1MHz radio frequency bandwidth, the fee is €110; and
  - exceeding 30 days or part thereof, the monthly fee, per 1MHz radio frequency bandwidth, is €110.

As soon as the uplink services are duly approved by the MCA, the prospective applicant may then submit an application to obtain a licence for a satellite television broadcasting service.

Law stated - 9 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

With respect to the broadcasting of foreign-produced programmes, there are no specific regulations in place and there are no rules relating to the minimum amount of local content. Nevertheless, in terms of the Broadcasting Act, in relation to both television and sound broadcasts other than advertisements, the BA has the power to scrutinise the programme schedules.

Furthermore, the same Act provides that the BA may give instructions:

- as to the exclusion of any from a programme schedule;
- as to the inclusion in, or in a particular part of, a programme schedule of items of a particular category; or
- as to the inclusion in a particular part of a programme schedule of a particular item.

The BA is only bound to approve a programme schedule once it is satisfied that it conforms to its own instructions. Therefore, in light of the above, the BA holds ultimate control in relation to both local and foreign-produced programmes.

However, article 16N of the Broadcasting Act requires that providers of on-demand audiovisual media services should ensure that 30 per cent of their catalogues contain European works and given sufficient prominence.

Law stated - 9 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

The Broadcasting Act regulates media advertising together with the relevant subsidiary legislation. Article 16K of the aforementioned Act provides the rules applicable to audiovisual commercial communications. The Broadcasting Act requires that all such communication is readily identifiable. Audiovisual commercial communication is also deemed illegal when it:

- causes prejudice to the right for respect for human dignity;
- includes subliminal techniques and when it spreads misleading information;
- includes or promotes any form of discrimination based on sex, racial or ethnic origin, nationality, religion or belief, disability, age or sexual orientation;
- encourages behaviour detrimental to the health or safety of the individual;
- encourages behaviour grossly harmful to the protection of the environment;
- promotes tobacco products and cigarettes;
- promotes alcoholic beverages in such a way as to target minors or to stimulate immoderate consumption of such beverages by adults;
- serves as an advertisement of medicinal products and medical treatment available only on prescription in the member state within whose jurisdiction the media service provider falls;
- causes physical or moral detriment to minors;
- directly encourages minors to buy or hire a product or service by abusing their inexperience or innocence;
- strongly urges minors to persuade their parents or others to purchase the advertised goods or services; and
- exploits the special trust minors place in parents, teachers or other persons, or when it unreasonably includes the presence of minors in dangerous situations.

With regard to advertising online, Maltese law does not directly regulate advertising that occurs over the internet in general or through social media. Nevertheless, a number of laws apply in more general terms. For instance, advertising of goods and services must be consistent with the relevant European directives regarding consumer protection and that consequently have been transposed into Maltese law, specifically under the Consumer Affairs Act and the eCommerce Act. Thus, for instance, the advertising of tobacco products is prohibited, and standards of practice are applicable to the advertising of gambling, alcohol and tattoos. Furthermore, reference should also be made to the local provisions on misleading and comparative advertising. Essentially, the legislation that implemented the Directive regarding misleading and comparative advertising is the Consumer Affairs Act, where Act XXVI of 2000 (the Consumer Affairs (Amendment) Act) saw the introduction of article 48 dealing with misleading advertisements, article 49 dealing with comparative advertising and article 50 dealing with allowable comparative advertising.

Law stated - 9 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Must-carry obligations are regulated by regulation 101 of the Electronic Communications Networks and Services (General) Regulations (ECNSR), which provides that the MCA may impose 'must carry' obligations for the transmission of specified radio and television broadcast channels and complementary services, principally accessibility services to enable suitable access for disabled end users, on undertakings providing electronic communications networks used for the distribution of radio or television broadcasts channels to the public where a significant number of end users of such networks use them as the principal means to receive radio and television broadcasts. However, such obligations shall only be compulsory where they are required to meet clearly expressed general interest objectives and shall be proportionate and transparent.

With regard to financing, the same regulation provides that the MCA may determine, in a proportionate and transparent manner, the appropriate remuneration, if any, in respect of measures taken in accordance with the above-mentioned provision.

On 3 March 2023, the MCA published its decision on its review of must-carry obligations. In respect of remuneration, it stated 'it would be disproportionate for undertakings of pay-TV platforms, subject to "must carry" obligations, to be remunerated by GI TV broadcasters for the transmission of the of the GI TV broadcast channels'. No remuneration for must-carry obligations is in place.

Law stated - 9 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

The Malta Broadcasting Authority (MBA) is responsible for overseeing conventional broadcast media in Malta, including radio and television, in accordance with the Broadcasting Act. The MBA has imposed rigorous content rules on traditional broadcast media, including requirements for programming, advertising, and political material.

There is no sector-specific legislation to regulate new media content within the sphere of Maltese media law. New media content is thus regulated through a patchwork of existing laws that generally regulate consumer protection, privacy, and intellectual property as well as technical regulations on topics like network security and interoperability.

Law stated - 9 May 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

Digital switchover was completed on 31 October 2011 with the switching off of the analogue broadcasts. Consequently, the switchover freed up space for more radio frequencies that could then be utilised for long-term evolution (LTE) networks in competition with the current LTE network.

After the switchover, the MCA's main goal was to coordinate spectrum to simplify the effective provision of mobile services in the 790MHz–862MHz frequency band, which is often referred to as the 800MHz band, with the ultimate aim of making the most of the digital dividend for Malta.

Individual rights-of-use of radio spectrum in the 800MHz and 2.5GHz bands were issued in April 2018. Melita Ltd, Vodafone Malta Ltd and GO plc were awarded the right to use additional radio spectrum for wireless broadband services. This additional spectrum enables superfast mobile broadband services and enhanced indoor coverage for the benefit of consumers and businesses in Malta. Through spectrum licence awards, the MCA aims to promote strong competition and creates more value for consumers, leading to faster mobile broadband speeds, lower prices, greater innovation, new investment and better indoor coverage.

This change was a significant turning point in the growth of the Maltese broadcasting industry because it gave viewers access to new digital services including electronic programme guides, interactive material, and high-definition television as well as higher quality of audio and video.

Law stated - 9 May 2025

Digital formats

25 Does regulation restrict how broadcasters can use their spectrum?

Regulation 76 of the ECNSR states that the MCA may attach one or more of the following conditions to each individual authorisation it issued, in accordance with Part B of the 7th Schedule of the same regulations:

- obligation to provide a service or to use a type of technology for which the rights of use for the frequency has been granted, including, where appropriate, coverage and quality requirements;
- effective and efficient use of frequencies in conformity with the EU Framework Directive;
- technical and operational conditions necessary for the avoidance of harmful interference and for the limitation of exposure of the general public to electromagnetic fields, where such conditions are different from those included in the general authorisation;

- maximum duration in conformity with article 5 of the Authorisation Directive, subject to any changes in the national frequency plan;
- transfer of rights at the initiative of the right holder and conditions for such transfer in conformity with the EU Framework Directive;
- usage fees in accordance with the same ECNSR;
- any commitments that the undertaking, obtaining the usage right, has made in the course of a competitive or comparative selection procedure;
- obligations under relevant international agreements relating to the use of frequencies; and
- obligations specific to an experimental use of radio frequencies.

Law stated - 9 May 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

With respect to media plurality, article 11 of the Broadcasting Act provides that when issuing broadcasting licences, the BA shall be guided by the principles of freedom of expression and pluralism; these shall be the basic principles that regulate the provision of broadcasting services in Malta. Therefore, the BA does not have a particular process to assess media plurality, but it simply conforms to its own principles of pluralism.

Nevertheless, after a thorough analysis of article 15 of the Broadcasting Act, one may deduce that the Act empowers the BA to give any person providing, or responsible for the provision of, any sound or television broadcasting service in Malta such directions as the BA may deem necessary or expedient. Therefore, although the law only briefly considers the principle of media plurality, the Broadcasting Act is still given leeway to give directions on this principle as it deems fit.

Law stated - 9 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

Following the European Commission's adoption of the European Media Freedom Act in 2022, which implements a number of rules to protect media pluralism and independence in the European Union, it is envisaged that Malta will benefit from the new safeguards implemented therein, especially those against political interference in editorial decisions and those against surveillance. The European Media Freedom Act promotes independence and stable funding of public service media the transparency of media ownership and state

advertising. The Act should address certain questions and issues that may arise in relation to government funding of the media. The telecoms sector is also undergoing structural transformation, driven by regulatory reform, technological advancement, and strategic investment. The recent acquisition of Melita by Goldman Sachs Alternatives marks a significant development in Malta's digital landscape, potentially accelerating the rollout of advanced broadband and mobile services. At the EU level, several key legal instruments are reshaping the regulatory landscape:

1. Merger control reform: The European Commission has initiated a public consultation to revise EU merger rules, focusing on factors such as competitiveness, innovation, and digitalisation. This reflects a shift towards a more holistic assessment of mergers, considering their potential to drive innovation and investment.
2. Digital Networks Act (DNA): Scheduled for release in the fourth quarter of 2025, the DNA aims to harmonise telecommunications regulations across member states, fostering a single market for connectivity and streamlining spectrum authorisation. This regulation is expected to supersede the European Electronic Communications Code (EECC), providing a more unified framework for digital infrastructure.
3. Cybersecurity enhancements: The adoption of Directive (EU) 2022/2555, known as the NIS 2 Directive, has expanded the scope of cybersecurity requirements for electronic communications providers. This Directive (implemented by means of Legal Notice 71 of 2025) replaces articles 40 and 41 of the EECC, emphasising the need for robust security measures in the telecom sector.
4. AI regulation: The forthcoming AI Act introduces obligations for providers of general-purpose AI models, including transparency and risk management requirements. This legislation aims to ensure that AI technologies are developed and deployed responsibly within the EU.

These legal instruments collectively signify the EU's commitment to fostering a competitive, secure, and innovative telecommunications and media environment. Stakeholders in Malta and across the EU should closely monitor these developments to ensure compliance and to leverage emerging opportunities within the evolving regulatory framework.

Law stated - 9 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The Broadcasting Authority (BA) is in charge of all broadcasting stations and ensures their compliance with legal and licence obligations, including matters relating to public or political controversy (namely, the media sector). The communications sector is overseen

by the Malta Communications Authority (MCA), which is responsible for the regulation of communication services in Malta.

The MCA is a separate and distinct body from both the BA and the Malta Competition and Consumer Affairs Authority (MCCAA), the latter being the one responsible for antitrust regulations and ensuring 'the consistent application of competition and sectoral regulation'. Broadly, the MCA is responsible for ex ante regulation, while the MCCAA investigates complaints from an ex-post perspective.

Law stated - 9 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

With regard to the MCA, an aggrieved individual or undertaking may file an application with the Administrative Review Tribunal (which replaced the former Communications Appeals Board). This tribunal is competent to review administrative acts of the public administration on points of law and points of fact. Moreover, unless any provision of the law does not provide for any time limit for the filing of an action for review by the tribunal, an action to review administrative acts is to be filed within a period of six months from the date when the interested person becomes aware or could have become aware of such an administrative act, whichever is the earlier.

On the other hand, if a broadcasting licence is refused or suspended by the BA, an appeal may be filed before the Court of Appeal within 15 days from the date that the decision of the BA is served.

With respect to competition and consumer affairs, appeals from the decision of the Director General (Competition) and Director General (Consumer Affairs) may be heard before the Competition and Consumer Appeals Tribunal.

Law stated - 9 May 2025

Competition law developments

30 | Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

Mergers and acquisitions have been relatively active in the technology sector, albeit not specifically in the telecommunications or media sectors. 6PM, a leader in health solutions acquired Compunet, while the Alert Group, an information and communications technology services company, bought Enterprise Solutions, an IT consultancy and solutions provider specialising in business and commerce systems. Malta has also partnered with Microsoft to create the Microsoft Innovation Center to focus on and promote technologies such as cloud computing, and to provide facilities to help tech start-ups to develop their products and to commercialise their ideas with a vision for Malta to become a centre for app development in the coming years.

Law stated - 9 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Nigeria's communications sector is primarily regulated by the Nigerian Communications Act 2003 (NCA) and the Wireless Telegraphy Act 1966 (WTA). The NCA established the Nigerian Communications Commission (NCC), which is charged with the responsibility of regulating the communications sector. The Minister of Communications and Digital Economy (the Minister) under the NCA is vested with the responsibilities of the formulation, determination and monitoring of the general policy for the communications sector in Nigeria with a view to ensuring, among other things, the utilisation of the sector as a platform for the economic and social development of Nigeria, the negotiation and execution of international communications treaties and agreements, on behalf of Nigeria, between sovereign countries and international organisations and bodies, and the representation of Nigeria, in conjunction with the NCC, at proceedings of international organisations and on matters relating to communications. Under the NCA, the NCC is authorised to make and publish regulations and guidelines insofar as it is necessary to give effect to the full provisions of the NCA among other reasons.

The WTA sets out the framework for regulating the use of wireless telegraphy in Nigeria.

Foreign ownership restriction does not apply to the provision of communications services in Nigeria as a company with foreign ownership, as long as it is incorporated in Nigeria, is eligible to apply for a licence to provide communications services. Under the Nigerian Investment Promotion Commission Act, a foreign national can own up to 100 per cent of a business or can invest in any business except those on the negative list. None of the communications services authorised in Nigeria is on the negative list.

Law stated - 9 April 2025

Authorisation/licensing regime

2 Describe the authorisation or licensing regime.

Under the NCA, there are two broad licensing frameworks.

- An individual licence, which is a type of authorisation in which the terms, conditions and obligations, scope and limitations are specific to the service being provided. The NCC may issue an individual licence by auction through a first come, first served beauty contest or through standard administrative procedure. Presently, there are 26 licence types in the individual licence category. Some of the activities authorised by an individual licence are internet services, fixed wireless access, unified access services, electronic directory services, internet exchange, international gateway, international cable infrastructure and landing station services, collocation services and commercial basic radio communications network services.

- A class licence, which is a type of general authorisation in which the terms and conditions or obligations are common to all licence holders. It requires only registration with the NCC for applicants to commence operation. Some of the services subject to a class licence are sales and installation of terminal equipment (including mobile cellular phones and HF, VHF, UHF radio, etc), repairs and maintenance of telecoms facilities, cabling services, telecentres, cybercafés and the operation of public payphones.

In terms of issuing a licence by an administrative procedure, an entity intending to carry out a service subject to an individual licence shall apply to the NCC in the prescribed form upon the payment of the processing or administrative fee (usually 5 per cent of the licence fee) and the licence fee, while a person intending to operate under a class licence is to submit a registration notice in the prescribed form and a registration fee of 10,000 naira to the NCC. In accordance with the NCA, a licence applicant must receive a response to the application within 90 days of submitting it. However, an offer letter is normally issued to applicants for a class licence if the application is complete. For individual licences, depending on the service and completeness of the required information, the conclusion of the process can take between four and 12 weeks. The duration of a licence depends on the type of service authorised or spectrum licensed.

The national carrier licence and international gateway licence are valid for 20 years. The unified access service licence is valid for a term of 15 years, while a digital mobile licence (DML) authorising the use of a specified mobile spectrum is valid for a term of 15 years. On the other hand, an internet service, paging, prepaid calling card and special numbering services licence are all valid for a term of five years. The licence fees payable depend on the type of service. Fees payable are fixed by the NCC and published on its website. In addition to licence fees, a prospective licensee is required to pay an administrative charge and, upon grant of the licence, a licensee shall pay an annual operating levy calculated on the basis of net revenue for network operators and gross revenue for non-network operators.

Fixed, mobile and satellite services are regulated and licensed under the NCA and to operate any of these services a licence must be obtained from the NCC. As these services are operator-specific, they fall under the individual licence category. In Nigeria, mobile telecommunications services are differentiated on the basis of whether the operator is authorised by a DML, fixed wireless access licence (FWAL) or unified access service licence. A DML authorises an operator to use appropriate equipment in a designated part of the electromagnetic spectrum and permits it to operate a network for the provision of public telecommunications services. In 2001, the NCC licensed four spectrum packages in the 900MHz and 1,800MHz bands to Mobile Telecommunications Limited (now Ntel), Econet Wireless Nigeria Limited (now Airtel) and MTN Nigeria Communications Limited for use in the provision of digital mobile services. These were later joined by Etisalat and Globacom. An FWAL authorises an operator to use appropriate equipment in a designated part of the electromagnetic spectrum for a term of five years (with renewal for a further five years) and permits it to operate a network for the provision of public telecommunications service. FWALs are granted on a regional basis to reflect the 36 Nigerian states and the federal capital territory, with operators wishing to achieve national coverage required to obtain licences in each of the licensing regions. In 2002, the NCC, in authorising FWAL services, also offered 42MHz paired in the 3.5GHz band, and a total of 28MHz paired in the 3.5GHz band across the 37 licensing regions of Nigeria to 22 new licensees.

In 2007, the NCC introduced the unified access service licence (UASL) scheme and allocated 40MHz of paired spectrum in the 2GHz band in four equal blocks of 10MHz paired spectrum. On the successful allocation of spectrum, the allottees were issued with a spectrum licence and where necessary, a UASL. The UASL authorises the holder to provide both fixed and mobile services including voice and data, and imposes special conditions requiring its holders to build and operate a telecommunications network to provide voice telephony, video services, multimedia services, web browsing, real-time video streaming, video surveillance, network gaming, email, SMS, file transfer, broadband data and location-based services, and other services that may be authorised, and that the 3G network be built and operated according to certain defined technical standards.

For broadband internet services, a wholesale wireless access service licence (WWASL) authorises the holder to construct, maintain, operate and use a network consisting of a mobile communication system, a fixed wireless access telecommunications system, or a combination of any of these systems comprising radio or satellite or their combination, within Nigeria, deployed for providing point-to-point or switched or unswitched point-to-multipoint communications for the conveyance of voice, data, video or any kind of message. The WWASL also authorises the holder to construct, own, operate and maintain an international gateway, while an infrastructure company licence authorises the holder to provide and operate on a wholesale basis an open-access metropolitan fibre network within a designated geographical area in Nigeria, in particular, among other things, to construct, maintain and operate fibre optic network facilities.

Commercial satellite services in Nigeria are regulated under the Commercial Satellite Communications Guidelines 2018 issued by the NCC. Under these Guidelines, there are two broad categories of commercial satellite service authorised:

- space segment operators (SSOs); and
- earth station operators (ESOs).

An SSO is authorised by a landing permit to beam its signal from a named geostationary satellite over the territory of Nigeria. The landing permit does not authorise the SSO to provide any other type of communications services directly to the last-mile user other than wholesale communications services to other communications operators licensed to provide services to last-mile users. The ESOs, on the other hand, are authorised under the applicable operational licence issued by the NCC to provide services to last-mile users in Nigeria.

Public Wi-Fi services are authorised pursuant to the Regulatory Guidelines for the Use of 2.GHz ISM Band for Commercial Telecoms Services. Under these Guidelines, Wi-Fi hotspots shall, inter alia, be deployed in the 2GHz industrial, medical and scientific band and must be registered and authorised by the NCC. In addition, commercial Wi-Fi hotspot operators must hold a licence for the provision of internet services.

In 2022, NCC, in a bid to deepen the penetration of communications services in Nigeria, issued the License Framework For the Establishment of Mobile Virtual Network Operators (MVNOs) in Nigeria. The MVNO licence is a five-tier classification that has distinctive services to be offered by the players in different tiers and may be implemented in any of the following ways:

- tier 1 virtual operators: these are operators who are able to offer services to their customers without owning any switching or intelligent network infrastructure. They also do not control any numbering resources. They rely on the host licensee to provide wholesale capacity to enable them to deliver products and services to customers;
- tier 2 simple facilities virtual operator: these are operators who do not have core switching and interconnect capabilities but can set up their own intelligent network (IN) to provide IN services to customers;
- tier 3 core facilities virtual operator: these are operators who rely on the host licensee to provide radio access capacity at wholesale to deliver products and services to customers. They also own and manage core network elements (switching and interconnections). Revenue generation stems from both outbound and inbound calls that give it full control over its tariff structure;
- tier 4 virtual aggregator or enabler: these are operators who are responsible for purchasing bulk capacity from a licensed network operator, and reselling it to multiple MVNOs, therefore streamlining the process of negotiating capacity agreements with said network operators. In underserved and unserved areas, it is permissible for these operators to provide core telecommunications services to customers by entering into a 'shared rural coverage agreement' with a licensed spectrum owner; and
- tier 5 unified virtual operator: these are operators who are eligible to provide any of the services under tiers 1–4.

Tier 1–4 entrants are expected to pay 5 per cent of the license fee as non-refundable administrative charges, while tier 5 entrants are to pay 50 million naira in non-refundable administrative fees prior to negotiations with the Mobile Network Operators (MNOs). MNOs are not eligible to apply for the MVNO licence.

Law stated - 9 April 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

Yes, in line with the Frequency Management Policy, an applicant for a commercial frequency licence from the NCC must also hold a commercial operating licence from the NCC (or must have submitted an application for an operating licence to the NCC). The commercial operating licence authorises the provision of a specific service for which the spectrum is intended to be used. An applicant for a frequency licence may also be given a frequency reservation pending the outcome of the processing of his or her commercial operating licence. However, the frequency licence will be subject to the successful approval of the commercial licence.

Pursuant to the provision of Spectrum Trading Guidelines issued by the NCC, radio frequency spectrum is tradable, provided such transactions comply with the eligibility criteria set out in the Guidelines.

Law stated - 9 April 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Historically, the NCC has subjected several communications markets to ex-ante regulation. For instance, in 2013, the NCC undertook a detailed study of the level of competition in the Nigerian communications market and identified the following communications markets for the purpose of ex-ante regulation:

Market segment	**Sub - segment**
Voice	• mobile telephony (including messaging); and • fixed - line telephony.
Data	• fixed data, retail data transmission services and leased lines; and • mobile data (eg, dongles, data cards, tablets, internet through mobile phone connections, eg, 3G, GPRS, Edge).
Upstream segments	• spectrum; • tower sites; • network equipment; • wholesale broadband, internet access; and • wholesale leased lines and transmission capacity.
Downstream segments	• handsets, devices (including the device operating system); and • applications, content (Includes m commerce).

The identified markets were further divided into wholesale and retail sub-segments as follows:

		Voice segment	**Data segment**	

	Upstream segment			**Downstream segment**
Services provided as wholesale by an operator to other operators	Wholesale broadband access	Wholesale voice termination on voice network		
Services provided as wholesale by an operator to other operators	Wholesale leased lines and transmission capacity	Wholesale voice termination on fixed network		
Service provided as retail by each individual operator to its consumers		Retail voice access on mobile networks	Retail broadband, internet access on mobile devices	Supply of applications, content and devices
Service provided as retail by each individual operator to its consumers		Retail access on fixed networks	Retail broadband, internet access on mobile devices at fixed location	
Service provided as retail by each individual operator to its consumers			Retail leased lines	

In that study, the NCC determined that MTN held, and Globacom and MTN collectively held significant market power for the mobile voice and upstream segment respectively. As a result of which, the NCC (in exercising its power to remedy market failure and (or) prevent anti-competitive practices under the Competition Practice Regulations) imposed on MTN as the operator with significant market power in the mobile voice market the following obligations:

- accounting separation;

- the collapse of on-net and off-net retail tariffs;
- submission of required details to the NCC; and
- a determination of the pricing principle to address the rates charged for on-net and off-net calls for all operators in the mobile voice market.

In respect of the joint dominance collectively held by Globacom and MTN in the market for the upstream segment, the NCC imposed the following obligations on both operators:

- a price cap for wholesale services and a price floor for retail services as to be determined by the NCC on a periodic basis;
- accounting separation; and
- submission of required details to the NCC.

In October 2014, the NCC reviewed its direction requiring MTN to collapse its on-net and off-net retail tariff, by approving a stipulated differential for MTN's on-net and off-net call charges.

In addition, pursuant to regulations 10 –12 of the Telecommunications Networks Interconnection Regulations 2007 issued by the NCC, one or more communications markets relating to interconnection in which a licensee has been declared dominant by the NCC would trigger the application of ex-ante regulatory obligations. In this regard, the dominant licensee would be obligated to:

- meet all reasonable requests for access to its telecommunications network, in particular, access at any technically feasible points;
- adhere to the principle of non-discrimination with regard to interconnection offered to other licensed telecommunications operators, applying similar conditions in similar circumstances to all interconnected licensed operators providing similar services and providing the same interconnection facilities and information to other operators under the same conditions and quality as it provides for itself and affiliates and partners;
- make available on request to other licensed telecommunication operators considering interconnection with its network, information and specifications necessary to facilitate the conclusion of an agreement for interconnection including changes planned for implementation within the next six months, unless agreed otherwise by the NCC;
- submit to the NCC for approval and publish a reference interconnection offer, describing interconnection offerings, broken down according to market need and associated terms and conditions including tariffs; and
- provide access to the technical standards and specifications of its telecommunications network with which another operator shall be interconnected.

In addition, the dominant licensee shall, except where the NCC has determined interconnection rates, set charges for interconnection on objective criteria and observe the principles of transparency and cost orientation. The burden of proof that charges are derived from actual costs lies with the licensed telecommunications operator providing the interconnection service to its facilities. The dominant licensee may set different tariffs,

terms and conditions for interconnection of different categories of telecommunications services where such differences can be objectively justified on the basis of the type of interconnection provided.

A dominant licensee shall also:

- give written notice of any proposal to change any charges for interconnection services in accordance with the procedure set out in the guidelines on interconnection adopted by the NCC and the provisions of the operating licence;
- offer sufficiently unbundled charges for interconnection, so that the licensed telecommunications operator requesting the interconnection is not required to pay for any item not strictly related to the service requested;
- maintain a cost-accounting system, which, in the opinion of the NCC, is suitable to demonstrate that its charges for interconnection have been fairly and properly calculated, and provides any information requested by the NCC; and
- make available to any person with a legitimate interest on request, a description of its cost-accounting system showing the main categories under which costs are grouped and the rules for the allocation of costs to interconnection. The NCC, or any other competent body independent of the dominant telecommunications operator and approved by the NCC, shall verify compliance of the dominant telecommunications operator with the cost-accounting system and the statement concerning compliance shall be published by the NCC annually.

Last, if interconnection services are not provided through a structurally separated subsidiary, the dominant licensee shall:

- keep separate accounts as if the telecommunications activities in question were in fact carried out by legally independent companies, to identify all elements of cost and revenue on the basis of their calculation and the detailed attribution methods used;
- maintain separate accounts in respect of interconnection services and its core telecommunications services and the accounts shall be submitted for independent audit and thereafter published; and
- supply financial information to the NCC promptly on request and to the level of detail required by the NCC.

It is also pertinent to note that in 2020, the NCC made a determination to impose mandatory accounting separation obligations on Airtel, EMTS, Globacom, MTN, MainOne Cable and IHS (four mobile network operators, a submarine cable operator and a collocation and infrastructure-sharing provider respectively). Although this determination did not identify (or define) any particular communications market, however, one of the key objectives of the NCC in imposing the accounting separation is to identify and prevent any undue discrimination or practices that substantially lessens competition such as cross-subsidisation, margin squeezes, etc. This determination took effect on 15 July 2020 and the licensees subject to the determination are to commence the full rollout of accounting separation by 1 January 2021. In addition, licensees with an annual turnover in excess of 5 billion naira are also subject to an accounting separation obligation pursuant

to the Guidelines on the Implementation of an Accounting Separation Framework issued by the NCC.

Law stated - 9 April 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

Under the Federal Competition and Consumer Protection Act 2018 (the Competition Act), the Competition and Consumer Protection Tribunal is vested with the authority to order the division of any undertaking by the sale of any part of its shares, assets or otherwise upon receiving a monopoly report from the Federal Competition and Consumer Protection Commission (FCCPC). The exercise of this authority is permissible if the monopoly cannot be adequately remedied under any other provision of the Competition Act or is substantially a repeat by that undertaking of conduct previously found by the Federal Competition and Consumer Protection Tribunal to be a prohibited practice. Furthermore, pursuant to the provisions of the CPR, the NCC in issuing a direction to remedy an abuse of a dominant position or an anticompetitive practice may direct a licensee to make changes in actions or activities including structural separation of services or businesses, as a means of eliminating or reducing the abusive or anti-competitive practice.

Lastly, both the FCCPC and NCC have powers under the Merger Review Regulations 2020 and the Competition Practice Regulations, respectively, to impose structural or functional separation between an operator's network and service activities in reviewing mergers that have been identified to present competition concerns within an identified relevant telecommunications market. As of the time of this writing, this power is yet to be exercised with respect to a telecommunications market.

Law stated - 9 April 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

The Universal Service Provision (USP) Fund established by the NCA is geared towards promoting the widespread availability of network services and applications services by encouraging the installation of network facilities and the provision of network services, application services and broadband penetration in unserved, underserved areas or for underserved groups within the community.

The USP Fund is financed from monies appropriated to the USP Fund by the National Assembly; contributions from the NCC are based on a portion of the annual levies paid by licensees; and gifts, loans, aids and such other assets that may from time to time specifically accrue to the USP Fund. In practice, the USP secretariat created by the NCC

is responsible for implementing and executing USP programmes and USP projects. The USP board supervises and provides broad policy directions for the management of the USP Fund.

Law stated - 9 April 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

The Numbering Regulations 2008 (the Numbering Regulations) regulate(or assignment) of numbers. In this regard, the Numbering Regulations provide a regulatory framework for the control, planning, administration, management and assignment of numbers, pursuant to section 128(1) of the NCA. Under the Numbering Regulations, the holder of a communications licence may apply in the prescribed form to the NCC to be assigned numbers (in a set of blocks) by stating:

- the name and contact details of the applicant;
- the licence under which the application is made;
- the services intended to use the assignment;
- the geographic areas for completing calls or transmitting messages to the numbers to be included in the assignment;
- the quantity of numbers requested for inclusion in the assignment;
- any particular blocks requested for inclusion in the assignment;
- the utilisation of the assignment predicted for 12 months after the grant of the assignment;
- the current utilisations of existing assignments to the applicant for the intended services;
- an indication of which, if any, portions of the application are confidential to the NCC;
- any other information that the applicant considers necessary or appropriate to justify the application; and
- any other information that the NCC may, from time to time, require to assess the application.

In making a decision on an application for an assignment, the NCC shall take into account factors including but not limited to:

- any earlier decisions about assignments to the applicant or other licensees for services similar to the intended services;
- any statements in the licence of the applicant about eligibility for providing services or being assigned numbers;
- the usage conditions;
-

the digit analysis capabilities of communications networks that are operated in Nigeria;

- the utilisation of the assignment predicted for 12 months after the grant of the assignment over the next three years;
- the current utilisations of existing assignments to the applicant for the intended services; and
- the quantity and fragmentation of blocks that have not been assigned and whether or not the licensee has failed to fulfil an obligation in the Numbering Regulations or the National Numbering Plan, or any other numbering-related obligation under the NCA, has committed a contravention of its regulatory obligation.

The Nigerian Mobile Number Portability Business Rules and Port Order Processes (the MNP Business Rules) sets out the regulatory, legal and technical framework for implementing MNP in Nigeria. The NCC has also issued the Mobile Number Portability Regulations 2014 to provide a regulatory framework for the operation of MNP in Nigeria. Under the terms of the MNP Business Rules, MNP is obligatory for all mobile network operators and is currently available across only global systems for mobile networks (although number portability is intended to be implemented in phases that will cover code division multiple access, fixed networks and location).

Under the MNP Business Rules, MNP is 'recipient led'. To initiate a porting request, the recipient operator would receive a porting request from a subscriber to port their number. The recipient operator, number portability clearinghouse and donor operator then exchange messages to validate the porting request. Porting is free and is normally completed within 48 hours.

A port request, however, can be rejected for a number of reasons including where the number is not included in the Nigerian numbering plan, where the number was ported within the last 90 days, where the number is not registered in the subscriber information database, and where the number is already subject to a pending port request.

Law stated - 9 April 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Yes, the NCA requires each licensee to prepare a consumer code for their respective customers and such consumer code shall be subject to prior approval and ratification by the NCC. The individual consumer code governs the provision of services and related consumer practices applicable to the licensee. Where the NCC designates an industry body to be a consumer forum, any consumer code prepared by such industry body shall be subject to prior approval and ratification by the NCC. A consumer code prepared by a consumer forum, the NCC or licensees shall as a minimum contain model procedures for:

- reasonably meeting consumer requirements;
-

the handling of customer complaints and disputes including an inexpensive arbitration process other than a court;

- procedures for the compensation of customers in the case of a breach of a consumer code; and
- the protection of consumer information.

The 2024 amendment to the Consumer Code of Practice Regulation (the Consumer Code Regulations) mandates that, within 30 days of approval by the NCC, a licensee must publish its approved Individual Consumer Code on its website, in a national newspaper, and on at least one social media platform of its choice. The approved code shall take effect from the date of its publication.

The provisions of the Competition Act, the NCA and (or) the Competition Practice Regulations may limit the application of certain customer terms and conditions deemed to be undermining consumer rights or anticompetitive in the communications sector. Also, the Enforcement Processes Regulations require every licensee to submit the contents and representations contained in any promotions of products or services to the NCC for its prior approval. Failure to obtain the required approval shall constitute a contravention under these Regulations.

Law stated - 9 April 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

The Internet Industry Code of Practice (the Internet Code) issued by the NCC on 26 November 2019 sets out the obligation of an internet access service provider (IASP) regarding the control and (or) prioritisation of the data that it delivers and other obligations regarding net neutrality. In this regard, the Internet Code inter alia:

- prescribes measures that seek to guarantee the rights of internet users to an open internet;
- imposes specific transparency obligations on IASPs with respect to performance, technical and commercial terms of its internet access service in a manner that is sufficient for consumers and third parties to make informed choices regarding their uses of such services;
- imposes a positive obligation on IASPs when providing internet access service, to treat all traffic equally, without discrimination, restriction or interference, independently of its sender or receiver, content, application or service, or terminal equipment;
- bars IASPs from blocking lawful content on the internet, unless under the condition of reasonable network management;
- bars IASPs from degrading or impairing lawful internet traffic unless under the condition of reasonable network management;

- bars IASPs from engaging in paid prioritisation;
- prescribes the circumstance in which zero-rating is permissible; and
- sets out circumstances that warrant the use of reasonable network management practices.

In addition, the Guidelines for the Provision of Internet Service, the licence for the provision of internet service, the UASL and the WWASL do, however, impose some non-discriminatory obligations on an IASP and holders of these licences. In this regard, an IASP and the respective licensees are required not to show (whether in respect of charges or other terms or conditions applied or otherwise) undue preference to or to exercise undue discrimination against any particular person in respect of the provision of a service or the connection of any equipment approved by the NCC.

Law stated - 9 April 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

The National Information Technology Development Agency (NITDA) has issued the Code of Practice for Interactive Computer Services Platforms/Internet Intermediaries (Code of Practice for Computer Platforms). The Code establishes best practices for online platforms and internet intermediaries operating in Nigeria and aims to enhance the safety of the digital ecosystem for both Nigerians and non-Nigerians within the country. Additionally, it outlines measures to combat online harms, including disinformation and misinformation, and adopts a co-regulatory approach to implementation and compliance.

The Code of Practice for Computer Platforms imposes several obligations on online platforms and internet intermediaries, including:

- compliance with Nigerian laws, including refraining from deploying or modifying their platforms in a manner that undermines or interferes with the enforcement of the law;
- adherence to court orders requiring the provision of information or assistance to authorised government agencies for the purposes of investigation, cybercrime prevention, or prosecution; and
- prompt removal of unlawful content within 48 hours of receiving a takedown notice from an authorised government agency.

In addition, platforms categorised as 'Large Service Platforms' — those with more than 1 million registered users — must also:

- incorporate as a legal entity in Nigeria;
- maintain a physical contact address within Nigeria;
- appoint a Liaison Officer to serve as a communication channel between the platform and the government;
-

ensure adequate human oversight of automated tools to enhance accuracy, mitigate bias and discrimination, and uphold users' freedom of expression and privacy; and

- provide users, upon request, with information on why they receive specific advertisements.

Furthermore, the NITDA reserves the right to extend those obligations to platforms with fewer than 1 million registered users if deemed necessary to safeguard Nigeria's sovereignty, security, public order, foreign diplomatic relations, or national integrity.

As of the time of this writing, there have been no recorded enforcement actions under the Code of Practice for Computer Platforms.

Law stated - 9 April 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

Yes, in addition to the application of regulatory obligations ordinarily applicable to other categories of communications licensees, the holder of the WWASL will be required by the licence to, among other obligations, roll out services at least as follows:

- three state capitals in year one;
- four additional state capitals in year two;
- six additional state capitals in year three;
- 12 additional state capitals in year four;
- 12 additional state capitals in year five; and
- two-thirds of all local government headquarters in the remaining licence period.

Also, a WWASL requires the holder to supply customer premises equipment adapted in such a way as to reasonably accommodate the needs of hearing-impaired individuals.

Notwithstanding the application of the USP fund for the facilitation of broadband penetration in Nigeria, there are other NCC-initiated projects such as the Wire Nigeria project aimed at facilitating the rollout of fibre-optic cable infrastructure in which subsidies are based on per kilometre (km) of fibre and incentives to encourage the rapid deployment of non-commercially viable routes are provided. The State Accelerated Broadband Initiative is aimed at stimulating the demand for internet services and driving affordable home broadband prices where subsidies on terminal equipment based on broadband infrastructure deployed in state capitals and urban and semi-urban centres are provided to operators. Also, under the ongoing Open Access Model for Next Generation Fibre Optic Broadband Network, there shall be one-off government financial support to facilitate the rollout of the infrastructure companies. This 65 billion naira financial support will be based on meeting pre-identified targets at certain points in time during the rollout of the broadband infrastructure phase.

Law stated - 9 April 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

Part VI of the General Code (in appendix I of the Consumer Code Regulations) sets out the responsibilities of a licensee in the protection of individual consumer information. These responsibilities stipulate that a licensee may collect and maintain information on individual consumers reasonably required for its business purposes and that the collection and maintenance of such information on individual consumers shall comply with the following principles:

- fairly and lawfully collected and processed;
- processed for limited and identified purposes;
- relevant and not excessive;
- accurate;
- not kept longer than necessary;
- processed in accordance with the consumer's other rights;
- protected against improper or accidental disclosure; and
- not transferred to any party except as permitted by any terms and conditions agreed with the consumer, as permitted by any permission or approval of the NCC, or as otherwise permitted or required by other applicable laws or regulations.

Licensees are required by the Consumer Code Regulations to adopt similar provisions guaranteeing the same level of protection (or higher) in the production of their own individual consumer codes.

In addition, licensees are required by these responsibilities to meet generally accepted fair information principles including:

- providing notice as to what individual consumer information they collect, and its use or disclosure;
- the choices consumers have with regard to the collection, use and disclosure of that information;
- the access consumers have to that information, including to ensure its accuracy;
- the security measures taken to protect the information; and
- the enforcement and redress mechanisms that are in place to remedy any failure to observe these measures.

Furthermore, Nigeria has enacted the Nigeria Data Protection Act 2023 (the NDPA) . The NDPA governs the processing of personal data in Nigeria, outlining the lawful basis for such processing, the rights of data subjects, the obligations of data controllers, and the conditions under which cross-border transfers of personal data are permissible. The Act is

enforced by the Nigerian Data Protection Commission (NDPC) and applies to all sectors of Nigeria's economy, including the communications sector.

Law stated - 9 April 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

Yes. The Cybercrimes Act 2015 (the Cybercrime Act) and the and the Cybercrimes (Amendment) Act 2024 provides a unified and comprehensive legal framework for the prohibition, prevention, detection, prosecution and punishment of cybercrimes in Nigeria. The Cybercrimes Act also ensures the protection of critical national information infrastructure and promotes cybersecurity and the protection of computer systems and networks, electronic communications, data and computer programs, intellectual property and privacy rights.

In addition, the National Information Systems and Network Security Standards and Guidelines 2013 and the Nigerian Cybersecurity Framework 2019 issued by NITDA prescribe mandatory minimum standards on seven primary areas of network security and cyber forensics, which are:

- categorisation of information;
- minimum security requirements;
- intrusion detection and protection;
- protection of object-identifiable information;
- securing public web servers;
- system firewall; and
- cyber forensic.

The Framework goes on to further recommend best practice guidelines for public- and private-sector organisations for instituting measures for enshrining cybersecurity culture and enthronement of cyber-resiliency in Nigeria.

Law stated - 9 April 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

Currently, there is no specific legislation in Nigeria that directly addresses big data. However, the Cybercrimes Act 2015 has as one of its primary objectives the promotion of cybersecurity and the protection of computer systems, networks, electronic

communications, data, computer programs, intellectual property, and privacy rights. Although the Act does not explicitly use the term 'big data', it defines 'data' as 'representations of information or concepts that are being prepared or have been prepared in a form suitable for use in a computer'. This definition encompasses various forms of digital data, including big data. The Cybercrimes Act imposes several obligations on public and private entities that provide communication services to users through computer systems, electronic communication devices, mobile networks, and entities that process or store computer data on behalf of such communication services or users. These obligations relate to the retention and confidentiality of data. However, we are not aware of any enforcement initiatives that have occurred since the enactment of the Cybercrimes Act in 2015 regarding big data.

Law stated - 9 April 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

Yes. The Guidelines on Nigerian Content in ICT issued by NITDA require information and communications technology companies and data and information management firms in Nigeria to host, respectively, all subscriber and consumer data and government data locally within the country and further provide that they shall not for any reason host any government data outside the country without express approval from NITDA and the Secretary to the government of the federation.

In addition, both the NDPA and NDPR establish the conditions governing the permissible cross-border transfer of personal data in Nigeria.

Law stated - 9 April 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

In 2024, the Honourable Minister of Communications, Innovation and Digital Economy launched a landmark initiative aimed at expanding Nigeria's connectivity backbone through the deployment of an additional 90,000 kilometres of fibre-optic cable. This will increase the nation's total fibre-optic coverage from approximately 35,000km to a minimum of 125,000km. The primary objective of this initiative is to enhance internet access and connectivity across the country, with a particular focus on rural and underserved areas. By improving broadband infrastructure, the project aims to foster innovation, enable e-commerce, and expand access to digital services. To facilitate the implementation and delivery of this initiative, the president has granted approval for the establishment of a special purpose vehicle (SPV). The project is expected to be executed over a period of three to five years.

As part of broader efforts to accelerate broadband penetration, the Minister has also constituted the National Broadband Alliance for Nigeria (NBAN). NBAN brings together stakeholders from government agencies, the private sector, civil society, and non-profit organisations. Key initiatives under NBAN include:

- ensuring reliable broadband infrastructure in all 774 local government areas;
- implementing targeted digital literacy programmes;
- promoting access to affordable digital devices, especially in underserved communities;
- establishing public access points to provide free or subsidised internet services;
- supporting the development and dissemination of local content to encourage broadband adoption; and
- advancing policy advocacy and research to sustain broadband expansion and equitable access.

Additionally, the NCC has issued new regulations and amended existing ones to enhance regulatory oversight and consumer protection in the telecommunications sector. These include:

- the Nigerian Communications (Consumer Code of Practice) Regulations 2024;
- the Nigerian Communications (Type Approval) Regulations 2024; and
- the Nigerian Communications (Quality of Service) Regulations 2024.

Furthermore, in the recent decision of *Emeka Nnubia v Honourable Minister of Industry, Trade and Investment & Others* (Suit No. FHC/L/CS/1009/2024), the Federal High Court affirmed the powers of the FCCPC to enforce competition and consumer protection laws within the telecommunications sector. The judgment clarifies that the NCC does not have exclusive jurisdiction in this regard, thereby reinforcing the FCCPC's concurrent regulatory mandate.

Law stated - 9 April 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The National Broadcasting Commission Act (the NBC Act) regulates the broadcasting sector in Nigeria. The NBC Act also established the National Broadcasting Commission (NBC), which is responsible for regulating the broadcasting industry. There is also the Nigeria Broadcasting Code (BC), which was issued by NBC in the exercise of its power under the NBC Act. The BC represents the minimum standard for broadcasting in Nigeria.

Law stated - 9 April 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Yes, the ownership of broadcasting networks is restricted. The NBC Act requires the NBC to satisfy itself when granting a broadcasting licence that the applicant can demonstrate to the satisfaction of the NBC that he or she is not applying on behalf of any foreign interest. The NBC is also prohibited from granting a licence to either a religious organisation or a political party. Foreign investors can therefore participate in broadcasting activities, provided that the majority of shares in a broadcasting company are held by Nigerians.

In terms of cross-ownership in the broadcasting industry, the NBC Act provides that a person is prohibited from having 'controlling shares in more than two of each of the broadcast sectors of transmission'. Apart from the provisions in the NBC Act, there are no regulations regarding cross-ownership of media companies.

Law stated - 9 April 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

To operate a radio, sound, television, cable or satellite station in Nigeria, an application in the prescribed form is addressed to the Director-General (DG) of the NBC requesting approval to purchase a set of application forms indicating the licence category and proposed location. If granted, the applicant would be required to purchase the application form at the cost of 50,000 naira and submit the completed application form to the DG. The form is accompanied by:

- a certificate of incorporation;
- a certified copy of the company's memorandum and articles of association;
- an engineering design of systems, including a feasibility study;
- a letter of undertaking to abide by the terms of the licence; and
- a letter of reference from the company's bankers.

Section 9(1) of the NBC Act sets out the criteria used by the NBC in the grant of a broadcast licence and these require the applicant to be a corporate body registered in Nigeria or a broadcasting station owned, established or operated by the federal, state or local government. The NBC is also required to satisfy itself that the applicant is not applying on behalf of any foreign interest. If the NBC is satisfied with the application, it will make a recommendation through the Minister of Information to the President for the grant of a licence.

The licence fees for the various broadcasting services are as follows:

S/N	Type	Application form fee (N)	Licence fee (naira)	Initial duration	Geographical location	Scope of services
1.	FM radio (federal, state, and private radio station)	50,000	15,000,000	5 years	Every state excluding Lagos, Port Harcourt, and Federal Capital Territory (FCT)	Radio broadcasting services
2.	FM radio (federal, state, and private radio station)	50,000	20,000,000	5 years	Lagos, Port Harcourt, and FCT	Radio broadcasting services
3.	Community radio station	10,000	500,000	5 years	All states including the FCT	Radio broadcast by communities in all states including the FCT
4.	Campus radio station	50,000	1,000,000	5 years	All states including the FCT	Radio broadcast by universities
5.	Private TV station (direct satellite	50,000	10,000,000	5 years	All states including the FCT	Satellite television broadcast

	broadcast (DSB))					
6.	Multi - channel TV station (direct to home (DTH))	50,000	10,000,000	5 years	All states including the FCT	Multi - channel television broadcast
7.	Internet protocol TV station (IPTV)	50,000	10,000,000	5 years	All states including the FCT	Internet television broadcast
8.	Public TV station	50,000	10,000,000	5 years	All states including the FCT	Television broadcast by the federal or state government
9.	Dealer (wholesale)	10,000	120,000	1 year	All states including the FCT	-
10.	Importer (wholesale)	10,000	120,000	1 year	All states including the FCT	-
11.	Retailer	10,000	120,000	1 year	All states including the FCT	-

There is no specific timescale for the grant of a licence.

Law stated - 9 April 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

The NBC Act and the BC regulate the broadcasting of programmes and the minimum local and foreign programme content. Under the BC, foreign content is permissible provided it conveys intrinsic relevance to the education, information and entertainment of the Nigerian citizenry. The BC stipulates that a broadcaster shall ensure that the selection of foreign programmes reflects the development needs of the Nigerian nation and ensures respect for Nigerian cultural sensibilities. In addition, with the exception of special religious and sports programmes or events of national importance, Nigerian broadcasters shall not relay foreign broadcasts live on terrestrial platforms.

In terms of characterising how a broadcasting programme may qualify as local content, the amendment to the 6th edition of the BC (the amendment) issued by the NBC in 2020 provides that:

- the producer of the programme must be Nigerian, residing in Nigeria;
- the directors of the programme are Nigerian; or
- the authors of the programme are Nigerian.

In addition, it goes on to provide that:

- 75 per cent of the leading authors and major supporting cast, including voice actors, or on-screen presenters appearing in the programme are Nigerian;
- a minimum of 75 per cent of programme expenses and 75 per cent of post-production expenses are paid for services provided by Nigerians or Nigerian companies, which may be obtained from programme commission, licensing, advertising-funded programming grants, co-funding arrangements, commercial sponsorship and financing initiatives, all of which must not be subject to 'foreign ownership or arbitrary interference'; and
- where the production is a collaboration with a foreign entity, the producer shall ensure that Nigeria production locations, talents, skills, sets, etc, constitute at least 75 per cent of the entire production.

The broadcaster is required by the BC to ensure that all productions targeted at the Nigerian market must meet a minimum of 60 per cent local content requirement.

The local content requirement applies to all categories of programming including but not limited to fiction, series, serials, films, documentaries, arts and educational programmes, news, sports events, games, advertising, teleshopping or teletext services. Last, a broadcaster is required by the local content rules in the amendment to source its local content from independent producers where it is not a direct production of the broadcaster. Failure to comply with the local content rules is a Class B breach under the BC and will attract sanctions.

Law stated - 9 April 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Broadcast media advertising is regulated by the NBC Act, the BC and the Advertising Regulatory Council Act 2022 (the ARCON Act). Under the ARCON Act, an advertisement in any medium directed at or targeting the Nigerian market must be submitted for approval by the Advertising Standards Panel before exposure.

Online broadcasting is subject to the BC to the extent that it is transmitted by an online or web broadcaster operating in Nigeria, and it shall additionally conform to the provisions of the BC on programming standards.

Law stated - 9 April 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Beyond the local content obligations mandated by the BC, there are no other obligations that specify the basic package of programmes, and (or) in relation to must-carry. At present. there is no mechanism for financing local content obligations in Nigeria. However, there is a local content development fund into which a subscription broadcaster shall make a mandatory payment, where it fails to comply with its local content obligations regarding its subscription service.

Law stated - 9 April 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

Internet radio and broadcasting streaming signals from and into Nigeria require a licence from NBC. In practice, most of the internet radio stations operating in Nigeria already have a radio (or another broadcast) licence issued by NBC. The BC also requires the local content for this category of licence to be 60 per cent. The regulations and conditions governing news, programmes, advertising and sponsorship in relation to other forms of broadcasting or broadcast licence are also applicable to internet broadcasting.

Law stated - 9 April 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The first phase of the digital switchover (DSO) was successfully launched in five states and the Federal Capital Territory in Nigeria between April 2016 and February 2018. According to the timeline released by the NBC in March 2021, the second phase of the DSO will commence in Lagos state on 29 April 2021 and be extended to four other states by 12 August 2021. Although the third and final phase of the DSO was supposed to commence in December 2021 and conclude by 8 December 2022, there have been technical hitches that pushed back the implementation of the final phase of the DSO.

The Nigerian Communications Commission (NCC) is proposing that the radio frequencies freed up should be reallocated to mobile broadband.

Law stated - 9 April 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

Yes. Broadcasters are required to use the spectrum assigned to them in accordance with the technical specifications contained in the licence conditions.

Law stated - 9 April 2025

Media plurality

26 | Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

The BC incorporate some provisions that are consistent with media pluralism. Some of these provisions are that the BC requires broadcasters to ensure that all sides to any issue of public interest are equitably presented for fairness and balance and be above inherent biases, prejudices and subjective mindsets. In addition, the BC provides that panellists in discussion programmes are expected to reflect various viewpoints, and for political broadcasts, broadcasters are to accord equal airtime to all political parties or views, with particular regard to the duration and the particular time within which such programmes can be broadcasted during political campaign periods.

Law stated - 9 April 2025

Key trends and expected changes

27 | Provide a summary of key emerging trends and hot topics in media regulation in your country.

In the payTV product market, the FCCPC has continued to exercise regulatory oversight, particularly concerning MultiChoice, a prominent payTV provider, which the FCCPC

directed to maintain current DStv and GOtv subscription package prices pending an investigation into a proposed hike. However, MultiChoice defied the directive and implemented the price increase on 1 March 2025. In response, the FCCPC filed charges at the Federal High Court, Lagos, against the company and its CEO. MultiChoice's actions were deemed to obstruct FCCPC's inquiry, violate compliance directives, and attempts to mislead the FCCPC — offences under sections 33(4), 110, and 159(2) of the FCCPA. The matter is currently before the Federal High Court, Lagos, which has fixed date of 8 May 2025 for judgment.

The FCCPC's recent actions — particularly its summons and enforcement proceedings against MultiChoice over subscription price increases demonstrate its continued focus on the pay-TV sector and its significant impact on consumers given the growing public frustration and outcry over frequent cost increases and alleged consumer exploitation in the pay-TV services market.

Law stated - 9 April 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The Nigerian Communications Commission (NCC) and the National Broadcasting Commission (NBC) regulate the communications and broadcast sectors, respectively, while the Federal Competition and Consumer Protection Commission (FCCPC), created by the Federal Competition and Consumer Protection Act 2018 (the Competition Act) is the lead antitrust regulator in Nigeria, and is a separate institution from the NCC and NBC. The FCCPC is charged with the administration and enforcement of the provisions of the Competition Act including the approval of mergers and the protection and promotion of consumer interests.

However, it is pertinent to note that although the Competition Act establishes a concurrent jurisdiction between the FCCPC, and both the NCC and NBC in matters of competition enforcement, the FCCPC will have precedence over both the NCC and NBC and according to the provision of the Competition Act, all appeals or request for review of the exercise of the competition power of the NCC and NBC shall in the first instance be heard and determined by the Competition Commission before such appeals can proceed to the Federal Competition and Consumer Protection Tribunal (FCCPT) established under the Competition Act.

Law stated - 9 April 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

Decisions of federal regulatory and administrative bodies such as the NCC and the NBC are subject to judicial review by the Federal High Court (FHC) and can be litigated up to the Supreme Court. Decisions can be challenged on the grounds of lack of authority, breach of the rules of natural justice, error of law on the face of the record and that the decision has been obtained by fraud. Under the National Communications Act, a person dissatisfied or whose interest is adversely affected by any decision of the NCC must comply with a two-stage process within the stipulated time frame, before proceeding to the FHC for a review of the decision of the NCC. A person who is dissatisfied with the decision of the NCC will request that the NCC provide a statement giving the reason for the decision. Upon receipt of the NCC statement of reasons, the person may ask the NCC in writing for a review of its decision specifying the reason and basis for its request. The NCC, upon receipt of the written submission, shall meet to review its decision, taking into consideration the submission of the dissatisfied person. It is only after the person has exhausted this two-stage process that he or she can proceed to court for a review of the NCC's decision.

Appeals concerning competition or consumer protection decisions made by the NCC or the NBC shall first be brought before the FCCPC in accordance with the Competition Act. Any party aggrieved by the FCCPC's decision — whether in the exercise of its appellate jurisdiction over NCC or NBC decisions or in the exercise of its original jurisdiction — may appeal to the FCCPT. Further appeals from the FCCPT shall be made to the Court of Appeal, with the possibility of a final appeal to the Supreme Court.

Law stated - 9 April 2025

Competition law developments

30 | Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

On 19 July 2024, the FCCPC imposed an administrative penalty of US$220 million on Meta Platforms Inc (Meta), the parent company of WhatsApp LLC (WhatsApp), for violations of the FCCPA and the now-repealed Nigeria Data Protection Regulation 2019 (the NDPR). According to the FCCPC's investigation report, which formed the basis of the sanction, several key findings were made:

- WhatsApp's privacy policy was not compliant with the provisions of the NDPR, thereby preventing consumers (data subjects) from providing valid and informed consent as required by law;
- WhatsApp engaged in the excessive processing of personal data in contravention of the data minimisation principle under the NDPR; and
- the unlawful processing of personal data by WhatsApp amounted to an abuse of its dominant position in the market for contact-based instant messaging services.

This decision marks a significant development in digital market regulation in Africa. It is the first instance of an African competition authority enforcing competition law in the

digital economy and imposing a substantial administrative penalty. The FCCPC's approach underscores three critical regulatory takeaways as follows.

- Competition enforcement in digital markets: The decision demonstrates the willingness and capacity of a competition authority in Africa to address competition concerns in the digital economy.
- Data privacy as consumer protection: The FCCPC interpreted non-compliance with data protection obligations as a violation of a consumer protection legislation, thereby justifying enforcement under the FCCPA.
- Intersection of data protection and competition law: The regulatory decision establishes that unlawful processing of personal data may constitute an abuse of dominance under competition law, setting a precedent for future regulatory actions in data-driven markets.

As of the time of writing, WhatsApp and Meta have appealed this decision to the FCCPT.

Law stated - 9 April 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Communications services enterprises are generally viewed as public services subject principally to provisions of the Philippine Constitution, the Public Service Act (Commonwealth Act No. 146, as amended by Republic Act No. 11659) and the Public Telecommunications Policy Act (Republic Act No. 7925). The Philippines has other statutes and regulations that specifically apply to the communications sector, such as the Radio Control Act (Act No. 3846, as amended), the SIM Registration Act (Republic Act No. 11934) and the issuances of the National Telecommunications Commission (NTC).

The NTC has supervision and control over telecommunications and broadcasting entities and generally has the mandate to administer and implement laws on the licensing and operations of the covered entities. The NTC is an attached agency of the Department of Information and Communications Technology (DICT). The DICT is mandated to be the primary policy, planning, coordinating, implementing and administrative entity of the executive branch that will plan, develop, and promote the national Information and communication-technology development agenda.

Prior to the 2022 amendment of the Public Service Act, telecommunications and related services were classified as public utilities and subject to the Philippine Constitution's nationality restrictions, which specifically provide that public utilities may only be owned and operated by Filipino citizens or entities that are 60 per cent owned and controlled by Filipinos.

Under the amendment, public telecommunications entities (PTEs) are no longer classified as public utilities subject to the constitutional requirements on Philippine nationality, but as a public service owning critical infrastructure. The law defines critical infrastructure as physical or virtual systems and assets so vital to the Republic of the Philippines that the incapacity or destruction of such systems or assets would have a detrimental impact on national security. Thus, under the new law, PTEs may be 100 per cent foreign owned, provided reciprocity conditions are met. However, Filipino ownership requirements may still be imposed under certain conditions such as when the reciprocity requirement is not met, if the investors are sovereign wealth funds and independent pension funds of states, and if the investors are entities controlled by or acting on behalf of a foreign government or foreign state-owned enterprises.

Notably, under the Public Service Act's Implementing Rules and Regulations, 'control' is said to exist not only when an entity owns more than 50 per cent of the capital or voting rights, but also when it can substantially influence or direct another entity's decisions, such as through voting agreements, power to direct or govern the financial and operating policies of the entity, appointment/removal powers over the governing board, ownership/access to assets, or ability to interfere with management/control over the entity.

Another telecommunications law-related change under the PSA amendment is the carving out of a value-added service (VAS) from telecommunications. Previously, VASs were considered PTEs under the Public Telecommunications Policy Act.

The amendments to the Public Service Act do not appear to remove the requirement for PTEs to obtain a legislative franchise and other licences from the NTC, thus it seems PTEs would still have to obtain a legislative franchise from the Philippine Congress, as well as certain operating licences.

The discussions set out here regarding licensing and permitting requirements for PTEs and VAS providers are in line with the prevailing regulations prior to the amendment of the PSA. There is no indication yet whether regulators will issue new or revised guidelines to align licensing and other requirements with the amendments.

Broadcasting entities are considered mass-media enterprises and, under the Philippine Constitution, must be wholly owned and managed by Filipinos.

Law stated - 31 May 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

The provision of all types of public telecommunications services, including fixed, mobile and satellite services, is subject to the franchise and licensing requirements.

A PTE would need to be a corporation established in the Philippines with a franchise granted by the Philippine Congress. This franchise is in the form of a law, and therefore its grant goes through the same process as other types of statutes. The typical term of a congressional franchise is 25 years and is renewable upon application.

An enfranchised PTE would also have to obtain certain principal licences from the NTC. These are:

- a certificate of public convenience and necessity (CPCN). The application process is quasi-judicial, where an applicant files a petition for the CPCN issuance, and must prove its legal, technical and financial capability, as well as the feasibility of offering the contemplated service. The parameters and specific requirements utilised by the NTC to assess an application will depend on the service being proposed. Parties, such as entities engaged in the same service, may participate in the proceeding to oppose the application. Typically, it takes up to 10 years for the NTC to act on the petition. CPCNs usually have a term of 10 years and are renewable upon application. They are non-exclusive and may be amended. A nationwide application for a CPCN has a filing fee of 330,981 Philippine pesos;
- provisional authority (PA). The PA is an authority to operate issued to a CPCN applicant once it successfully proves that it has the financial and technical capacity to deliver its services to the public. The PA is issued pending the full assessment of the application for, and issuance of, the CPCN. The holder of a PA can already operate the service even if the CPCN petition is still pending. A PA's term is 18 months and is renewable upon application; and

- frequency allocation. This is typically applied for and allocated after the issuance of the PA or CPCN. An application is made using the NTC-prescribed form, supported by technical specifications of the network and of the equipment to be used. The frequencies shall then be allocated upon verification that they are available or are properly allocated within the National RF Allocation Table and that the applicant can properly utilise them. Frequency bands assigned are subject to an annual spectrum user fee, depending on the frequency band, channel and coverage applied for.

On satellite services, and in general, enfranchised, and certificated PTEs, as well as VAS providers and internet service providers (ISPs) duly registered with the NTC, are allowed direct access to all satellite systems, whether fixed or mobile, international or domestic. Access is subject to the satellite operator's commercial presence in the Philippines, and the jurisdiction where the operator has been established as having reciprocal terms with the Philippines.

A VAS provider need not obtain a congressional franchise but must obtain a certificate of registration (CoR) from the NTC, provided it does not set up its own network. VAS providers may be 100 per cent foreign-owned. VAS are services that improve upon the quality and functionality of services ordinarily offered by PTEs, such as audio conferencing and videoconferencing. The CoR, which specifies the VAS that will be rendered, is valid for five years and may be renewed upon application. An application for a VAS CoR has a filing fee of 300 Philippine pesos. Further, there is an annual registration fee of 6,000 Philippine pesos for the first five services registered and an additional 1,000 Philippine pesos for each additional service.

The DICT has issued the Implementing Rules and Regulations on the national policy for expanding the provision of internet services through inclusive access to satellite services (DICT Circular No. 02 s 2021). It provides for the licensing and regulation of satellite systems providers and operators (SSPOs). Under the regulatory regime, SSPOs desiring to provide satellite services by directly engaging with ISPs, VAS providers, enfranchised telecommunications entities or PTEs, and broadcast service providers (authorised entities) shall:

- have an adequate digital presence in the Philippines, such as having a readily accessing website with sufficient content and information;
- have an adequate local presence by setting up a branch or representative office, having an institutional agent or official distributor, or a combination of such modes;
- have the capacity, coverage and satellite footprint in the Philippines for the purposes of providing adequate satellite services to covered areas;
- be accredited by the DICT; and
- be a national of a country that does not prohibit Philippine satellites to operate within its territories and does not prohibit its citizens or subjects to access Philippine satellite systems.

In relation to the accreditation requirement, SSPOs shall apply for a DICT accreditation certificate. An application is made using the DICT-prescribed form, with the company profile and documentary proof of meeting the requirements listed above. The DICT accreditation certificate is valid for five years and is subject to renewal upon application.

Other requirements for ISPs, VAS providers, PTEs, and broadcast service providers shall also apply to SSPOs desiring to do business as authorised entities in addition to obtaining a DICT accreditation certification.

Independent tower companies (ITCs) must also secure a CoR from the DICT to own, construct, manage, or operate passive telecommunications tower infrastructures (PTTIs). The certificate is valid for five years and may be renewed upon application. The minimum qualifications for ITCs include relevant construction experience, registration, a licence, and financial capacity of at least a contractor falling under category A of the Philippine Contractors Accreditation Board (PCAB).

Law stated - 31 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

Use of spectrum allocated by the NTC can only be under services allowed in the PA or CPCN that are granted to the PTE. In this regard, the Public Telecommunications Policy Act and NTC regulations require periodic review of radiofrequency spectrum allocation and assignment. To optimise the use of the radio spectrum, regulations require radio frequency (RF) to be assigned to those who will use it efficiently and effectively to meet public demand for telecommunications services. Regulations provide for the recall of RF unused for at least one year from the date of issuance of the licence. RF licences are granted according to use permitted by the National RF Allocation Table, the service licensed to the grantee and the radio equipment to be used.

An RF spectrum is not tradable or assignable. The NTC has exclusive authority to allocate an RF spectrum to specific services and assign them to qualified entities. Unless the NTC permits otherwise, an RF spectrum may only be used for services indicated in the National RF Allocation Table and may not be transferred to another entity. However, in exceptional instances, the NTC may allow co-use of an RF spectrum.

Law stated - 31 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Billing and rate-fixing are subject to ex-ante regulation. The NTC is empowered to regulate and fix rates of telecommunications entities upon due notice and hearing. Further, the NTC regulates the manner and procedure of billing subscribers of telecommunication providers. However, rates for VAS are deregulated.

Concerning accounting separation, the Public Telecommunications Policy Act provides that where a single entity spans more than one category of telecommunications service,

a separate book of accounts must be maintained for each category or specialised classification. Separate books of accounts must also be maintained for VAS. There is also an Internet Consumer Protection and Net Neutrality bill currently pending in Congress that would require separate books of accounts between different data transmission segments, a violation of which would give rise to a presumption of anticompetitive cross-subsidisation.

The public Telecommunications Policy Act also provides that where PTEs provide VAS, other VAS providers must not be discriminated against in rates nor denied equitable access to their facilities.

Law stated - 31 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

Generally, PTEs may engage in activities as long as they possess the required franchise and operating licences. Notably, however, pursuant to DICT Department Circular No. 008 s 2020, mobile network operators (MNOs) and related parties are prohibited from holding equity in ITCs, which may be regarded as a form of structural separation.

The Public Telecommunications Policy Act also prohibits a single franchise authorising an entity to engage in both telecommunications and broadcasting. This was seen as a move to prevent entities from monopolising available resources, such as available frequencies.

Law stated - 31 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

Universal service obligations (USOs) became a statutory obligation in the early 1990s for international gateway facility (IGF) and cellular mobile telephone system (CMTS) operators in the form of mandatory deployment of a required number of local exchange lines or public calling offices. These operators were expected to subsidise the costs of providing local exchange services from revenues generated from their IGF and CMTS operations. But the implementation of USOs through the NTC's Service Area Scheme has generally become viewed as unsustainable owing to falling revenue from international services, the weak demand for local exchange carriers in rural areas, and the growth of mobile telephony. The NTC has since generally eased the USO's enforcement but has extended the USO to 3G licensees. The NTC now allows USO compliance through an equivalent number of telecentres (ie, facilities providing voice, internet, or any telecommunications service) in lieu of local exchange lines or public calling offices.

Moreover, the Free Internet Access in Public Places Act (Republic Act No. 10929) requires that no fees be collected from users to connect to the public internet access points in public places such as government offices, public educational institutions, public hospitals, public airports and seaports and public transport terminals. Recently, the DICT has adopted rules regarding common towers to improve telecommunications services throughout the country. Moreover, the Philippine President has recently signed an executive order liberalising access to satellite services for enfranchised PTEs, VAS providers and ISPs. Further, DICT Circular No. 02 s 2021 authorises entities to have direct access to all satellite systems duly accredited in the Philippines. Authorised Entities shall also be allowed to access and use associated spectrum to effectively expand the provision of internet services through inclusive access to satellite services, for any or all segments of their broadband network.

Law stated - 31 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

Number allocation in the Philippines is administered by the NTC and follows an open telephone numbering plan and open dial plan. On the other hand, the Mobile Number Portability Act (Republic Act No. 11202) was signed into law on 8 February 2019, requiring a licensed telecommunications provider to allow mobile number portability to all qualified subscribers free of charge. A qualified subscriber must be the assignee of the mobile number used in a device that is not locked to a particular telecommunications provider and must not have any outstanding financial obligation with the donor provider. The subscriber must also not be blacklisted due to previous fraudulent activities.

The NTC commenced the commercial rollout of the Mobile Number Portability Act on 30 September 2021, under which qualified subscribers can switch networks for free while retaining their mobile numbers by submitting porting applications. In this regard, the country's three major mobile phone network providers have since implemented number portability and have formed a consortium to implement the law. The consortium appointed Syniverse, a US-based company, as their mobile number portability service provider.

The SIM Registration Act (Republic Act No. 11934) was signed into law in on 10 October 2022, mandating all SIM card users to registers their SIMs under their respective telcos. For such purpose, the law requires the disclosure of personal information and submission of a valid government-issued identification cards or other similar form of documents.

Law stated - 31 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

The NTC regulations state that a clear and unambiguous statement of the terms and conditions on which telecommunications service will be offered, including any discounts or special conditions that will be offered, must be contained in the tariff structure submitted to the NTC for approval. Terms pertaining to the rates, conditions of access and manner of opting in or out must be fully disclosed to subscribers.

Law stated - 31 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

There is currently no law, rule or regulation on net neutrality or zero-rating of data transmission in the Philippines. However, the Internet Consumer Protection and Net Neutrality bill currently pending in Congress would generally prohibit, among others, paid prioritisation (including data transmission zero-rating) and bandwidth throttling.

While there is no specific law or rule prohibiting bandwidth throttling, the Department of Justice has issued an advisory warning ISPs against using false, deceptive and misleading advertisements when marketing the maximum internet speed in the internet packages that they offer. They must also fully disclose their respective fair use policies and terms of use to give the end-users equal opportunities to access their services. Failure to comply with these directives is seen as a violation of the Consumer Act (Republic Act No. 7394) and will lead to the imposition of the appropriate penalties.

It is possible that bandwidth throttling may be considered a form of abuse of dominant position under the Philippine Competition Act (Republic Act No. 10667). This assumes that the entity engaged in it can be shown as having a dominant position in the relevant market. We are not aware of any ruling made by the Philippine Competition Commission (PCC) on the matter.

Law stated - 31 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

The Internet Transactions Act of 2023 (Republic Act No. 11967) was signed into law on 5 December 2023. The law establishes a comprehensive regulatory framework for business-to-business (B2B) and business-to-consumer (B2C) internet transactions.

Under the Internet Transactions Act, digital platforms engaged in e-commerce in the Philippines or purposely availing of the Philippine market must register with the Online Business Database of the E-Commerce Bureau. Further, they are required to comply with specific obligations listed under the law, including the disclosure of minimum information

for internet transactions, ensuring the quality of the goods received by the consumer, protection of data privacy, prohibiting the sale of regulated goods, and implementation of internal redress mechanisms.

Further, upon the establishment of the Online Business Database, all digital platforms, e-marketplaces, e-retailers, and online merchants engaged in e-commerce in the Philippines must register under the same.

The Implementing Rules of the Internet Transactions Act also establish the E-Commerce Code of Conduct that provides guidelines for persons engaged in e-commerce and sets out best practices.

As for enforcement matters, the law establishes the authority of the Department of Trade and Industry (DTI) to issue various orders in relation to the Internet Transactions Act. These include subpoenas to compel attendance or the production of documents, compliance orders to enforce conformity with the Act and related consumer protection laws, and takedown orders to remove prohibited or harmful online listings. Lastly, the DTI may also issue blacklist orders against non-compliant websites, platforms, or accounts to be published and shared with financial regulators and platforms.

The VAT on Digital Services Act (Republic Act No. 12023) was signed into law on 2 October 2024 and was implemented by BIR Revenue Regulation No. 3-2025. This amends the Tax Code by imposing 12 per cent VAT on digital services. Notably, digital services delivered by non-resident service providers are now also considered performed or rendered in the Philippines provided the services are consumed in the Philippines. Hence, non-resident digital service providers are also required to register with the Bureau of Internal Revenue (BIR), file returns, and remit VAT through the VAT on Digital Services (VDS) Portal if they render digital services to Philippine customers.

Law stated - 31 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

Philippine regulators have only recently regulated broadband services by imposing duties to disclose their service reliability to consumers and to observe the minimum service reliability standard of 80 per cent. They have not yet come up with circulars on standardisation and transition to next-generation access networks such as 5G.

Law stated - 31 May 2025

Data protection

12 Is there a specific data protection regime applicable to the communications sector?

The Philippines does not have a data protection regime that specifically applies only to the communications sector, although the NTC has issued regulations on retention periods on traffic data for voice and non-voice communications. The general law on the privacy of personal data, the Data Privacy Act (Republic Act No. 10173), applies to the communications sector.

Law stated - 31 May 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The Cybercrime Prevention Act of 2012 (CPA) (Republic Act No. 10175) protects the confidentiality and integrity of computer data and systems by declaring the following as cybercrimes:

- offences against the confidentiality, integrity and availability of computer data and systems (illegal access, illegal interception, data interference, system interference, misuse of devices and cybersquatting);
- computer-related offences (computer-related forgery, computer-related fraud and computer-related identity theft); and
- content-related offences (cybersex, child pornography and cyber libel).

The CPA appointed the National Bureau of Investigation and Philippine National Police (PNP) as enforcement authorities, and regulates their access to computer data, creating the Cybercrime Investigation and Coordinating Center as an inter-agency body for policy coordination and enforcement of the national cybersecurity plan, and an Office of Cybercrime within the Department of Justice for international mutual assistance and extradition.

The Implementing Rules and Regulations of the CPA provide that, under certain conditions, service providers are exempt from civil or criminal liability in respect of a computer data for which the service provider merely provides access if such liability arises from:

- the obligations and liabilities of users under a computer data; and
- the making, publication, dissemination or distribution of such computer data or any statement made in such computer data, including possible infringement of any right subsisting in or in relation to such computer data.

The Electronic Commerce Act of 2000 (ECA) (Republic Act No. 8792) penalises:

- hacking and piracy of protected material, electronic signature or copyrighted works;
- limits the liability of service providers that merely provide access; and
- prohibits persons who obtain access to any electronic key, document or information from sharing them.

The ECA also expressly allows parties to choose their type of level of electronic data security and suitable technological methods, subject to guidelines issued by the Department of Trade and Industry.

The Access Devices Regulation Act of 1998 (Republic Act No. 8484), as amended, penalises various acts of access device fraud such as using counterfeit access devices. An access device is:

- any card, plate, code, account number, electronic serial number and personal identification number;
- other telecommunications service, equipment or instrumental identifier;
- other means of account access that can be used to obtain money, goods, services or any other thing of value; or
- to initiate a transfer of funds (other than a transfer originated solely by paper instrument).

Banks, financing companies and other financial institutions issuing access devices must submit annual reports of access device frauds to the National Bureau of Investigation and the Anti-Cybercrime Group of the PNP.

Under the Data Privacy Act, personal information controllers shall establish the following technical security measures:

- a security policy with respect to the processing of personal data;
- safeguards to protect its computer network against accidental, unlawful or unauthorised usage, any interference that will affect data integrity or hinder the functioning or availability of the system, and unauthorised access through an electronic network;
- the ability to ensure and maintain the confidentiality, integrity, availability and resilience of their processing systems and services;
- regular monitoring for security breaches, and a process both for identifying and accessing reasonably foreseeable vulnerabilities in their computer networks, and for taking preventive, corrective, and mitigating action against security incidents that can lead to a personal data breach;
- the ability to restore the availability and access to personal data in a timely manner in the event of a physical or technical incident;
- a process for regularly testing, assessing, and evaluating the effectiveness of security measures; and
- encryption of personal data during storage and while in transit, authentication processes and other technical security measures that control and limit access. The National Privacy Commission recommends Advanced Encryption Standard with a key size of 256 bits (AES-256) as the most appropriate encryption standard. Passwords or passphrases used to access personal data should be of sufficient strength to deter password attacks. A password policy should be issued and enforced through a system-management tool.

The DICT has also issued Memorandum Circular No. 2017-005, which provides for the policies, rules and regulations on the protection of critical infostructure (CII). It provides for minimum standards on incident reporting, creation of computer emergency response teams (CERTs), risk management, and audit processes to mitigate the risk of cyber threats. It also mandates government agencies to adopt the Code of Practice as stipulated in PNS ISO/IEC 27002.

Law stated - 31 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

The Philippines currently has no specific legislation regarding big data. However, funds were appropriated under the Bayanihan to Recover as One Act (Republic Act No. 11494) for the establishment of a computational research laboratory at the University of the Philippines-Diliman Institute of Mathematics. This has since resulted in the creation of the Computation Science Research Center (CSRC) within the UP Diliman College of Science, which conducts big data analytics for covid-19 and other pandemic-related research.

Senate Bill No. 688 was previously filed in the 17th Congress to establish a big data centre for research purposes. However, as at the time writing, the bill has yet to be refiled or enacted into law.

Law stated - 31 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

The DICT has issued Department Circular No. 2017-002, which prescribes a Cloud First Policy that provides for data residency for certain classes of government data. It provides that generally, no residency restrictions shall be placed on government data stored or processed in the cloud, provided that appropriate controls and security measures are present. However, the storage or processing of sensitive, above-sensitive, and highly sensitive government data in the cloud are subject to data residency rules.

In respect of customer records under the Anti-Money Laundering Council's (AMLC) 2018 Guidelines on Digitation of Customer Records, digitised customer records must be stored in the covered person's central database, which should be maintained in the head office or the main branch of foreign banks operating in the Philippines.

However, the guidelines do not prohibit covered persons from having more than one database. Information provided by the AMLC confirms that data could be located other than in the head office or main branches of foreign banks operating in the Philippines.

Law stated - 31 May 2025

Key trends and expected changes

16 | Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

Investments in telecommunications are subject to safeguard measures, including the power of the President to suspend or prohibit any proposed merger, acquisition, transaction or investment in a public service if all the following conditions are met, namely:

- the transaction results in a grant of direct or indirect control to a foreigner or foreign corporation;
- the suspension or prohibition is necessary for the interest of national security; and,
- the suspension or prohibition is recommended by the relevant administrative agency.

The suspension or prohibition must be effected within 60 days from such recommendation.

In addition, there is pending legislation in Congress that seeks to regulate internet transactions. Generally, this proposal aims to impose registration requirements on online merchants, as well as to adopt a code of conduct applicable to all online merchants. This proposal also outlines their obligations and corresponding liabilities.

There is also a pending Net Neutrality bill in Congress that would generally prohibit paid prioritisation (including data transmission zero-rating) and bandwidth throttling.

Law stated - 31 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

There is no general law that applies to the media sector as a whole. Nevertheless, the laws and regulations in place typically focus on regulating access to content, such as age-gating concerning movies, age advisories for television shows, and ownership restrictions and consumer protection. In addition, the media sector is affected by legislation on press freedom, intellectual property, privacy, criminal law and general civil law.

Various government agencies handle content regulation, such as the Movie and Television Review and Classification Board, the Optical Media Board and the National Council for Children's Television.

Law stated - 31 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Only Philippine nationals or corporations, partnerships or associations wholly owned by Philippine nationals may engage in broadcasting.

There are no regulations concerning the cross-ownership of media. However, an entity cannot engage in both telecommunications and broadcasting under a single franchise.

Law stated - 31 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

A broadcasting company would need to be a corporation established in the Philippines with a franchise granted by the Philippine Congress. This franchise is in the form of a law and therefore its grant goes through the same process as other types of statutes. The typical term of a Congressional franchise is 25 years and is renewable upon application.

An enfranchised broadcasting company would have to also obtain certain principal licences from the National Telecommunications Commission (NTC). These are:

- the Certificate of Public Convenience and Necessity (CPCN). The application process is quasi-judicial, where an applicant files a petition for the CPCN issuance, and must prove its legal, technical and financial capability, as well as the feasibility of offering the contemplated service. The particular parameters and specific requirements utilised by the NTC to assess an application will depend on the service being proposed. Parties, such as entities engaged in the same service, may participate in the proceeding to oppose the application. Typically, it takes up to 10 years for the NTC to act on the petition. CPCNs usually have a term of 10 years and are renewable upon application. They are non-exclusive and may be amended. A nationwide application for a CPCN has a filing fee of 330,981 Philippine pesos.
- a provisional authority (PA). A PA is an authority to operate issued to a CPCN applicant once it successfully proves that it has the financial and technical capacity to deliver its services to the public. The PA is issued pending the full assessment of the application for, and issuance of, the CPCN. The holder of a PA can already operate the service even if the CPCN petition is still pending. A PA's term is 18 months and is renewable upon application.
- frequency allocation. This is typically applied for and allocated after the issuance of the PA or CPCN. An application is made using the NTC-prescribed form, supported by technical specifications of the broadcast network and of the equipment to be used. The frequencies shall then be allocated upon verification that they are

available or are properly allocated within the National Radio Frequency Allocation Table and that the applicant can properly utilise them. Frequency bands assigned are subject to an annual spectrum user fee, depending on the frequency band, channel and coverage applied for.

Law stated - 31 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

There are no rules requiring television broadcasters to include a minimum amount of local content in their programming. However, the Broadcast Code of the Philippines (which was formulated by the local organisation of broadcasters and adopted by the NTC) provides that the airing of programmes in a foreign language other than English must take into account the broader interests of the public in the scheduling and presentation of the programmes. Also, stations broadcasting such programmes are mandated to keep a record of the broadcasts for not less than six months. In respect of radio programming, the NTC requires all radio stations to broadcast a minimum of four original Philippine musical compositions every hour. Moreover, rules issued by the Film Development Council of the Philippines prohibit restrictions on the maximum number of Filipino films exhibited to screen in cinemas at any given week. They also require that an equitable ratio between Filipino films and foreign films be observed in applicable scenarios every playdate except in cases where a National Film Festival is held in support of the local film industry. There are no similar regulations for online or other media.

Law stated - 31 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Only Philippine nationals or corporations, where at least 70 per cent of the capital stock is owned by Philippine nationals, may engage in advertising, including online advertising, directed at the Philippine market or using Philippine mass media. Advertising companies need not obtain a special licence or register with any regulatory body specifically supervising the advertising industry, and there is no such governmental body. Instead, local companies and other participants in the industry have formed an organisation called the Ad Standards Council (ASC). It is essentially a self-regulating body.

Advertising content is principally regulated by the provisions of the Broadcast Code of the Philippines and the Consumer Act, as well as various special laws and regulations, such as regulations issued on tobacco advertisements and those issued by the Philippine Food and Drug Administration. The ASC has also issued a Code of Ethics and is guided by its

Manual of Procedures. These seek to regulate both advertising content and the behaviour of participants in the advertising industry.

Law stated - 31 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Local rules require a cable television system operating in a community that is within particular field intensity contours of an authorised television broadcast station or stations to carry the television signals of these stations. A cable television system operating in a community may carry or, upon request by a relevant station licensee or permittee, shall carry the television broadcast signals from certain broadcast stations such as non-commercial educational television stations. The cable company's retransmission of broadcast signals without charge does not infringe the intellectual property rights of the broadcasting station. In addition to the signals that such cable television system is required to carry, an access channel should be provided for the use of certain entities (eg, the national government and socio-civic organisations) for free, as a public service feature of the television cable system.

Law stated - 31 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

Except for special laws against content-related offences online under the Cybercrime Prevention Act, the Anti-Child Pornography Act (Republic Act No. 9775) and the Safe Spaces Act (Republic Act No. 11313), there are no general regulations expressly governing new media content, so that to the extent that the new media operator is based in the Philippines and providing a service here, local authorities will likely try to apply media laws in general.

There are existing regulations on the aspect of the transmission of new media. Generally, entities engaged in the delivery of content, information, applications, programmes and emails online may be considered value-added service (VAS) providers. VAS providers may be 100 per cent foreign-owned. VAS providers do not need to obtain a congressional franchise or a CPCN but must register with the NTC.

Further, certain media services, including over-the-top (OTT) platforms and other digital content providers, are now subject to VAT under the VAT on Digital Services Act (Republic Act No. 12023) and Revenue Regulation No. 3-2025. These issuances amend the Tax Code and state that non-resident digital service providers catering to Philippine consumers are

required to register with the Bureau of Internal Revenue (BIR) and collect VAT on the sale of digital services, regardless of their physical presence in the country.

Law stated - 31 May 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The NTC was initially set to switch from analogue to digital television by 11.59pm on 31 December 2015 and chose the integrated services digital broadcast-terrestrial standard as the sole standard in the delivery of digital terrestrial television services in the country. However, this did not happen, and the NTC announced that preparations for the analogue shutdown are underway, with the expectation of completing the transition by the end of 2025 or 2026.

Law stated - 31 May 2025

Digital formats

25 Does regulation restrict how broadcasters can use their spectrum?

No. Regulations allow multiplexing and broadcast of high-definition feeds. However, an early warning broadcast system is a required feature in the Philippine digital terrestrial television system. In general, broadcasters would need to use the spectrum only for the services covered by their franchise and licences.

Law stated - 31 May 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

Media plurality per se has not been the subject matter of regulatory efforts in the country. Concepts such as diversity and representation are only beginning to enter the mainstream of public discussion. However, owing to the proliferation of fake news and its consequences in Philippine electoral politics, there have been attempts to pass bills regulating social media and penalising fake news.

Law stated - 31 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

The Securities and Exchange Commission has recently been active in policing compliance with nationality restrictions of new media platforms operating within or offering their products and services to the Philippine market. It has, for example, issued guidelines for an online or mobile app platform operator (which renders service to third-party clients) not to be deemed as engaging in mass media activities, namely:

- there is no pervasive or indiscriminate display to the general public of any promotional materials or advertisements on the products or services being offered by the third-party clients or even the platform or mobile app itself;
- only the following information may be made available in the app, website or platform:
- enumeration of the services offered by the platform itself;
- instruction on how to use the said platform;
- enumeration of a third-party partner, and this shall only be limited to the listing of the name or logo of the third-party client; and
- any other information on the platform required to be disclosed by any law or regulatory measures; and
- the disclosure of the products and services offered by its third-party clients is only for the purpose of completing the transaction enabled by the app, website or platform.

There is also a trend towards recognising social media as mass media. In Commission on Elections (COMELEC) Resolution No. 11064, the restrictions on social media use for campaign purposes was further expanded to include rules on content, conduct, and disclosures on social media campaigns. Its provisions state, among others, that candidates and political parties are required to register official accounts, disclose paid advertisements, and refrain from coordinated inauthentic behaviour. It also contains transparency and disclosure requirements on the use of artificial intelligence (AI) technology in election propaganda and campaign materials. Hence, it requires disclosures when AI-generated content is utilised and prohibits the use of deepfakes or other forms of manipulated media intended to mislead voters.

Law stated - 31 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The National Telecommunications Commission (NTC) is the government body that principally regulates the telecommunications and broadcasting industries. The Department of Information and Communications Technology, Department of Trade and Industry and the National Privacy Commission are mandated to issue relevant regulations to communications services providers.

Content provision, however, is mainly regulated by the Movie and Television Review and Classification Board and the Optical Media Board. The National Council for Children's Television issues special regulations. Local broadcasters have formed a self-regulatory body called the Association of Philippine Broadcasters, which has issued certain programme standards for television and radio.

The Philippine Competition Commission (PCC) is the main antitrust regulator tasked with curbing anticompetitive agreements, abuse of dominant position, and anticompetitive mergers. However, the NTC has the power to exempt any specific telecommunications service from its rate or tariff regulations if the service has sufficient competition to ensure fair and reasonable rates or tariffs. The NTC nevertheless retains its residual powers to regulate rates or tariffs when ruinous competition results, or when a monopoly or a cartel or combination in restraint of free competition exists.

Law stated - 31 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

Decisions of the NTC issued in the exercise of its quasi-judicial powers may be brought to the Court of Appeals for review either through a petition for review or a petition for certiorari. The former may be taken based on questions of law, facts or mixed questions of law and facts, while the latter may be taken based on a claim of grave abuse of discretion on the part of the regulator whose decision is being challenged. Both are taken by filing verified petitions, with proof of service of a copy on the adverse party and on the regulator whose decision is challenged, and payment of docket and other fees.

Law stated - 31 May 2025

Competition law developments

30 | Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

The PCC is finalising a draft memorandum circular to be jointly issued with other regulatory agencies involved in property development and information and communications technology, which will prohibit property developers from entering into exclusivity arrangements with internet service providers, public telecommunications entities and cable television service providers.

The PCC is also seeking to be included in the NTC's process of allocating and reallocating vacated or available frequencies. Towards this end, the PCC is recommending amendments to NTC's rules so that the PCC would become a member of the approving body for frequency assignment and reassignment. This move was prompted by the NTC's reallocation of frequencies formerly utilised by broadcasting company ABS-CBN to Advanced Media Broadcasting System, Aliw Broadcasting Corporation and Swara Sug Media Corporation.

On 21 August 2023, the PCC issued the Guidelines on the Motu Proprio Review of Mergers and Acquisitions in Digital Markets, which provides for a non-exhaustive list of indicators of potential competition issues that may arise from a merger or acquisition in the digital market, and thus serves as the basis for the PCC to initiate a *motu proprio* review even if the transaction falls below the mandatory notification thresholds.

In May 2024, the PCC held a strategic policy dialogue with the NTC to discuss NTC Memorandum Order No. 004-06-2022, which regulates block timing practices in free TV.

In January 2024, the PCC released its Market Study on Digital Platforms and Online Advertising, which identifies key competition concerns, which include: (1) the self-preferencing practices of vertically integrated platforms that operate both supply-side and demand-side, (2) data-related barriers to entry stemming from large platforms' ability to aggregate consumer data across multiple services, and (3) the opacity of the programmatic advertising supply chain posing challenges for advertisers and publishers. Among others, it recommends greater transparency requirements, data portability, and a code of conduct for digital platforms to address these competition concerns.

Law stated - 31 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Regulatory framework

The Info-communications Media Development Authority (IMDA) is the converged regulator for the info-communications and media sectors and is responsible for the development, promotion and regulation of the info-communications industry, which includes both the telecoms and IT sectors. The IMDA rests under the direct authority of the Ministry of Communications and Information.

At present, the telecoms and media sectors are governed by separate regulatory frameworks.

The telecoms sector is regulated by the IMDA under the Telecommunications Act 1999 (the Telecoms Act) and the Info-communications Media Development Authority Act 2016 (the IMDA Act).

'Telecommunications' is defined very broadly under the Telecoms Act as:

> [A] transmission, emission or reception of signs, signals, writing, images, sounds or intelligence of any nature by wire, radio, optical or other electromagnetic systems whether or not such signs, signals, writing, images, sounds or intelligence have been subjected to a re-arrangement, computation or other processes by any means in the course of their transmission, emission or reception.

The Telecoms Act is the primary legislation governing the telecoms industry in Singapore. It sets out the broad licensing and regulatory framework for the telecoms sector. Specific issues are dealt with through regulations, codes of practice, standards of performance, directions and advisory guidelines issued by the IMDA, pursuant to its powers under the Telecoms Act.

The Telecoms Act itself does not make a distinction between fixed, mobile and satellite services. This is consistent with the technology-neutral approach that the IMDA has taken in regulating the industry. There are, however, licensing and regulatory requirements that are service-specific. For instance, the Telecommunications (Radio-Communication) Regulations (the Radio-Communication Regulations) regulate the licensing process for radio frequency (RF) spectrum, the use of RF spectrum and the operation of radio stations and networks. This set of regulations applies primarily to mobile services.

Other regulations cover specific issues pertaining to fixed, mobile and satellite services. Examples of such regulations are the Telecommunications (Class Licence) Regulations and the Telecommunications (Dealers) Regulations. The IMDA has also replaced the Code of Practice for Competition in the Provision of Telecommunication Services 2012 (TCC)

with the Code of Practice for Competition in the Provision of Telecommunication and Media Services 2022 (Converged Code), a converged competition code to govern competition and market-related matters in the telecoms and media markets.

At present, the Telecoms Act does not apply to the licensing of any broadcasting service or any broadcasting apparatus that is already subject to regulation under the Broadcasting Act 1994 (the Broadcasting Act).

Foreign ownership restrictions

Since 1 April 2000, no direct or indirect foreign equity limits have applied to telecoms licensees. However, other than in exceptional circumstances, the IMDA's current practice is to issue facilities-based telecoms licences only to companies incorporated in Singapore, which can be wholly owned by a foreign entity. In the case of services-based licences, the IMDA would also issue licences to companies incorporated in Singapore (which can be wholly owned by a foreign entity) or to foreign companies with a locally registered branch. Controls on ownership on telecoms licensees exist under the Telecoms Act, the Broadcasting Act and the Converged Code.

Law stated - 19 May 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

Licensing framework

All persons operating and providing telecoms systems and services in Singapore must be licensed under section 5 of the Telecoms Act. The IMDA categorises licences for the operation and provision of telecoms systems and services into licences for either facilities-based operators (FBOs) or services-based operators (SBOs), and where RF spectrum is required for the provision of wireless services, additional licensing is required under the Radio-Communication Regulations.

FBO licence

A person deploying and (or) operating of any form of telecommunication network, systems and (or) facilities to provide telecommunication and (or) broadcasting services outside of his or her own property boundaries to third parties, who may include other licensed telecommunication operators, business customers or the general public will require an FBO licence. The IMDA generally adopts a technology-neutral approach towards the licensing of telecoms infrastructure. The configuration of the systems deployed and the technology platform (wireless or wired) adopted will be left to the choice of the licensee, subject to spectrum and other physical constraints. An FBO licence is on a higher hierarchical level than an SBO licence.

As such, an FBO licensee does not need an SBO licence if it wishes to provide services that on its own would have required an SBO licence, provided that the FBO licensee has already been licensed to provide the service. The converse, however, does not apply. An SBO licensee that wishes to deploy telecoms infrastructure in the provision of telecoms services must apply for an FBO licence. The FBO licence will then replace the SBO licence.

Although the general conditions of an FBO licence are standardised across all FBO licensees, additional specific conditions may apply to each individual FBO licensee depending on the services that the licensee may provide.

The following is a non-exhaustive list of telecoms systems and services that may require an FBO licence:

- any terrestrial telecoms infrastructure for the carriage of telecoms or broadcasting traffic (be it cross-border or local traffic; network coverage may be nationwide or limited to selected local geographic broadcast), including but not limited to:
    - submarine cables (including the establishment of frontier stations, backhaul and sale of indefeasible rights of use);
    - satellite international gateways; and
    - domestic telecoms networks (including core backbone and local access networks);
- public switched telephone services;
- public switched integrated services digital network services;
- leased circuit services;
- public radio communication services;
- public cellular mobile telephone services;
- public trunked radio services;
- public mobile data services;
- terrestrial telecommunication network for broadcasting purposes only; and
- satellite uplink or downlink for broadcasting purposes.

FBO licences	**Annual fees and duration**
FBOs	Licence duration: 15 years, renewable for a further period as the IMDA thinks fit. Annual fee: • first S$50 million in annual gross turnover (AGTO): S$80,000; • next S$50 million to S$100 million in AGTO: 0.8 per cent of incremental AGTO; and • above S$100 million in AGTO: 1 per cent of incremental AGTO.

FBO designated as public telecoms licensee	Licence duration: 20 years, renewable for a further period as the IMDA thinks fit. Annual fee: • first S$50 million in AGTO: S$200,000; • next S$50 million to S$100 million in AGTO: 0.8 per cent of incremental AGTO; and • above S$100 million in AGTO: 1 per cent of incremental AGTO.
Public mobile data services Public trunked radio services	Licence duration: 10 years, renewable for a further period as the IMDA thinks fit. Annual fee: • first S$50 million in annual gross turnover (AGTO): S$80,000; • next S$50 million to S$100 million in AGTO: 0.8 per cent of incremental AGTO; and • above S$100 million in AGTO: 1 per cent of incremental AGTO.
Terrestrial telecoms network for broadcasting purposes only Satellite uplink/downlink for broadcasting purposes	Licence duration: 10 years, renewable on a five - yearly basis. Annual fee: S$5,000

SBO licence

SBO licences are granted to operators or providers that do not intend to deploy telecoms infrastructure. Such licensees may instead lease telecoms network elements (eg, transmission capacity and switching services) from FBO licensees to provide telecoms services or resell the telecoms services of other telecoms licensees. SBO services can be individually licensed or class-licensed. Class licensing is a licensing scheme where the standard terms and conditions that apply to the category of licences are publicly published. Licensees providing or operating the services within the scope of the class licence will be deemed to have read and agreed to the terms and conditions of the class licence. Generally, providers leasing international transmission capacity to provide telecoms services will be licensed individually.

Telecoms services that require SBO (individual) licensing include, without limitation:

- international simple resale;
- resale of local leased fixed-line connectivity services;
- public internet access services;
- internet exchange services;
- virtual private network services;
- managed data network services;
- mobile virtual network operation;
- live audiotex services;
- internet protocol (IP) telephony services;
- satellite mobile telephone or data services;
- mobile communications on aircraft;
- voice and data services with masking of calling line identity;
- machine-to-machine services;
- white space geolocation database services; and
- prepaid services for other telecoms services, such as:
    - call-back and call re-origination services;
    - internet-based voice and data services;
    - international calling card (ICC) services;
    - resale of public switched telecoms services;
    - store-and-retrieve value-added network services; and
    - store-and-forward value-added network services.

Telecoms services that require an SBO (class) licence include, without limitation:

- call-back and call re-origination services;
- internet-based voice and data services;
- ICC services;
- resale of public switched telecoms services;
- store-and-retrieve value-added network services;
- store-and-forward value-added network services;
- audiotex services; and
- public chain payphone services.

The provision of certain services, such as audiotex and internet access services, are subject to concurrent telecoms and media licensing requirements. In this respect, audiotex and internet access services are also deemed to be class-licensed under the Broadcasting (Class Licence) Notification.

SBO (individual) licence

SBO (individual)	Annual fee: • first S$50 million in AGTO: S$4,000; • next S$50 million to S$100 million in AGTO: 0.5 per cent of incremental AGTO; and • above S$100 million in AGTO: 0.8 per cent of incremental AGTO.
Live audiotex services only	S$200 every five years
SBO (class) licence	
Resale of public switched telecommunication services, public chain payphone services, and store - and - retrieve value - added network services (without the use of leased circuits)	No registration fee
All other categories of SBO (class) licences	S$200 (one - time payment)

Licensing – radio frequency

Pursuant to its exclusive privilege under the Telecoms Act, the IMDA can determine how the RF spectrum is allocated. The IMDA can also make decisions on the assignment of unused radio spectrum. Specifically, the Radio-Communication Regulations give the IMDA the right to prepare and publish radio spectrum plans and RF band plans. The Radio Spectrum Master Plan is a document prepared by the IMDA pursuant to such statutory right and it serves to inform the industry and interested parties on the allocation and availability of spectrum, technological trends in the use of spectrum and the IMDA's policy concerning spectrum allocation and reallocation for public communication networks. At the time of writing, the Radio Spectrum Master Plan is in the process of being updated by the IMDA, and the updated version has yet to be published. The IMDA has also published the Spectrum Management Handbook to provide information on spectrum allocations, assignment criteria and application procedures for various radio-communication services. The IMDA is also empowered under the Radio-Communication Regulations to vary or revoke any radio spectrum plan or RF band plan, in whole or in part.

RFs required for the provision of 2G, 3G and 4G mobile services, as well as wireless broadband services, have been granted as spectrum rights through an auction process. RFs required for the operation of a satellite are generally allocated administratively or assigned by the IMDA as part of the satellite licence. The Radio-Communication

Regulations also regulate the installation and maintenance of radio communications stations or networks in Singapore.

Regarding the permitted use of licensed radio spectrum, the general powers of the Telecoms Act and the Radio-Communication Regulations give the IMDA the discretion to direct the grantee concerning its use of the spectrum right. Additionally, the grantee may be restricted in its use of equipment within the allocated RF spectrum. For example, no station fitted in an aircraft shall be operated or used while such aircraft is at rest on land or water in Singapore, barring certain exceptional circumstances as stated in Regulation 36 of the Radio-Communication Regulations.

Provision of publicly available telephone services

Subject to the IMDA's licensing requirements, any person may apply to the IMDA for a licence to provide telecoms services to the public. There are no special conditions imposed by the IMDA for such services. A holder of an FBO licence may, however, depending on the scope and requirements of its operations, apply to the IMDA to be designated as a public telecommunication licensee (PTL) under section 8 of the Telecoms Act. A PTL is accorded certain statutory powers under the Telecoms Act to facilitate the deployment of telecoms infrastructure, including the power to enter state and private property to lay telecoms infrastructure. The IMDA will grant such applications only if the FBO licensee has committed to substantial telecoms infrastructure investment and roll-out to offer services to a significant proportion of the population within a reasonable time. At present, three licensees have been designated as PTLs (namely, NetLink Management Pte Ltd (as trustee-manager of NetLink Trust), Singapore Telecommunications Limited and Starhub Ltd). The IMDA also reserves the right to impose basic service obligations on a PTL.

The IMDA may modify the conditions of a telecoms licence granted under section 5 of the Telecoms Act. The procedure to be followed is set out in section 9 of the Telecoms Act, which prescribes that, in the case of a PTL, the IMDA first has to give notice to the PTL of the proposed modifications to the licence, including whether compensation is payable. Before finalising any direction to implement the licence modifications, the IMDA is also required to give PTLs at least 28 days to make a written representation of the proposed modifications. In the case of a licensee that is not a PTL, the Telecoms Act does not set out the procedure to be followed concerning the modification of the licence. Instead, the modification procedure of a non-PTL licence is typically set out in the relevant licence. Under the terms of their licences, telecoms licence holders may not assign, transfer, deal with or otherwise dispose of the whole or any part of the rights, privileges, duties or obligations under the licence without obtaining the prior written approval of the IMDA.

Provision of public Wi-Fi services

Operators providing public Wi-Fi services may require a telecom licence granted by the IMDA, as well as a broadcasting class licence. However, commercial establishments that are open to the public and that merely provide Wi-Fi to customers within their own premises for purposes incidental to their primary business may be exempted from telecom licensing requirements.

In 2006, the Singapore government launched the Wireless@SG programme, in partnership with private-sector operators, to deploy wireless hotspots in public areas in Singapore to provide high-speed wireless broadband. The Wireless@SG programme aims to promote a wireless broadband lifestyle among citizens. At present, the four licensed Wireless@SG operators are Singtel, StarHub, M1 and SIMBA. Businesses, venue owners or tenants wishing to provide free Wi-Fi to their premises may enter into commercial agreements with the Wireless@SG operators for this purpose.

Law stated - 19 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

The IMDA manages the allocation and usage of spectrum for various services, including public mobile, private land mobile, terrestrial fixed and broadcasting services. As such, spectrum licences generally specify that licensees can only use the assigned spectrum for the specified purpose. Conditions requiring the network to be operated on a non-interference and unprotected basis, and limiting the operation to specific geographical locations, may also be imposed.

The IMDA may also permit the existing assigned spectrum to be used for new purposes if there are grounds to do so. For example, in August 2020, the IMDA allowed mobile network operators to ride on existing 4G networks to deploy 5G non-standalone networks as part of trials to allow consumers to enjoy partial 5G experiences in the short term, with faster mobile speeds on 5G-enabled devices as a key feature.

Licensed RF granted under a spectrum right may be traded and shared, subject to the IMDA's prior approval and any restrictions and conditions specified by the IMDA. At present, the IMDA has not issued any specific regulations on the trading and sharing of RF, aside from general conditions stated in the Radio-Communication Regulations. Conditions on trading and sharing of RF may also be imposed via the licences or relevant spectrum rights.

Law stated - 19 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Ex-ante regulations are primarily applied to licensees that are classified as 'dominant licensees' under the Converged Code. Under section 2.3 of the Converged Code, a licensee will be classified as 'dominant' if it is licensed to operate facilities that are sufficiently costly or difficult to replicate such that requiring new entrants to do so would create a significant barrier to rapid and successful entry into the telecommunication and (or) media market in Singapore by an efficient competitor; or if it has the ability to exercise

significant market power in any market in Singapore in which it provides telecommunication or broadcasting services.

In this regard, dominant licensees are subject to a range of ex-ante obligations under the Converged Code, such as:

- accounting separation requirements;
- obligations to file tariffs with the IMDA for approval;
- to provide unbundled services; and
- to allow resale of end-user services by any licensee.

Dominant licensees may also be required to offer certain interconnection and access-related services on terms that are pre-approved by the IMDA, by way of a standardised reference interconnection offer (RIO).

Tariffing

Unless exempted by the IMDA, dominant licensees must file tariffs for any telecommunications service they intend to offer (including any offer on a trial basis) with the IMDA and obtain the IMDA's prior approval before offering the service. The proposed tariff filing must include, among others:

- certain specified information, including a description of the service;
- the relevant prices, terms and conditions;
- any discounts or special considerations that will be offered; and
- the minimum period for which the service will be available.

The IMDA will assess whether the proposed tariff is just and reasonable in accordance with the criteria under section 4.4.5.2 of the Converged Code.

Interconnection with dominant licensees

If required by the IMDA, dominant licensees must also publish RIOs, under which they have to offer interconnection and access-related services on prices, terms and conditions that are pre-approved by the IMDA. A downstream operator that meets the relevant criteria may then request services from the dominant licensee under the terms of its RIO.

Presently, Singtel (which is the incumbent fixed-line network operator and also operates several telecoms facilities such as submarine cable landing stations) and NetLink Trust (whose assets include central offices, ducts and manholes) have been required to offer RIOs pursuant to the Converged Code.

In the context of the next-generation nationwide broadband network (NGNBN), the IMDA has also imposed similar obligations on the appointed network and operating companies to make available certain mandated services to qualifying persons under the terms of standardised interconnection offers (ICOs).

Accounting separation

Dominant licensees are subject to the IMDA's Accounting Separation Guidelines, which provide for two levels of accounting separation: detailed segment reporting and simplified segment reporting. The accounting separation requirements are intended to provide the IMDA with information to monitor cross-subsidisation by dominant FBO licensees, as well as to ensure that services provided internally by dominant FBO licensees to their downstream operators or affiliates are provided on similar terms to equivalent services provided to other unrelated licensees.

Briefly, detailed segment reporting involves separate reporting of key service segments and certain individual retail services. The requirements include a specified cost allocation process and prescribed allocation methodologies for certain cost and revenue items. Reports include both income statements and mean capital employed statements. In contrast, simplified segment reporting requires less disaggregation of operations and a less rigorous cost allocation process. Only income statement reporting is required.

Next-generation nationwide broadband network

To ensure effective open access to the NGNBN infrastructure for downstream operators, the IMDA has put in place structural separation and operational separation requirements on the network and operating companies.

Merger control

Under Part 5A of the Telecoms Act, all designated telecommunication licensees (DTLs), designated business trusts (DBTs) and designated trusts (DTs) are required to comply with merger control requirements. Where a transaction meets the specified pre-merger filing thresholds, generally, where the transaction would result in a party and its associates becoming either a 12 per cent controller (namely, holding 12 per cent or more) or a 30 per cent controller (namely, holding 30 per cent or more) of the ownership or voting power in a DTL, DBT or DT, the IMDA's prior approval must be sought for the transaction. Also, the IMDA must be notified if a transaction would result in a person holding 5 per cent or more but less than 12 per cent of the ownership or voting power in a DTL, DBT or DT.

Infrastructure sharing

Under certain circumstances, the IMDA may require an FBO licensee (which may not be a dominant licensee) to 'share' its infrastructure with other licensees. As provided under the Converged Code, the IMDA may require sharing of any infrastructure that it determines is 'critical support infrastructure' or 'essential resource', or where the IMDA concludes that sharing would be in the public interest, in accordance with the principles in the Converged Code.

Law stated - 19 May 2025

Structural or functional separation

> Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

Generally, the IMDA does not require structural or functional separation between an operator's network and service activities in Singapore. However, concerning the NGNBN, the IMDA has, with a view to ensuring effective open access for downstream operators, instituted a multi-layered industry structure consisting of:

- the network company (NetCo);
- several operating companies (OpCos) including the appointed OpCo; and
- numerous retail service providers.

In this regard, the IMDA issued the Guidelines for Service Provisioning over the NGNBN to provide guidance on the responsibilities of operators in each layer in the provisioning and day-to-day operations of Next Gen NBN services, so that the different layers can interact in a coordinated manner to provide Next Gen NBN services to end-users.

At the first layer, the NetCo appointed by the IMDA is responsible for building and operating the passive infrastructure, which includes the dark fibre network. OpenNet Pte Ltd was the initial NetCo appointed by the IMDA. The assets and operations of OpenNet have since been taken over by NetLink Trust (acting through its trustee, NetLink Management Pte Ltd), following NetLink Trust's acquisition of OpenNet effective from 1 October 2014. In July 2017, 100 per cent of the units in NetLink Trust were acquired by NetLink NBN Trust (acting through its trustee-manager, NetLink NBN Management Pte Ltd). Under the conditions of the FBO licence held jointly by NetLink NBN Management Pte Ltd (as trustee-manager of NetLink NBN Trust) and NetLink Management Pte Ltd (as trustee of NetLink Trust), the NetCo is required to ensure structural separation, which involves, among other things, ensuring that:

- it has no effective control over any other telecoms licensee or broadcasting licensee;
- it is not under the effective control of any other telecoms licensee or broadcasting licensee, whether acting alone or in concert with its associates; and
- it is not under the effective control of the same controlling entity as any other telecoms licensee or broadcasting licensee (the 'no effective control' requirements).

These requirements are intended to ensure that the NetCo and its downstream operators are separate entities with fully autonomous decision-making considerations and that they do not have control over each other's management and major operating decisions.

At the second layer, Nucleus Connect Pte Ltd (Nucleus Connect), the appointed OpCo, is responsible for building and operating the active infrastructure, comprising switches and transmission equipment, to provide wholesale network services. While Nucleus Connect may be owned by its downstream operating units, it is nevertheless subject to a range of detailed operational separation requirements under its FBO licence conditions. The operational separation requirements are intended to ensure, among other things, that:

- downstream operators are treated in a non-discriminatory manner;
-

Nucleus Connect independently formulates and makes its own commercial decisions; and

- it operates at arm's length from affiliated operators.

Section 92 of the Telecoms Act also empowers the Minister for Digital Development and Information (the Minister), if certain conditions are met and in the public interest, to issue a separation order requiring the transfer of a telecom licensee's business or assets to a separate or independent entity.

Law stated - 19 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

Generally, universal service obligations (USOs) are applied by the IMDA only to PTLs pursuant to the conditions of their licence. For example, Singtel, the incumbent telecoms operator, is required under its licence to provide basic telephone services to any person in Singapore who requests such service. In respect of the NGNBN, which is intended to deliver high-speed broadband access throughout Singapore, the IMDA has imposed USOs on both the appointed NetCo and OpCo following the creation of the NGNBN. The NetCo's USO took effect on 1 January 2013. The NetCo's USO obliges it to fulfil all requests to provide its fibre services to all locations in Singapore. Correspondingly, the OpCo must meet all reasonable requests by any operating company or downstream retail service providers for access to a basic set of wholesale services offered under its standard ICO.

Compliance with USOs is not financed by a statutorily created fund (eg, universal service funds in other jurisdictions) or contributions from industry.

Law stated - 19 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

The IMDA administers the number allocation scheme in Singapore under its National Numbering Plan. Among other things, the National Numbering Plan sets out rules and guidelines for the use and assignment of numbers to telecommunication services delivered over the public switched telephone network (PSTN), the radio network, user-centric data only (UCDO) and the internet or other IP-based networks; and describes the assignment of numbers to international services, trunk service, emergency services and special services such as voice mail and intelligent network (IN) services. There is only one numbering area in Singapore and area or trunk codes are not used. The PSTN, radio network, UCDO and IP telephony share the same numbering plan – a uniform eight-digit numbering plan.

Numbers are allocated to various service categories according to the first digit:

- '0' for international services;
- '1' for special services, including calls for operator assistance, service enquiry, machine-to-machine, internet dial-up, voice information, IN services and access code international direct dial type of services;
- '3' for IP telephony and UCDO services;
- '6' for PSTN and IP telephony services;
- '8' and '9' for eight-digit radio network numbers; and
- '99' for three-digit emergency services.

Number portability across mobile networks and fixed-line services is obligatory. Fixed-line and mobile telephony operators are required to allow consumers to retain full use of their existing phone numbers when switching service providers. Also, IP telephony operators utilising series '6' numbers (namely, Singapore telephone numbers beginning with '6') are subject to the same number portability requirements as fixed-line operators. Syniverse Technologies is the centralised database administrator appointed to operate the centralised number portability database system, starting with the launch of full mobile number portability in June 2008. The IMDA has published a document titled the Fixed Number Portability Guidelines to set out the technical approach to fixed number portability by FBO licensees offering a fixed-line voice service.

Law stated - 19 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Retail tariffs filed by dominant licensees for approval with the IMDA must include information relating to the customer's terms and conditions.

The Converged Code also sets out several consumer protection-related provisions with which all FBO licensees and SBO licensees must comply. These include provisions relating to:

- minimum quality of service standards (and disclosure to end-users of any lower standards agreed to);
- disclosure of prices, terms and conditions (including for services provided on a free trial basis);
- restrictions on service termination; and
- prohibition against charging for unsolicited telecoms services.

The Converged Code also includes several mandatory contractual provisions that must be included in all FBO licensees' and SBO licensees' end-user service agreements (namely,

service contracts with business or residential subscribers). These include provisions relating to:

- billing period;
- the prices, terms and conditions upon which service will be provided; procedures for disputing charges; and
- termination or suspension of service.

The IMDA also has the power under the FBO and SBO licences to require licensees to file their schemes of service, including non-price terms and conditions for the provision of services, with the IMDA before the launch or announcement of such services.

Law stated - 19 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

The IMDA's policy framework on net neutrality is set out in a policy paper dated 16 June 2011, which sets out five principles representing its approach towards net neutrality that internet service providers (ISPs) and telecoms network operators are required to adhere to:

- they must not block legitimate internet content or impose discriminatory practices, restrictions, charges or other measures that would effectively render any legitimate internet content inaccessible or unusable;
- they must comply with competition and interconnection rules;
- they must comply with the IMDA's information transparency requirement and disclose to end-users their network management practices and typical internet broadband download speeds;
- ISPs must meet the minimum broadband quality of service standards prescribed by the IMDA. Reasonable network management practices are allowed, provided that minimum internet broadband quality of service standards are adhered to and that such practices will not render any legitimate internet content effectively inaccessible or unusable; and
- they are allowed to offer niche or differentiated services that meet the IMDA's information transparency, minimum quality of service and fair competition requirements.

In particular, the IMDA recognised that to promote the development of online services, ISPs and network operators must be given the flexibility to manage their networks or differentiate their service offerings to meet the needs of changing customer demands or niche user groups. At the same time, such flexibility cannot result in discriminatory practices that render legitimate internet content effectively inaccessible or unusable. In this respect,

the IMDA has indicated in its decision that it intends to deal with any complaints on a case-by-case basis.

In connection with the above, the IMDA requires residential fixed broadband internet access service providers to publish, on their websites, information about their respective network management policies (including whether traffic shaping is implemented).

While there are no express laws or regulations that prevent zero-rating of data transmission by certain services or applications or bandwidth throttling per se, ISPs would nevertheless need to comply with the general principles set out under the IMDA's framework for net neutrality.

Law stated - 19 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

At present, there is no overarching legislation or regulatory framework that specifically deals with digital platforms. In the case of online digital platforms such as search engines, social media platforms and online digital media stores, they may instead be subject to a range of existing legislation and regulatory frameworks that govern specific sectors or subject matter. These may include, without limitation:

- to the extent that a digital platform constitutes a telecoms service, it may be subject to the telecoms licensing and regulatory framework;
- to the extent that a digital platform constitutes a broadcasting service, it may be subject to the broadcasting licensing and regulatory framework. In particular, where the platform operator may be considered to be an internet content provider, it may be deemed to be subject to a broadcasting class licence;
- to the extent that a digital platform constitutes an online communication service, it may be subject to the regulatory framework under the Broadcasting Act and must comply with directions issued by the IMDA and any applicable codes of practice;
- to the extent that the computer or computer system behind the digital platform has been designated as critical information infrastructure (CII) in Singapore, owners of such computers or computer systems are subject to cybersecurity obligations under the Cybersecurity Act 2018 (the Cybersecurity Act);
- to the extent that a digital platform collects, uses or discloses personal data relating to individuals, it may be subject to data protection obligations under the Personal Data Protection Act 2012 (PDPA);
- to the extent that a digital platform is regarded as an internet intermediary (eg, social network, search engine, content aggregator, internet-based messaging service and video-sharing service), it may be subject to directions and obligations under the Protection from Online Falsehoods and Manipulation Act 2019 (POFMA);
- to the extent that a digital platform provides social media services, relevant electronic services or internet access services, it may be subject to directions

issued by the Ministry for Home Affairs (MHA) under the Foreign Interference (Countermeasures) Act 2021 (FICA);

- to the extent that a digital platform provides an online service through which criminal activities (namely, specified offences or malicious cyber activity offence under the First Schedule) could be conducted, it may be subject to directions issued by a designated officer under the Online Criminal Harms Act 2023 (which recently commenced on 1 February 2024); and
- competition issues involving a digital platform may be governed by the general competition law as established under the Competition Act 2004 that is administered by the Competition and Consumer Commission of Singapore (CCCS), or sector-specific regulatory frameworks as administered by the respective regulatory authorities. For example, competition issues that impact the telecoms and media sector may fall within the purview of the IMDA. The Competition Act 2004 provides that it does not apply insofar as another regulatory authority (other than the CCCS) has jurisdiction in a particular competition matter.

Enforcement

In respect of enforcement activity, the POFMA Office has issued directions and orders on several occasions to Facebook to publish correction notices on the Facebook posts of users who had published false statements, as well as to disable access for Singapore users to Facebook pages that had repeatedly conveyed online falsehoods and did not comply with any of the POFMA Directions that had been served on the owners of such pages.

Under FICA, the MHA has directed five major social media platforms (X, Facebook, Instagram, YouTube, and TikTok) to block 95 accounts from Singapore users.

In October 2024, the MHA identified an additional 10 inauthentic websites built by foreign actors that might be used to mount hostile information campaigns against Singapore. The IMDA reviewed the MHA's investigation results and issued directives under the Broadcasting Act, which required relevant internet access service providers to disable access to those 10 inauthentic websites for users in Singapore.

Law stated - 19 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

At present, NGNBN entities are regulated under existing telecommunication and media legislation, and through contractual obligations between them and the IMDA. In particular, the respective ICOs of NetLink Trust and Nucleus Connect, in fulfilment of their contractual obligation under their request-for-proposal bid commitment to the IMDA, set out the prices, terms and conditions upon which they would provide certain mandated NGNBN services.

Also, the IMDA has released specific regulations providing for licensing and regulatory frameworks in 2009 – namely, the NetCo Interconnection Code (updated in April 2020) and the OpCo Interconnection Code (updated in April 2020) – to regulate the activities of the NetCo and OpCo respectively. The Interconnection Codes specify, inter alia, requirements related to the pricing, terms and conditions for the services offered by the NetCo and OpCo under their respective ICOs, as well as the obligations placed on both the NetCo and OpCo and persons requesting services from them. The obligations contained under the Interconnection Codes are in addition to those contained in the Telecoms Act, other statutes, regulations, directions, licences and codes of practice.

Government schemes promoting basic and NGA broadband

The Singapore government has been keenly promoting the development of basic broadband infrastructure, applications and services since the 1990s. Many initiatives have been put in place over the years to promote the establishment of nationwide broadband networks. The government has also devoted significant efforts to encourage the roll-out and take-up of NGA broadband services, in particular, service offerings over the NGNBN. In 2015, the Singapore government launched the 10-year Infocomm Media 2025 master plan, which seeks to be a key enabler of the Singapore government's vision to transform Singapore into the world's first Smart Nation, by harnessing the power of technology. In February 2024, the IMDA announced that it will invest up to S$100 million to upgrade the Nationwide Broadband Network to speeds up to 10Gbps by 2028.

In terms of government financial schemes for the promotion of an NGNBN, it was announced in December 2007 that the government would grant up to S$750 million for the development of this high-speed broadband network. This is part of the government's intention to adopt a public-private partnership approach concerning the building, ownership and operation of the network. In particular, the government hopes that more small firms will be able to offer online services without being burdened by the cost of building the network. In line with the promotion of NGNBN, the IMDA has also spearheaded other broadband initiatives, including the Singapore Internet Exchange (SGIX), which serves as a neutral internet exchange for local and international IP traffic. By establishing multiple nodes in different sites in Singapore as its core, the SGIX plays a significant role in the deployment of services over the NGNBN, allowing for the efficient exchange of traffic, reducing latency and ensuring sustainable, reliable transmission of bandwidth-intensive services to end-users.

To complement the NGNBN, a wireless broadband network has also been deployed in key catchment areas around Singapore: Wireless@SG allows end-users to enjoy indoor and outdoor wireless broadband access in public areas.

Law stated - 19 May 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

The IMDA has prescribed specific rules for the telecommunication sector. Section 3.2.6 of the Converged Code contains provisions that govern the use of end-user service information by all FBO and SBO licensees. Different provisions may apply, depending on whether the licensee is dealing with a business end-user or a residential end-user. The IMDA's standard licence conditions also include provisions requiring licensees to ensure the confidentiality of customer information.

On a more general level, the PDPA established a baseline standard of data protection for all private sector organisations in Singapore. The PDPA also established a 'Do Not Call' registry that allows individuals to register their Singapore telephone numbers to opt out of receiving telemarketing calls and messages. The PDPA imposes data protection obligations on organisations that collect, use or disclose personal data in Singapore. Among other things, organisations are required to obtain an individual's consent before collecting, using or disclosing his or her personal data, unless an exception in the PDPA applies. Other obligations under the PDPA include requiring organisations to:

- make a reasonable effort to ensure that personal data they collect is accurate and complete if the personal data is likely to be used by the organisation to make a decision that affects the individual or is likely to be disclosed by the organisation to another organisation; and
- make reasonable security arrangements to prevent unauthorised access, collection, use, disclosure, copying, modification, disposal or similar risks, and to prevent the loss of any storage medium or device on which personal data is stored.

The Personal Data Protection Commission (PDPC), which is responsible for administering the PDPA, has also issued a set of advisory guidelines that specifically aim to address certain unique circumstances faced by the telecommunication sector in complying with the PDPA.

The PDPA is not intended to override sector-specific data protection frameworks. To the extent of any inconsistency between the provisions of the PDPA and the provisions of other written laws, the latter will prevail. Also, the PDPA's provisions on data protection do not affect any obligation imposed by or under the law (except for contractual obligations), which may include regulatory obligations imposed under other written laws. Hence, licensees will need to ensure that they comply with any sector-specific obligations such as the Converged Code, as well as the general framework under the PDPA.

Law stated - 19 May 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The primary legislative framework governing cybersecurity in Singapore is the Cybersecurity Act.

Broadly, the Cybersecurity Act:

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creates a framework for the protection of designated CII against cybersecurity threats;

- provides for the appointment of the Commissioner of Cybersecurity (Commissioner) and other officers for the administration of the Cybersecurity Act;
- authorises the taking of measures to prevent, manage and respond to cybersecurity threats and incidents in Singapore; and
- establishes a licensing framework for providers of licensable cybersecurity services in Singapore; specifically, managed security operations centre monitoring services and penetration testing services.

Under the Cybersecurity Act, the Commissioner is empowered to issue codes of practice and standards of performance to ensure the cybersecurity of CII. Pursuant to these powers, the Commissioner has issued the Cybersecurity Code of Practice for Critical Information Infrastructure.

The Cybersecurity Act provides for the regulation of CII in 11 critical sectors. CII is defined as a computer or computer system that is necessary for the continuous delivery of an essential service, the loss or compromise of which will lead to a debilitating effect on the availability of the essential service in Singapore. The 11 critical sectors containing essential services from which CII may be designated include the info-communications and media sectors.

The Cybersecurity Act operates alongside the patchwork of existing legislation and various self-regulatory or co-regulatory codes that promote cybersecurity, including but not limited to the following:

- the Computer Misuse Act 1993 (CMA), which criminalises certain cyber activities such as hacking, denial-of-service attacks, infection of computer systems with malware, the possession or use of hardware, software or other tools to commit offences under the CMA, and other acts preparatory to or in furtherance of the commission of any offence under the CMA;
- the PDPA and the regulations issued thereunder, which impose certain obligations on organisations to make 'reasonable security arrangements' to prevent unauthorised access, collection, use, disclosure, copying, modification, disposal or similar risks concerning personal data held or processed by those organisations. The PDPC has issued general guides that, while not legally binding, provide greater clarity on, for instance, the types of reasonable security arrangements that can be adopted by organisations in the protection of personal data. These general guides include:
    - the Guide to Managing and Notifying Data Breaches Under the PDPA;
    - the Guide to Data Protection by Design for ICT Systems;
    - the Guide to Securing Personal Data in Electronic Medium; and
    - the Guide on Building Websites for SMEs; and
    - sector-specific codes of practice, such as the Telecommunication Cybersecurity Code of Practice formulated by the IMDA, which is imposed on

major internet service providers in Singapore and includes security incident management requirements.

On 3 April 2024, the Cybersecurity (Amendment) Bill (Bill) was introduced in Parliament, following a public consultation by the Cybersecurity Agency of Singapore (CSA) from 15 December 2023 to 15 January 2024 on the proposed amendments. When the Cybersecurity Act 2018 was first enacted, providers of essential services tended to own and control the CII used for continuous delivery of the essential services they were responsible for. To keep up with the evolving business landscape, the amendments will expand the CSA's oversight beyond CII owners to:

- designated essential service providers who do not own the CII used for the essential services for which they are responsible;
- major foundational digital infrastructure service providers (namely, cloud computing service providers and data centre facility service providers);
- entities of special cybersecurity interest; and
- owners of systems of temporary cybersecurity concern.

The Bill was passed by the Singapore Parliament on 7 May 2024. At the time of writing, the Cybersecurity (Amendment) Act 2024 has yet to come into operation.

Apart from the CSA, other government agencies have issued guidelines for cybersecurity in specific industries. For example, the IMDA's Advisory Guidelines for resilience and security of Cloud Services and Data Centres recommended measures for cloud service providers and data centre operators to strengthen their service security and resilience. For cloud services, the guidelines outline seven key security categories, including testing protocols, access management controls, data governance frameworks, and disaster recovery planning. For data centres, the guidelines establish a comprehensive business continuity management framework aimed at minimising service disruptions and maintaining high availability. This includes implementing robust continuity policies, establishing effective controls and processes, conducting ongoing reviews for continuous improvement, and addressing cybersecurity vulnerabilities.

Law stated - 19 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

In Singapore, there is no legislation or regulation that specifically deals with big data per se. Rather, companies involved in big-data-related activities must ensure that they comply with existing data protection laws and regulatory frameworks as may be applicable, such as the PDPA and the Cybersecurity Act.

Law stated - 19 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

There is no overarching law or regulation that requires data, in general, to be stored locally in Singapore. The PDPA does not require personal data to be stored locally in Singapore. Nonetheless, organisations that wish to transfer personal data outside of Singapore would need to ensure that they fulfil certain requirements under the PDPA and its accompanying regulations, before such personal data may be transferred outside Singapore. Furthermore, specific types of data may be the subject of regulatory obligations requiring that they be stored in Singapore. For example, licensed telecom operators may be required to store call detail records in Singapore pursuant to their licence conditions.

Law stated - 19 May 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

Amendments to the Cybersecurity Act

The Bill was passed by the Singapore Parliament on 7 May 2024.

The Bill is intended to expand the scope of the Cybersecurity Act to regulate four new classes of persons.

- Designated providers of essential services who do not own the CII used for the continuous delivery of the essential services for which they are responsible (namely, third-party owned CII): the provider of essential services is intended to be required to obtain legally binding commitments from the third-party to provide the necessary information or adhere to prescribed standards relating to cybersecurity, etc, so that they can discharge their duties under the Cybersecurity Act. If they do not obtain the legally binding commitments, they may be ordered by the Commissioner to cease using the third-party owned CII.
- Owners of systems of temporary cybersecurity concern (STCC): STCC are computer or computer systems that are critical to Singapore for a time-limited period, and for that period, are at high risk of cyberattacks. Examples include systems that are set up specifically to support high-profile international events in Singapore (eg, the World Economic Forum), or systems set up to support the distribution of vaccines during the covid-19 pandemic.
- Entities of special cybersecurity interest (ESCI): ESCI are entities that are particularly attractive targets of malicious threat actors seeking to compromise a state because of the sensitive data that they possess or the function that they perform. ESCI include systems that if compromised could have a significant

detrimental effect on the defence, foreign relations, economy, public health, public safety, or public order of Singapore.

- Providers of major foundational digital infrastructure services (FDI): FDI is digital infrastructure that provides infrastructural services of a foundational nature. Examples of FDI include cloud computing and data facility services that are integral to the functioning of Singapore's technological stacks.

Through these new classes, the CSA aims to fulfil the following policy objectives:

- enhance the CSA's situational awareness of the cybersecurity threats and incidents targeting these systems; and
- ensure that appropriate cybersecurity measures are taken to secure them.

These new classes of persons are generally required to comply with the same duties and obligations imposed on traditional CII providers. Such duties include duties to:

- provide the Commissioner with information on the system;
- comply with such codes of practice, standards of performance or written directions in relation to the system as may be issued by the Commissioner; and
- notify the Commissioner of prescribed cybersecurity incidents.

Furthermore, for existing provider-owned CII, the Bill seeks to widen requirements for incident reporting. The types of incidents to be reported include:

- prescribed cybersecurity incidents in respect of any other computer or computer system under the owner's control that does not fall within section 14(1)(b) of the Cybersecurity Act; and
- prescribed cybersecurity incidents in respect of any computers or computer systems under the control of a supplier to the owner that is interconnected or communicates with the provider-owned CII.

New Digital Infrastructure Act in consideration

The Ministry of Communications and Information announced that the inter-agency Taskforce on the Resilience and Security of Digital Infrastructure and Services (Taskforce) is studying the introduction of a Digital Infrastructure Act (DIA) to enhance the resilience and security of key digital infrastructure and services.

The DIA is intended to complement the government's other regulatory levers, such as the Cybersecurity Act which focuses on mitigating cyber-related risks. It will go beyond cybersecurity to address a broader set of resilience risks faced by digital infrastructure and service providers, ranging from misconfigurations in technical architecture, to physical hazards such as fires, water leaks and cooling system failures.

The Taskforce is studying the digital infrastructure ecosystem in Singapore to identify those which would have a systemic impact on Singapore's economy and society if disrupted. Examples include data centres and cloud services, and support the delivery of many widely used digital services (eg, banking and payments, ride-hailing, digital identities). The DIA will be tabled in Parliament later in 2025.

Measures to address rise in phishing scams

There has been a recent spate of SMS phishing scams, targeting, in particular, customers of local banks. In December 2021, S$13.7 million was reported to have been lost in phishing scams affecting customers of one of Singapore's largest banks, OCBC.

In response, the IMDA (through its subsidiary, the Singapore Network Information Centre) established a new Singapore SMS Sender ID Registry. With effect from 14 October 2022, that registration with the Singapore SMS Sender ID Registry became mandatory for all organisations that use SMS sender IDs, such that only bona fide organisations can use such sender IDs. From 31 January 2023 onwards, all non-registered sender IDs will be marked as 'Likely-SCAM' as a default for a transition period of around six months. Thereafter, messages with such non-registered sender IDs will be blocked and not delivered to end-users. Additionally, telecom operators will implement SMS anti-scam filtering solutions within their mobile networks to filter and block such messages before they reach the public.

On 16 December 2024, the Monetary Authority of Singapore (MAS) and the IMDA implemented a shared responsibility framework (SRF) for phishing scams. The SRF assigns financial institutions (FIs) and telecommunication companies (Telcos) relevant duties to mitigate phishing scams, and requires payouts to affected scam victims where these duties are breached. Examples of these duties include sending an outgoing transaction notification to consumers in the case of FIs, and implementing a scam filter in the case of Telcos.

New measures to strengthen consumer protection for telecommunication and media services

On 1 April 2022, the Telecommunications (Dispute Resolution Scheme) Regulations 2022 and the Info-communications Media Development Authority (Dispute Resolution Scheme) Regulations 2022 came into effect.

Both regulations were introduced by the IMDA to strengthen consumer protection in telecommunication and media services, as part of the IMDA's alternative dispute resolution (ADR) scheme. The ADR scheme is intended to provide an affordable and effective dispute resolution alternative for consumers facing contractual disputes with their service providers.

The ADR scheme covers disputes or issues related to all telecoms and media services with a maximum dispute value of S$10,000. The dispute must also have occurred within the past year and should be resolvable through service recovery efforts or compensated for in-kind or in monetary terms.

The ADR process, which consists of two stages comprising mediation, followed by a determination for disputes that are not resolved after mediation, is expected to take no more than two-and-a-half months. In the first stage, once a case is submitted, the service provider will be given a 14-day notice period (namely, a notice of intention period) whereby the service provider and consumer can negotiate and resolve the dispute. If that does not work out, the parties go into mediation. If mediation still does not work, the consumers may choose whether to proceed with determination.

On top of the ADR scheme, the IMDA will also make available data on consumer complaints received by telecom service providers and their performance in handling complaints.

New measures for data centre sustainability

Singapore has had a moratorium on new data centre projects since 2019 due to resource constraints. However, on 20 July 2022, the IMDA and the Economic Development Board launched a pilot Data Centre – Call for Application Exercise to facilitate the building of new data centre capacity and allow for the calibrated and environmentally sustainable growth of data centres in Singapore.

Applicants were required to provide proposals on how they intended to run the most resource-efficient data centre that is best in class. Some requirements included having to obtain platinum certification for the data centre under the Building Construction Academy and the IMDA's Green Mark for New Data Centre criteria, having a power usage effectiveness of 1.3 or better and providing proposals on how it will best achieve sustainability goals through renewable energy and plans to invest in innovative energy pathways to offset the carbon emissions footprint. The call for applications closed on 21 November 2022.

On 8 June 2023, the IMDA launched the world's first standard for optimising energy efficiency for data centres in tropical climate countries. The new standard aims to help data centres develop a roadmap to support the gradual increase in the data centre operating temperatures to 26 degrees centigrade and above. This could lead to data centres potentially benefiting from a 2 per cent to 5 per cent cooling energy savings, with every one-degree centigrade increase in the data centre operating temperature. Pilot trials are already underway with several data centre operators in Singapore to trial this new standard to reduce energy use.

On 30 May 2024, the IMDA launched its Green Data Centre Roadmap to support sustainable growth of Singapore's data centre industry while meeting increasing computing demands driven by AI, robotics, and virtual technologies. The roadmap aims to provide at least 300 megawatts of additional capacity in the near term, with future expansion through green energy deployments.

Amendments to the PDPA

On 2 November 2020, the Singapore Parliament passed the Personal Data Protection (Amendment) Bill 2020 following the first comprehensive review of the PDPA since its enactment in 2012. The amendments to the PDPA, introduced several significant changes such as:

- a mandatory data breach notification regime for data breaches;
- new exceptions to the consent obligation (legitimate interests' exception and business improvement exception);
- an expansion of the concept of deemed consent (deemed consent by notification and deemed consent by contractual necessity);
- new offences for the:

- mishandling of personal data;
- knowing or reckless unauthorised use of personal data; and
- knowing or reckless unauthorised re-identification of anonymised data;

- higher financial penalties (from a maximum of S$1 million previously, to up to a maximum of 10 per cent of the organisation's annual turnover in Singapore); and
- provisions on data portability (not yet in force).

Most of the changes under the Amendment Act came into effect on 1 February 2021. On 1 October 2022, the provisions relating to enhanced financial penalties came into effect. The provisions on data portability have yet to come into effect at the time of writing.

Law stated - 19 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The Info-communications Media Development Authority (IMDA) is the statutory body responsible for broadcasting and content regulation (irrespective of the transmission medium) and the primary applicable legislation is the Info-communications Media Development Authority Act 2016 (the IMDA Act) and the Broadcasting Act 1994 (the Broadcasting Act). The IMDA was formally established on 1 October 2016 as a converged regulator for the info-communications and media sectors. At present, the telecoms and media sectors continue to be governed by separate regulatory frameworks.

Under the existing framework, 'media' is defined in the IMDA Act as referring to any film, newspaper, broadcasting service or publication (as defined in the Films Act 1981- , Newspaper and Printing Presses Act 1974, the Broadcasting Act and the Undesirable Publications Act 1967 respectively). The Minister for Communications and Information (the Minister) may further specify in the Gazette any other medium of communication of information, entertainment or other matter to the public to be included under 'media'.

In respect of policy formulation, the IMDA consults several committees in creating and developing its regulatory framework. These include various programme advisory committees for broadcast programmes in different languages and several other consultative panels. Their members are drawn from a cross-section of society and the media industry.

Furthermore, under the existing framework at the time of writing, content and broadcasting regulation remain separate from infrastructure regulation. Therefore, firms should be mindful that they must comply with both the licensing and regulatory requirements imposed by the IMDA for content and broadcasting, as well as for the establishment and operation of any infrastructure.

Law stated - 19 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Foreign investors

There are provisions under the Broadcasting Act regulating foreign participation in a broadcasting company. Prior approval of the IMDA must be obtained if a person wishes to receive funds from a foreign source to finance any broadcasting service owned or operated by a broadcasting company (section 43(1) of the Broadcasting Act). Also, no company (unless the Minister approves otherwise) is to be granted or permitted to hold a relevant licence (as defined in the Broadcasting Act) if the Minister is satisfied that any foreign source, alone or together with one or more foreign sources:

- holds no less than 49 per cent of the shares in the company or its holding company;
- is in a position to control voting power of no less than 49 per cent in the company or its holding company; or
- all or a majority of the persons having the direction, control or management of the company or its holding company are appointed by, or accustomed to or under an obligation to act in accordance with the directions of, any foreign source.

Ownership controls

The Broadcasting Act contains ownership and control provisions that apply to broadcasting companies as defined therein. A 'broadcasting company' is a Singapore-incorporated company or Singapore branch office that holds a 'relevant licence'. A relevant licence refers to any free-to-air licence, or any broadcasting licence under which a subscription broadcasting service may be provided, that permits a broadcast capable of being received in 50,000 dwelling houses (which is defined to include hotels, inns, boarding houses and other similar establishments) or more. Also, the Minister may designate any other broadcasting licence as a relevant licence on public interest or national security grounds. A class licence will not be considered a relevant licence.

Under the Broadcasting Act, no person may, on or after 2 September 2002, become a substantial shareholder, a 12 per cent controller or an indirect controller of a broadcasting company without first obtaining the approval of the Minister. The term 'substantial shareholder' is defined under section 81 of the Companies Act 1967 and generally refers to a person who has an interest in not less than 5 per cent of the voting shares in a company. The terms '12 per cent controller' and 'indirect controller' are defined in section 36 of the Broadcasting Act.

Under section 33(2) of the Broadcasting Act, unless the IMDA approves otherwise, the chief executive officer of a broadcasting company and at least half of its directors must

be citizens of Singapore. A broadcasting company may request to be exempt from this requirement, and exemptions have been made by the Minister.

Notably, the category of niche subscription television licensees has been exempted from all foreign ownership restrictions.

Broadcasting licensees that are regulated persons (within the meaning of section 2 of the IMDA Act) are subject to the provisions on consolidations and mergers in the IMDA Act and the Code of Practice for Competition in the Provision of Telecommunication and Media Services 2022 (the Converged Code).

Cross-ownership

No regulations specifically prohibit the cross-ownership of media companies, including radio, television and newspapers. Such mergers and acquisitions between media companies are regulated by the IMDA. The prior written approval of the IMDA is required for all consolidations or mergers between a regulated person (as defined in the IMDA Act) and another regulated person, or any other person (not being a regulated person) carrying on business in the media industry (section 65 of the IMDA Act). Section 10 of the Converged Code details the IMDA's regulation of such consolidation activities.

Law stated - 19 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Under section 5 of the Broadcasting Act, the IMDA may grant two types of licences: broadcasting licences and broadcasting apparatus licences.

Broadcasting licences

To broadcast programmes in Singapore, a person must obtain a broadcasting licence from the IMDA. Broadcasting licences may be granted for the following categories of licensable broadcasting services:

- free-to-air nationwide, localised and international television services;
- subscription nationwide, localised and international television services;
- special interest television services;
- free-to-air nationwide, localised and international radio services;
- subscription nationwide, localised and international radio services;
- special interest radio services;
- audiotext, videotext and teletext services;
- video-on-demand services;
- broadcast data services; and

- computer online services.

Licence fees that have been published by the IMDA as payable for the following broadcasting services include:

- 2.5 per cent of total revenue or S$250,000 per annum, whichever is higher, and a performance bond of S$200,000 for a free-to-air nationwide television licence;
- 2.5 per cent of total revenue and a performance bond of S$200,000 for a free-to-air nationwide radio service licence;
- S$5,000 per annum for a subscription international television services licence (commonly known as a satellite broadcasting licence). A performance bond of S$50,000 must be given to the IMDA by broadcasters not based or registered in Singapore. The performance bond must be issued by a financial institution approved by the IMDA;
- 2.5 per cent of total revenue for a nationwide subscription television licence, subject to a minimum licence fee of S$50,000 per year throughout. Also, a performance bond of S$200,000 must be furnished; and
- S$1,000 per year for a television receive-only (TVRO) licence (per satellite dish). For a temporary TVRO licence, the licence fee is S$100 per dish for a period of up to 30 days.

Section 8(2) of the Broadcasting Act provides that a broadcasting licence must be in such a form and for such a period and may contain such terms and conditions as the IMDA may determine. The Broadcasting Act sets out certain conditions that licensees must comply with, such as compliance with the IMDA's codes of practice and certain public service broadcasting obligations. Templates of such licences are not publicly available. As a rough guide, new applications are generally processed within the following timeframes:

- for local broadcasting licences: approximately 35 working days;
- for a subscription international television service licence: approximately 20 working days; and
- for a TVRO licence: approximately 15 working days.

In addition to the individual broadcasting licences listed above, the IMDA has specified that the following licensable broadcasting services are subject to the class licence regime under the Broadcasting (Class Licence) Notification:

- audiotext, videotext and teletext services;
- broadcast data services;
- virtual area network computer online services; and
- computer online services that are provided by internet content providers and internet service providers (ISPs).

A company wishing to provide a licensable broadcasting service that is subject to the class licence regime above must register with the IMDA. In particular, audiotext service providers, and internet content providers determined to be a political party registered in Singapore

providing any programme through the Internet, and ISPs must register with the IMDA within 14 days of commencing the service.

All class licensees must comply with the licence conditions contained in the Broadcasting (Class Licence) Notification. Also, internet content providers and ISPs must comply with the Internet Code of Practice. The yearly fees payable for the services listed below have been published in the Schedule of the Broadcasting (Class Licence) Notification:

- S$2,000 for the provision of teletext services;
- S$1,000 for the provision of computer online services by internet access service providers;
- S$1,000 for the provision of computer online services by non-localised internet service resellers (with 500 or more user accounts);
- S$100 for the provision of computer online services by non-localised internet service resellers (with less than 500 user accounts); and
- S$100 (per premise) for the provision of computer online services by a localised internet service reseller.

The fees payable for the services not mentioned in the Broadcasting (Class Licence) Notification are not publicly available. If broadcasting infrastructure is to be deployed, a separate licence from the IMDA may also be required.

Separately, digital display panels operating on a distribution network (Distribution Network DDPs) that are installed in public places and within public passenger transport vehicles are also subject to the class licence regime under the Broadcasting (Class Licence — Broadcasting to Digital Display Panels) Notification 2020. This class licence is automatic and there are no requirements on operators of Distribution Network DDPs to register, pay licence fees or put up a performance bond.

Broadcasting apparatus licences

To install, import, sell or operate any broadcasting apparatus in Singapore, a person must obtain a licence from the IMDA under section 20 of the Broadcasting Act. This requirement applies to apparatus currently listed under the First Schedule to the Broadcasting Act (namely, the TVRO system). The IMDA retains the discretion to exempt any person or broadcasting apparatus (or class thereof) from this licence requirement.

Law stated - 19 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

There are no express regulations concerning the broadcast of foreign programmes, irrespective of the media type. Such broadcasts are, however, subject to paragraph 16 of the Schedule to the Broadcasting (Class Licence) Notification, which states that an internet

content provider licensee shall remove or prohibit the broadcast of the whole or any part of a programme included in its service if the IMDA informs the licensee that its broadcast is against the public interest, public order or national harmony, or offends good taste or decency.

Similarly, all ISPs and internet content providers licensed under the Broadcasting (Class Licence) Notification are required to comply with the Internet Code of Practice, which prohibits any broadcasting service from broadcasting content that is against public interest or order, national harmony or which offends against good taste or decency.

There are no explicit rules requiring a minimum amount of local content. However, under section 17 of the Broadcasting Act, the IMDA may require a broadcasting licensee to broadcast programmes provided by the IMDA or the Singapore government as a condition of its licence, including the following:

- programmes for schools or other educational programmes;
- news and information programmes produced in Singapore or elsewhere;
- arts and cultural programmes; and
- drama and sports programmes produced in Singapore.

Furthermore, free-to-air television and subscription television broadcasting licensees may be subject to programme codes issued by the IMDA containing programming and content guidelines, such as the Content Code for Nationwide Managed Transmission Linear Television Services and the Content Code for Over-the-Top, Video-on-Demand and Niche Services. Generally, programme codes will contain guidelines congruent with national objectives, uphold racial and religious harmony, observe societal and moral standards and promote positive family values.

Law stated - 19 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

At present, stricter content standards are applied to advertisements in public places (given their unsolicited viewing) and in media that have a wider impact on the general public, such as advertisements on television. The Advertising Standards Authority of Singapore (ASAS) lays down broad industry codes and guidelines. The Singapore Code of Advertising Practice (SCAP) is reviewed periodically by ASAS and includes a chapter on the statutes and statutory instruments that have special relevance to advertising and related trading practices. The basic premise of the SCAP is that all advertisements should be legal, decent, honest and truthful. The SCAP applies to all advertisements for any goods, services and facilities appearing in any form or any media, including online advertisements in information network services, electronic bulletin boards, online databases and internet services. The SCAP seeks to promote a high standard of ethics in advertising through self-regulation against the background of national and international laws and practices, including the International Code of Advertising Practice published by the International

Chamber of Commerce. In August 2016, ASAS also issued Guidelines for Interactive Marketing Communication & Social Media (Interactive and Social Media Guidelines), which set out standards for advertising and marketing communication that appear on interactive and social media. The Interactive and Social Media Guidelines set the standard of ethical conduct that is to be adopted by all marketers, establish the levels of disclosure that are required of sponsored messages that appear on social media, prohibit false reviews and engagement, and dictate the clarity of the purchase process in e-commerce. Between November 2017 and January 2018, ASAS conducted a public consultation seeking post-implementation feedback on the Interactive and Social Media Guidelines. In particular, it sought feedback on the implementation of the guidelines, and areas where the guidelines might be fine-tuned or updated.

Alongside ASAS, the IMDA also plays a role in guiding the advertising industry when the need arises. For television broadcasts, the IMDA issues advertising codes to broadcasters, which are stricter than those for the print media, because of the wider reach of television broadcasts. The IMDA has issued the Television and Radio Advertising and Sponsorship Code (the Advertising Code), which aims to protect the interests of viewers as consumers and requires advertisements to be truthful, lawful and not contain any misleading claims. All claims and comparisons must be capable of substantiation. The Advertising Code requires advertisements to respect public taste and interests and uphold moral and social values. Among other things, the Advertising Code also stipulates that broadcasters should exercise discretion when scheduling advertisements and trailers to ensure that these are appropriate for the viewing audience.

Concerning holders of class licences, paragraph 16 of the Schedule to the Broadcasting (Class Licence) Notification states that a licensee shall remove or prohibit the broadcast of the whole or any part of a programme included in its service if the IMDA informs the licensee that its broadcast is against the public interest, public order or national harmony, or offends good taste or decency. In the case of online advertising, internet content providers and ISPs are considered class licensees and must also comply with paragraph 16 of the Schedule to the Broadcasting (Class Licence) Notification. Also, paragraph 13(a) of the same requires licensees to comply with the IMDA's codes of practice. In this respect, the IMDA-administered Internet Code of Practice requires class licensees to use their best efforts to ensure that prohibited material is not broadcast over the internet to users in Singapore. Examples of prohibited material include, without limitation, content that endorses ethnic, racial or religious hatred, strife or intolerance, and material that depicts extreme violence.

Separately, the Undesirable Publications Act 1967 prevents the importation, distribution or reproduction of undesirable publications. This may include advertisements that are accessible by computers or other electronic devices, such as online advertisements.

Law stated - 19 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

The Broadcasting Act provides for a must-carry obligation. Under section 19 of the Broadcasting Act, the IMDA may, by a direction in writing, require a broadcasting licensee to provide for transmission and reception of any broadcasting service that is provided by any other person, and that is specified in its licence or is of a description so specified, notwithstanding any other provisions in the Broadcasting Act stating otherwise.

Currently, must-carry obligations are imposed on all nationwide subscription television licensees to allow their subscribers to access all local free-to-air channels on their network.

Sections 11.1.4 and 11.6 of the Converged Code establish a cross-carriage measure for the pay-television sector, under which a mandatory obligation is imposed upon all licensed subscription television service providers that acquire exclusive broadcasting rights to any channel or programming content (supplying licensees) to provide such channels or content for cross-carriage on the pay-television network of other subscription nationwide television service providers, that are in turn obliged to carry such channels and content on all 'relevant platforms' (as defined in section 11.3(h) of the Converged Code) in their entirety, with no alteration or degradation in quality. A relevant platform means a managed network over or using any (or any combination of) optical fibre or asymmetric digital subscriber line.

Under section 11.4 of the Converged Code, free-to-air television and radio licensees (and any other person as the IMDA may direct) must comply with the IMDA's requirements regarding the broadcast of events that are of national significance. The IMDA will provide written notification to free-to-air television and radio licensees regarding the events of national significance that they are to broadcast. The IMDA will generally designate only very select events as events of national significance that are to be broadcast live or delayed.

If it is not desirable for more than one entity to locate cameras and other equipment at the site of such an event, the IMDA may select a broadcaster to be the sole broadcaster for the event (the lead broadcaster) or conduct a competitive tender for the position. The lead broadcaster must make the feed from the event available to all free-to-air television and radio licensees and any other person that the IMDA specifies.

Any television or radio licensee that receives the feed from the lead broadcaster must compensate the lead broadcaster for reasonable costs that are not otherwise compensated (eg, through government subsidies) incurred by the lead broadcaster in providing the television or radio licensee with the feed.

Law stated - 19 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

The IMDA adopts a two-tier licensing framework for the provision of internet protocol television (IPTV) services in Singapore: a nationwide subscription television licence and niche television service licence (niche licence).

The niche licence was introduced to facilitate the growth of IPTV and other novel services in Singapore by offering operators greater flexibility to roll out services for different market

segments, with less onerous regulatory obligations. It is for service providers targeting specific niche market segments.

The nationwide subscription television licence applies to operators targeting the mass market. The first nationwide IPTV licence was awarded to SingNet Pte Ltd (SingNet) in January 2007 for the provision of its mio television service, which has since been renamed Singtel TV.

Licence applicants are free to decide which licence tier they wish to operate under.

Social media services

The Broadcasting Act was amended on 1 February 2023 to provide greater regulatory oversight on egregious content on social media services and to regulate providers of online communication services. There are two key parts to the regulatory approach:

- requiring online communication services with significant reach or impact to comply with applicable codes of practice; and
- dealing with egregious content on an online communication service.

In particular, the IMDA may designate an online communication service as a regulated online communication service. This imposes an obligation on the regulated online communication service provider to comply with any codes of practice issued by the IMDA and put in place measures on their services to mitigate the risks of danger to Singapore users from exposure to harmful content and provide accountability to their users on such measures.

On 18 July 2023, the IMDA published the Code of Practice for Online Safety, which sets out obligations that designated social media services (DSMSs) need to comply with. The code aims to mitigate the risks from harmful social media content to Singapore users, especially children, by requiring DSMSs to enhance online safety in Singapore and curb the spread of harmful content on their services. The key obligations that DSMSs need to comply with under the code include:

- minimising Singapore users' exposure to harmful content, with additional protection for children;
- empowering Singapore users with effective and easy-to-use reporting mechanisms to report harmful content or unwanted interactions; and
- being accountable to Singapore users by providing transparency on their measures and levels of safety in annual online safety reports.

The IMDA is also empowered to issue directions to any provider of a social media service to disable access to the egregious content by Singapore end-users or to stop delivery or communication of content to an account or accounts of all Singapore end-users or any particular group of end-users comprising one or more Singapore end-users. The IMDA may also direct the provider of an internet access service to block access by Singapore end-users to the social media service if an online communication service provider fails to comply with the IMDA's direction.

On 31 March 2025, the IMDA's Code of Practice for Online Safety for App Distribution Services took effect. Under the code, designated app distribution service providers shall put in place system-level measures to curtail the risk of exposure to harmful content for users, especially children who are particularly vulnerable when exposed to inappropriate content online. Such service providers will also be required to put in place age- assurance measures to determine whether the users on their platforms are children and ensure better protection for them.

Online news sites

Since 1 June 2013, online news sites that report regularly on issues relating to Singapore and have significant reach among local readers are required by the IMDA to obtain an individual licence, placing them on a more consistent regulatory framework with traditional news platforms that are already individually licensed.

Under the licensing framework, online news sites will be individually licensed if they report an average of at least one article per week on Singapore news and current affairs over a period of two months, and are visited by at least 50,000 unique internet protocol addresses from Singapore each month over a period of two months.

These sites were previously automatically class-licensed under the Broadcasting Act. Presently, when the IMDA has assessed that a site has met the criteria to be individually licensed, the IMDA will issue a formal notification, and work with the site to move it to the new licensing framework.

The IMDA has stated that it does not expect any changes in content standards to result. Individually licensed news sites will be expected to comply within 24 hours with the IMDA's directions to remove content found in breach of content standards and will be required to put up a performance bond of S$50,000.

Law stated - 19 May 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

Singapore has completed its digital switchover and analogue television channels have been switched off since 1 January 2019.

In June 2012, the then Media Development Authority (now the IMDA) announced that all free-to-air channels would be transmitted digitally by the end of 2013 using the digital video broadcasting – second-generation terrestrial broadcasting standard. In this regard, the nationwide free-to-air broadcaster MediaCorp announced that it would transmit all free-to-air channels in digital format from December 2013. To ensure a smooth switchover, there was a simulcast period during which all free-to-air channels were broadcast in digital and analogue until the switchover was fully completed.

In January 2016, the Ministry of Communications and Information, which is the parent ministry overseeing the IMDA, announced that it aimed to complete the switchover and

switch off analogue broadcasting by the end of 2017. Freed-up spectrum has been reallocated to mobile broadband services in the 2016–2017 spectrum allocation exercise by the IMDA, which administers the allocation of radio-frequency spectrum.

In November 2017, the Singapore government announced a further one-year extension of the cessation of analogue broadcast from the end of 2017 to the end of 2018. The purpose of this extension was to give households more time to make the switch from analogue to digital broadcasting. On 1 January 2019, the switchover was completed and all broadcast free-to-air television programmes are now exclusively shown in digital format.

Law stated - 19 May 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

The IMDA's Spectrum Management Handbook explains that planning and channelling of the broadcasting spectrum are carried out at the international level (International Telecommunication Union), regional level (Asia-Pacific Broadcasting Union) and bilateral levels (namely, border coordination with neighbouring countries). As such, there are only a certain number of channels in each broadcasting band that can be used in Singapore. The usage plans for broadcasting services have already been established. With the advent of digital broadcasting, the IMDA has also planned spectrum allocations for both digital audio and digital video broadcasting. To provide broadcasting services, a broadcast service licence and a broadcasting station licence are required from the IMDA.

Law stated - 19 May 2025

Media plurality

26 | Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

Singapore does not currently have a formal process or framework in place to assess media plurality.

Law stated - 19 May 2025

Key trends and expected changes

27 | Provide a summary of key emerging trends and hot topics in media regulation in your country.

New laws to address harmful online content

On 1 February 2023, the Broadcasting Act was amended to allow for the regulation of egregious content on social media services and providers of online communication services. This represents a paradigm shift in Singapore's content regulation landscape evincing Singapore's adoption of a tougher stance against the rising prevalence of harmful online content.

Law stated - 19 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The Info-communications Media Development Authority (IMDA) was officially formed on 1 October 2016 as a converged regulator for the info-communications and media sectors, following the restructuring of the Infocomm Development Authority and the Media Development Authority. At present, the telecoms and media sectors continue to be governed by separate regulatory frameworks.

Under the existing regulatory framework, competition issues in the telecoms and media sectors may be governed by sector-specific rules as administered by the IMDA.

The Competition Act 2004, which establishes the general competition law and is administered by the Competition and Consumer Commission of Singapore (CCCS), provides that it does not apply insofar as another regulatory authority (other than the CCCS) has jurisdiction in a particular competition matter. Accordingly, the CCCS does not have jurisdiction over competition issues that fall under the purview of the IMDA.

On 19 March 2021, the IMDA concluded its second public consultation on the draft converged competition code governing the telecoms and media sectors, which was published on 5 January 2021. On 18 April 2022, the IMDA issued a new converged competition code, the Code of Practice for Competition in the Provision of Telecommunication and Media Services 2022 (Converged Code), to govern competition and market-related matters in both the telecoms and media markets, which took effect on 2 May 2022.

Law stated - 19 May 2025

Appeal procedure

29 How can decisions of the regulators be challenged and on what bases?

Under section 89 of the Telecommunications Act 1999, any telecoms licensee aggrieved by an IMDA decision or direction, or anything in any code of practice or standard of

performance, and certain other aggrieved persons, may request the IMDA to reconsider the matter or appeal to the Minister for Communications and Information (the Minister), who may confirm, modify or reverse the same. Where a reconsideration request and an appeal have been simultaneously filed, the IMDA will reconsider the matter and the appeal to the Minister will be deemed withdrawn.

Under section 68 of the Info-communications Media Development Authority Act 2016 (the IMDA Act), any person aggrieved by any act, direction or decision of the IMDA under Part 7 of the IMDA Act or anything contained in a code of practice may appeal to the Minister, who may confirm, vary or reverse the same. Under section 59 of the Broadcasting Act 1994 (the Broadcasting Act), any licensee aggrieved by any decision of the IMDA in its discretion under the Broadcasting Act, or anything contained in any code of practice or direction issued by the IMDA, may appeal to the Minister, who may confirm, vary or reverse the decision or direction, or amend the code of practice.

An aggrieved person who has unsuccessfully appealed to the Minister may also be able to mount a further challenge by commencing an action for judicial review in the courts.

Law stated - 19 May 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

Prior to 2 May 2022, competition and market-related matters in the telecoms and media sectors were governed separately by two different codes of practice, namely, the Code of Practice for Competition in the Provision of Telecommunication Services 2012 (TCC) and the Code of Practice for Market Conduct in the Provision of Media Services (MCC).

In line with the IMDA's role as a converged regulator, and against the backdrop of rapid convergence in the telecommunication and media landscapes, the IMDA undertook a comprehensive review of the separate codes of practice governing the telecommunication and media markets, with the aim of merging the two frameworks and develop a harmonised converged competition code for both markets, to ensure that the competition framework for both markets remains relevant.

On 18 April 2022, the IMDA issued the Converged Code, which took effect on 2 May 2022, to govern competition and market-related matters in both the telecoms and media markets, which has superseded the TCC and the MCC, respectively.

It is expected that there will be updates to existing guidelines such as the Telecom Consolidation and Tender Offer Guidelines and the Reclassification and Exemption Guidelines, as they are to be brought into alignment with the Converged Code.

Law stated - 19 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The basic regulatory framework for the communications sector is set out in the Telecommunications Business Act (TBA) and the Radio Waves Act (RWA). The Ministry of Science and ICT (MSIT) and the Korea Communications Commission (KCC) are the main regulatory bodies responsible for enforcing these regulations.

The requirements for entry into and withdrawal from a telecommunications business are set out in the TBA, and if any telecommunications carrier constructs a network using radio equipment, it must also comply with the requirements set out in the RWA.

Under the TBA, there are two types of telecommunications services.

- Core telecommunications services (CTS) are services relating to the transmission of sound, images or other data in an unmodified manner either by using the service provider's own network or by leasing a third party's network. This includes internet connectivity, as well as mobile and landline phones and voice over internet protocols (VoIP); and
- Value-added telecommunications services (VATS) are online services using the CTS network, including internet-based services, such as cloud computing services, email, e-commerce platforms and internet search engines.

Foreign ownership restrictions under the TBA apply only to CTS providers in possession of their own networks. Generally, only up to 49 per cent of foreign ownership is permitted for such CTS providers. Foreign ownership restrictions apply not only when a foreign investor directly acquires shares of CTS providers (direct ownership), but also when a foreign investor establishes a South Korean subsidiary and acquires the shares of CTS providers through such subsidiary (indirect ownership). But the restrictions on the latter are exempted for a corporation established by a foreign investor that is incorporated in a country that has entered into a free trade agreement with South Korea and partially exempted for a foreign investor that is incorporated in an OECD member country (in this case, the foreign ownership restriction still applies for acquisition of shares of certain CTS providers, such as those that own critical telecom facilities used for the national security or satellite operation).

In the mergers and acquisitions context, under the TBA, CTS providers may, depending on their annual revenue for the previous year, have to obtain prior approval from the MSIT, or at least file a report with the MSIT, if they are the subject of a merger or an acquisition.

Law stated - 22 April 2025

Authorisation/licensing regime

2 Describe the authorisation or licensing regime.

The relevant authorisation and licensing regimes are set out in the TBA.

Under the TBA, CTS providers must register with the MSIT. To obtain a licence to provide CTS, it is necessary to undergo an examination procedure and CTS providers must demonstrate that they meet the minimum capital and technical staff requirements specified under the TBA. Businesses that are not mainly engaged in telecommunications services, but engage in sales of goods or services that incorporate telecommunications-enabled components under their own name, such as vehicles with certain built-in telecommunications services, are not required to obtain any licences or registrations, but are required to file a report with the MSIT as a CTS provider.

Unlike CTS providers, VATS providers must submit only a report to the MSIT. The reporting process usually takes a few days and is generally considered a mere formality. Additionally, VATS providers with capital of less than 100 million won are exempt from the reporting requirement. An exception to this exemption is the peer-to-peer service providers and text messenger service providers that use a CTS network. These businesses must register with the MSIT, even though they are, strictly speaking, VATS providers.

Furthermore, the same authority applies the same requirements regardless of the means of communication (fixed, mobile or satellite) or the particular technology applied (eg, 2G, 3G or 4G in the mobile communication context). However, any telecommunications service provider using radio waves (eg, for mobile or satellite services) must also comply with additional requirements under the RWA to be allocated specific radio frequencies for its business.

No fees are payable concerning any authorisation or licence obtained under the TBA.

Law stated - 22 April 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

The MSIT regulates the use of radio spectrum in Korea and the relevant MSIT licence generally specifies the permitted use. A spectrum licence may be transferred or sub-licensed from three years after the original date of issuance. The transferee or sub-licensee must satisfy all the requirements applicable to the original licence holder and obtain prior approval from the MSIT.

Law stated - 22 April 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Telecommunications service providers must not discriminate in providing their services unless justified. Telecommunications service providers are required to file a report with the

MSIT on their business status, facilities, users, etc, to demonstrate the transparency of their business.

Additionally, CTS providers with a certain revenue level are required to keep separate accounts for their telecommunications business and non-telecommunications businesses and, in relation to CTS and VATS, to clearly identify the assets, expenses and profits of each category.

Furthermore, CTS providers with a certain revenue threshold must file a report with the MSIT on the terms and conditions they offer to customers. If the report is incomplete or only partial documents are submitted, the MSIT may issue a supplementary order. Moreover, the MSIT reserves the right to reject reports from CTS providers that the MSIT has identified as having a dominant position in the market if their terms and conditions are likely to harm users' interests or impede fair competition. Additionally, following the amendment of the TBA on 30 January 2024, terms and conditions that limit the CTS provider's liability for damages without a legitimate reason will also become grounds for rejecting the terms and conditions report as of 31 July 2024.

Law stated - 22 April 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

If the KCC determines that effective competition in a particular telecommunications market is impeded by a dominant service provider's conduct that undermines fair competition or users' interests, the KCC may, after public consultations with the MSIT, order structural or functional separation between that service provider's network and service activities. However, such an order for structural or functional separation is deemed an extreme measure and the KCC has not yet actually issued it so far.

Law stated - 22 April 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

Under the TBA, CTS providers (except for small-sized operators) are divided into two categories. Either they provide universal services directly or they contribute to reimburse expenses associated with the provision of universal services by other service providers.

Those service providers that provide universal services must submit a report to the MSIT on the expenses incurred while providing universal services. Subsequently, the MSIT computes the amount of contributions to be paid by those service providers who have chosen to make contributions in lieu of direct provision of universal services. The specific

amount of contribution is determined in proportion to the sales of the service provider opting to contribute.

Universal services include, among other things:

- the provision of wired phone services;
- the provision of Internet services;
- the provision of phone services for emergency calls; and
- the reduction or exemption of service charges to disabled and low-income persons for toll call services, mobile phone services and long-term evolution services.

Law stated - 22 April 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

The MSIT has the authority to establish and enforce rules on the allocation of phone numbers and mobile phone numbers. Under the TBA, phone numbers are provided to service providers based on the type of telecommunication service they provide (eg, 070 is allocated to VoIP service providers and 010 to mobile carriers).

Also, under the TBA, telephone service providers are required to support the number portability when customers switch operators, regardless of whether the numbers are assigned geographically or non-geographically.

Law stated - 22 April 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Yes. Under the TBA, CTS providers with a certain revenue threshold must file a report with the MSIT on the terms and conditions they offer to customers. If the report is incomplete or only partial documents are submitted, the MSIT may issue a supplementary order. Moreover, the MSIT reserves the right to reject reports from CTS providers that the MSIT has identified as having a dominant position in the market if their terms and conditions are likely to harm users' interests or impede fair competition. For instance, if a CTS service provider, through its terms and conditions, offers service fees that are unreasonably high compared to other similar service providers, such terms and conditions of that service provider are likely to be rejected. Additionally, following the amendment of the TBA on 30 January 2024, terms and conditions that limit the CTS provider's liability for damages without a legitimate reason will also become grounds for rejecting the terms and conditions report as of 31 July 2024. Currently, it is unclear what constitutes the legitimate reason, and it is necessary to monitor future regulatory stances. Furthermore, the Act on the Regulation

of Terms and Conditions, which prescribes general rules regarding terms and conditions to prevent unfair trade practices, concurrently applies to terms and conditions specific to the communications sector.

Law stated - 22 April 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

In principle, the TBA prohibits telecommunications service providers from imposing unreasonable or discriminatory conditions or limitations on a lease or a connection to their telecom facilities.

Furthermore, the MSIT restricts, through its guidelines, telecommunications service providers from imposing unreasonable or discriminatory conditions or limitations on a lease or in connection with their telecommunications facilities. The MSIT's guideline states that internet access service providers must not unreasonably discriminate against lawful traffic based on the type of content, applications, services, or their providers.

Also, under the TBA, large-scale VATS providers (as determined by the user numbers and traffic volume) are required to maintain network quality, such as by optimising traffic routes if it is expected that there will be an increase in traffic volume that may lead to a significant impact on providing stable telecommunications services. As the TBA was amended on 29 December 2023 and has been effective since 1 January 2024, CTS providers also are required to maintain network quality, and large-scale CTS providers (as determined by user numbers and network volume) must take technical and administrative measures to ensure the network quality, such as traffic load balancing and publish a report on the stability of their telecommunications services.

Law stated - 22 April 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

Digital platforms are categorised as VATS under the TBA. The data protection aspects of digital platforms, together with their user-facing requirements, such as the information disclosures and terms of use, are regulated primarily by the Personal Information Protection Act (PIPA). The Act on the Promotion of Information and Communications Network Utilisation and Information Protection (IT Network Act) also regulates digital platforms to a certain extent.

Under the TBA, to commence service, VATS providers must first file a report with the MSIT, which must include a schematic diagram of the telecoms network to be used, a

detailed description of user protection measures and details of technical measures in place to prevent online copyright infringement. VATS providers with a capital of less than 100 million won, however, are exempt from these reporting obligations. A VATS provider must commence business within one year from the filing date and implement technical measures to protect minors and prevent viruses and malicious codes. The TBA authorises the MSIT to investigate VATS providers, during which it may request the providers to submit any documents necessary to prove compliance with these requirements.

The PIPA and the IT Network Act regulate digital platforms over various issues, including data protection, user protection, such as protecting minors and preventing illegal content, and the security of IT networks.

There have been various efforts to enhance the regulation of online platforms, as illustrated by the draft legislation proposed by multiple members of the National Assembly, as well as the Korea Fair Trade Commission, which is the competition authority of South Korea. As of April 2025, as many as 17 legislative bills were presented before the National Assembly, all of which, with a name similar to 'online platform monopolies regulation' or 'online platform transactions fairness', share similar purposes of restraining one-sided or abusive trade practices by online platforms against the vendors that use the platforms. If made into law, this sector-specific regulation will subject online platforms that meet certain revenue or transaction thresholds to a variety of requirements, such as:

- an obligation to give users prior notice when terminating a contract or restricting services;
- transparency obligations, including providing the rankings for search results and disclosing user reviews on the online platform;
- the requirement to implement a complaint-handling system; and
- an obligation to refrain from abusing their superior bargaining position.

The likelihood of legislation is unclear, as the former administration inaugurated in May 2022 has taken a more lenient regulatory enforcement approach, stressing ‘autonomous regulation’ that prioritises problem-solving mainly through communications among businesses, rather than relying on legal regulations through legislation.

In the latter half of 2024, two prominent online retailers experienced delays in settling sales payments to their sellers. The repercussions of this incident were considerable due to the significant scale of these platforms. Consequently, discussions surrounding the introduction of a dedicated law for online platforms have been revitalised. In addition, in September 2024, the Korea Fair Trade Commission announced its intention to pursue a partial amendment to the existing Monopoly Regulation and Fair Trade Act (MRFTA) instead of introducing a new, standalone law governing online platforms. Despite this alternative approach, any meaningful legislative progress has yet to be achieved.

Furthermore, recently, there have been bills submitted to the National Assembly that aim to apply the same user protection obligations currently imposed on CTS providers to VATS providers as well. These include a bill requiring large-scale (determined as user number or traffic volume) VATS providers to report their terms and conditions to the MSIT and a bill mandating that VATS providers fulfil universal service obligations, including offering discounts to people with disabilities or low income.

Separately, TBA prohibits major app market service providers, notably Google and Apple, from coercing app developers to exclusively use certain payment systems to process in-app purchases, unfairly delaying the review of mobile content, or unfairly removing mobile content from the app market, where transactions in mobile content are hosted and mediated. In addition, app market service providers will be required to take certain end-user protection measures, such as disclosure of the terms and conditions of payment for mobile content, payment cancellation and refunds. The MSIT and the KCC have the authority to monitor app market service providers' operations, require relevant information, and impose revenue-based administrative penalties for non-compliance (which may also be concurrently subject to criminal punishment). In August 2022, the KCC initiated an official investigation against Google and Apple, which were alleged to have taken retaliatory actions against a vendor in the app market for offering an alternative payment method. In October 2023, the KCC announced a provisional plan to impose a penalty of 47.5 billion won on Google and 20.5 billion won on Apple. The final decision on these penalties was supposed to be made after consulting the opinions of the parties involved and completing internal decision-making processes. However, there has been no evidence that the KCC has implemented corrective measures or imposed the penalty on Google or Apple since the announcement.

Several lawmakers proposed an amendment to the TBA (currently pending at the National Assembly) to allow users to sideload apps from third-party app markets or websites. These bills aim to prohibit app market operators from unfairly restricting users from installing and using apps downloaded from third-party app markets or websites. The bills have been tabled before the Science, ICT, Future Planning, Broadcasting and Communications Committee, which is a standing committee within the National Assembly, and are expected to be reviewed during the extra session of the Assembly.

Law stated - 22 April 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

The Framework Act on Intelligent Informatisation (renamed in December 2020 from the 'Framework Act on National Informatisation') authorises the MSIT to, after hearing opinions from other government agencies, establish a comprehensive plan for national informatisation every three years. The plan may include plans for expanding and managing relevant infrastructure and other facilities, support for informatisation of private sectors and procurement and management of funds.

Law stated - 22 April 2025

Data protection

12 Is there a specific data protection regime applicable to the communications sector?

The PIPA serves as a primary data protection statute. Certain data protection provisions under the IT Network Act, such as restrictions on online marketing communications, also apply to the communications sector.

Under the PIPA, regulatory oversight of data protection is vested primarily with the Personal Information Protection Commission (PIPC). The PIPC is in charge of monitoring and policing compliance with the PIPA, and publishing recommended practices and privacy policy terms.

Law stated - 22 April 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

In terms of data privacy, the PIPA requires data controllers and, if applicable, their data processors to take technical and administrative measures to ensure the protection of personal data.

Such measures include requirements to:

- establish and implement an internal personal data management policy to ensure the secure processing of personal information (including the appointment of a chief privacy officer, the management, supervision and training for personnel who process personal information, and a specific plan to implement other required measures);
- install and operate access control and security measures such as firewalls or intrusion protection systems (including setting a standard for granting authorisation to the personal information database, installing and operating firewalls, and establishing a safe measure on certification measures);
- security measures including encryption, methods for secure storage and transmission of data (including one-way encryption of passwords when storing authentication information, and encryption or equivalent measures when transmitting or receiving personal information and authentication information through IT networks);
- implement measures to prevent fabrication and alteration of access log (including storage of access log and details of the processing of personal information, whenever the authorised personnel accesses the database, as well as regular inspection or backup storage);
- utilise security programmes, such as antivirus software (which should be updated automatically or at least once a day if manually);
- implement physical access control to areas where documents or storage devices that include personal information are located;
-

specify the purpose of any printing (including printing, screen displaying, or file creation) of personal information and minimise the items of information to be printed out depending on the purpose; and

- use the methods of complete physical destruction (incineration, shredding, etc), degaussing (deleting data using magnetism), reformatting, or overwriting data to prevent restoration of the data when destroying personal information.

On the information security aspect, there are a number of requirements for businesses.

For CTS providers operating in major metropolitan cities and online service providers that meet a certain revenue or user size threshold, information security management system certification is required under the IT Network Act. The certification type that is prevalently recommended is the ISMS (Information Security Management System).

The IT Network Act requires all online service providers to implement a set of technical and administrative measures to ensure information security. These measures include specific requirements on formulating and operating an information security body within the business, establishing and complying with information security and incident response plans, making necessary investments in information security, monitoring networks and servers, and controlling online and on-site facilities access.

The IT Network Act further requires online service providers to designate an employee (namely, a representative, director, or head of the department in charge of information security related work within the business, based on the criteria set by the Enforcement Decree of IT Network Act) as the Chief Information Security Officer (CISO). The CISO may also perform the role of the Chief Privacy Officer (CPO) for personal data protection matters under the PIPA.

Last, the Act on the Promotion of Information Security Industry (APISI) was amended in June 2021 (effective from December 2021) to require CTS providers that own line equipment and online service providers with a certain revenue or user size to submit to the MSIT certain security related information, including the amount of investment in information security, number of persons within the business that focus on information security, and details on the CISO and the CPO. Furthermore, pursuant to the amended APISI, which came into effect on 19 October 2023, the MSIT is authorised to verify the submitted security related information and request revisions if the information differs from the facts. Additionally, a refusal or obstruction in verifying the submitted information or non-compliance with the revision requests may result in an administrative fine of up to 10 million won.

Law stated - 22 April 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

Under the PIPA, personal data, defined as 'information regarding a living individual', includes not only information that identifies or enables identification of an individual (thus, identifiable information) but also information that, while not by itself identifiable, enables identification of an individual when combined with other information. The PIPA takes this further by defining the separate case of 'pseudonymised information'.

Pseudonymised information means information that is processed in a manner that makes it impossible to attribute the data subject from the personal data without the use of (or combination with) additional information. The PIPA permits the use of pseudonymised information without the need for the individual's consent for the purposes of statistics generation, scientific research and public recordkeeping. The PIPA also allows certain expert organisations, as designated by relevant government agencies, to combine pseudonymised information that was collected by different data controllers, for the purposes mentioned above. This allows pseudonymised information to be used, even in the absence of the data subject's consent, to analyse big data to generate statistical information.

On the other hand, the PIPA has not specially defined 'anonymised information'. The PIPC's interpretation is that this information refers to information from which an individual cannot be identified by applying reasonable levels of time, expense and technology. While the definition of anonymised information does not seem to present a clear-cut distinction from pseudonymised information, for the time being, it appears that information classified as anonymised information could be used in big data analysis without being subject to restrictions under the PIPA.

Law stated - 22 April 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

In principle, South Korean data protection laws do not prescribe any data localisation requirements but there may be cases where a certain degree of data localisation is required by a sector-specific law.

For example, under the Regulation on Supervision of Electronic Financial Transactions, financial institutions headquartered in South Korea must have their data centre and disaster-recovery centre located in South Korea. Also, if financial institutions or electric financial businesses process unique identification information (namely, resident registration numbers, passport numbers, driver's licence numbers and alien registration numbers) or personal credit information regarding transaction details, creditworthiness or credit transaction capacity through cloud computing, its data processing system must be located in South Korea.

In addition, precise map data can only be transferred cross-border with the approval of the Minister of Land, Infrastructure and Transport. Also, when a medical practitioner or medical institution uses an Electronic Medical Record (EMR) system and manages or stores EMR

in places other than the medical institution, the EMR system and backup equipment must be located in South Korea.

Law stated - 22 April 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

Data privacy sector

On 4 March 2025, the PIPC announced a preliminary investigation focused on the collection and use of personal information by robot vacuum cleaners, in light of increasing sales of such Internet of Things (IoT)-based appliances. This inquiry will assess whether prominent domestic and international manufacturers comply with the PIPA in their handling of video and audio data.

Effective since 13 March 2025, the Right to Data Portability — known as the MyData scheme — will be implemented in accordance with the amended PIPA, which was revised in March 2023. Led by the PIPC, this initiative allows individuals to request the transfer of their personal data either to themselves or to third-party service providers of their choice. The initial focus will be on the healthcare and communications sectors due to their widespread impact, with plans to incorporate the energy sector by June 2026. The PIPC has also pinpointed 10 essential sectors, including transportation, education, employment, and real estate, with a vision to gradually expand the scheme to encompass additional aspects of daily life.

Telecommunications sector

On 8 November 2023, the MSIT announced a plan to ease users' burden of telecommunication costs. Accordingly, the relevant sub-plans have been announced, including the reorganisation of 5G and the expansion of the device-specific options for customers. Furthermore, the plans include various support policies for potential new telecommunication business operators, such as friendlier approaches to the frequency allocation considerations and conditions, expansion of the opening of essential facilities and policy financing.

On the other hand, as the use period of the frequency band allocated to the three major telecommunication companies ends in 2026, conflict over the calculation of the fees for the frequency allocation band is expected. In this regard, there is a movement to promote legislation that specifies the calculation criteria for frequency allocation fees and guarantees the procedure for collecting opinions of stakeholders by law, and it is expected to emerge as the most notable issue in the telecommunication sector in the near future.

AI sector

On 27 March 2024, the PIPC made a resolution to recommend improvements to six businesses that develop or distribute large-scale language models (LLM) or provide AI services based on them to improve privacy weaknesses. The committee conducted a preliminary inspection of major AI services from November 2023, and as a result, recommended the following improvement measures:

- regarding the inclusion of personal data in the published data, the provider is required to strengthen protective measures at each stage of AI service provision, to ensure that key personal identification information can be removed at least in the pre-training stage;
- where a human reviewer reviews the data input by the user, the user shall be clearly notified of the relevant facts and the accessibility to the relevant function shall be enhanced so that the user can easily remove, delete and stop using the input data; and
- to prevent and strengthen the countermeasures against personal data infringement, an inappropriate response reporting function shall be included, and a process shall be established to take prompt action when AI services and LLM vulnerabilities are discovered.

The Framework Act on the Development of Artificial Intelligence was officially promulgated on 21 January 2025, and is scheduled to take effect on 22 January 2026. This Act provides definitions for key terms such as 'AI', 'High-Impact AI' and 'AI Operators', while also imposing specific obligations on AI operators. The key provisions are outlined as follows:

- Definition of High-Impact AI (article 2(4)): High-impact AI encompasses AI systems that may have a significantly impact or pose risks to individuals' lives, physical safety or fundamental rights. The Act, along with its Enforcement Decree, specifies the categories of such systems that fall under this classification.
- Obligation to ensure AI transparency (article 31): When products or services utilise High-impact AI or generative AI, users must receive prior notice of such usage. Furthermore, for products or services produced with by generative AI, it must be clearly indicated that the content was generated by AI.
- Obligation to ensure AI Safety (article 32): AI operators of systems with cumulative computational loads exceeding a defined threshold (as established by the Enforcement Decree) are required to identify, assess, and mitigate risks throughout the AI system's lifecycle. They must also establish a comprehensive risk management system for monitoring and responding to safety incidents.
- Determination of High-Impact AI (article 33): AI operators are obliged to conduct a preliminary assessment to determine whether their AI solutions qualify as high-impact AI. If necessary, they may request a formal determination from the MSIT.
- Responsibilities of High-Impact AI Operators (article 34): Operators of high-impact AI are required to fulfil various obligations. These include establishing and implementing risk management plans, providing explanations of the key criteria for AI outputs and the nature of training data, implementing user protection measures, ensuring human oversight of AI outputs, and maintaining documentation that demonstrates compliance with safety and reliability measures.

Currently, the MSIT is convening multiple working groups to draft the Enforcement Decree and guidelines aimed at developing detailed rules in accordance with the Framework Act on the Development of Artificial Intelligence. These documents are anticipated to be finalised and published prior to the Act's implementation in January 2026.

Law stated - 22 April 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The regulatory framework for the media sector is set out within the Broadcasting Act (Broadcast Act) and the Internet Multimedia Broadcasting Services Act (IPTV Act). The IPTV Act sets out the regulations applicable to Internet Protocol Television (IPTV) operators and IPTV content providers, and the Broadcast Act sets out the regulations applicable to operators of other types of broadcasting platforms (eg, satellite broadcasting operators (SBOs), system operators (SOs), terrestrial broadcasting operators (TBOs), broadcasting related business operators such as relay broadcasting operators (ROs), signal transmission network business operators (NOs) and programme providers (PPs). Online media services are generally subject only to the Act on the Promotion of Information and Communications Network Utilisation and Information Protection (IT Network Act).

The regulatory bodies that administer the media sector are the Korea Communications Commission (KCC) and the Ministry of Science and ICT (MSIT). The KCC is in charge of regulations applicable to TBOs and PPs that provide general programming or specialised programming for news reports. The MSIT, on the other hand, is in charge of regulations applicable to SBOs, SOs, IPTV operators, ROs, NOs and other PPs, including PPs providing specialised programmes for live home shopping shows.

Law stated - 22 April 2025

Ownership restrictions

18 | Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

In general, there are four main types of ownership restrictions applicable to media services:

- ownership by a specific individual or entity (including its related persons, eg, any family members or relatives, executive officers or affiliate companies);
- ownership between broadcasting business operators;
- ownership by a conglomerate, or an entity operating a daily newspaper or news communications business (including related persons); and

- ownership by foreign entities. Details of restrictions on foreign ownership (namely, the maximum permitted percentage of the sum of foreign ownership as applied per type of operator) are as follows:
    - TBO: prohibited;
    - SO: 49 per cent;
    - SBO: 49 per cent;
    - IPTV operator: 49 per cent;
    - IPTV content provider: 20 per cent for those operating general programming or specialised programmes for news reports;
    - 49 per cent for other instances (100 per cent ownership is permitted for indirect investments through an entity owned by the government, an organisation or citizens of a foreign country that is a party to a free trade agreement with South Korea and determined and notified by the MSIT to be eligible);
    - PP: 20 per cent for those operating general programmes;
    - 10 per cent for those operating specialised programmes for news reports;
    - 49 per cent for others (100 per cent ownership is permitted for indirect investments through an entity owned by the government, an organisation or citizens of a foreign country that is a party to a free trade agreement with South Korea and determined and notified by the MSIT to be eligible);
    - RO: 20 per cent; and
    - NO: 49 per cent.

It is noteworthy, however, that to actively respond to changes in the broadcasting industry environment and bring new vitality to the paid broadcasting market, the Enforcement Decree of the Broadcast Act has been amended in 2022 to significantly ease restrictions on the concurrent ownership and operation of a broadcasting business, namely:

- the number of PPs that a TBO may concurrently own and operate has been increased;
- provisions restricting:
    - SBOs from holding shares in or concurrently operating another SBO; and
    - SOs and SBOs from holding shares in or concurrently operating PPs have been removed; and
- the market share cap for PPs has been raised to 49 per cent.

In April 2024, the government announced its plans to ease ownership restrictions applicable to media services, including but not limited to easing restrictions on conglomerate ownership of TBOs (by raising the threshold for conglomerates subject to the ownership restrictions) and removing restrictions on foreign ownership of certain media services, subject to a public interest test. However, there are currently no specific legislative amendments in progress. In turn, it is necessary to keep monitoring regulatory developments and prospective legislative amendments.

Law stated - 22 April 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Approval and registration requirements

The licensing requirements are set out in the Broadcast Act (for TBOs, SOs, SBOs and PPs) and the IPTV Act (for IPTV operators and IPTV content providers).

Under licensing requirements in the Broadcast Act and the IPTV Act, TBOs must obtain prior approval from the KCC to engage in terrestrial broadcasting activities, and IPTV operators, SOs and SBOs must obtain prior approval from the MSIT concerning their relevant broadcasting activities.

A material change in the broadcasting business (eg, merger or division of the broadcasting service operator, change in broadcasting themes or zones, change in key facilities such as main transmission device, etc) requires prior approval or registration from the KCC or the MSIT, as applicable. However, in the case of an intra-affiliate merger involving SOs, SBOs and IPTV operators, submission of a report to the MSIT in lieu of obtaining a prior approval will suffice.

Starting from 23 April 2025, PPs involved in television broadcasting must register with the MSIT. However, for those PPs that offer television broadcasting allowing viewers to select specific programmes at designated times, submitting a report to the MSIT will be sufficient instead of registration. Additionally, PPs engaged in radio broadcasting and data broadcasting are also required to report to the MSIT. However, any PP engaged in general programming or specialised programming of news reports must obtain prior approval from the KCC. Any PP that engages in specialised programming for live home shopping shows must obtain prior approval from the MSIT.

For IPTV content providers, those engaging in specialised news reporting or general programming must obtain prior approval from the KCC, and those engaging in specialised programming for live home shopping shows must obtain prior approval from the MSIT. These approval requirements relating to the service provider's capacity as an IPTV content provider do not apply to VATS providers, TBOs and PPs, and for SOs and SBOs, the exemption from the approval requirements is granted in a limited scope for the case the content produced by an SO or SBO is aired via the channels that SO or SBO operates.

Reporting on technology combined services

Through a recent amendment to the Broadcast Act and IPTV Act, should any TBO, SO, SBO or IPTV operator intend to operate its service through a combination of broadcast transmission methods between:

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terrestrial broadcasting service, CATV broadcasting service and satellite broadcasting service; or

- any of the services listed in (1) and IPTV service,

the regulation has been relaxed to allow SOs, SBOs, and IPTV content providers to engage in such combined business by submitting a report to the MSIT, while TBOs are required to report to the KCC (in the past, prior approval was required).

Reporting on terms and conditions of use of pay television

Likewise, the regulation has been relaxed so that pay television service operators (namely, SOs, SBOs and IPTV operators) are required to merely report (namely, in lieu of prior approval) their service terms and conditions to the MSIT. An exception is for the terms and conditions stipulating rates of:

- the least expensive service provided by the relevant pay television service operator; or
- the combined service of pay television and core telecommunications service, which will still require prior approval of the MSIT.

Collection of charges

All broadcasting operators must make financial contributions to a broadcasting communications development fund on an annual basis. In determining the collection rates for these charges, the public nature of the broadcasting operation, the status of competition in the broadcasting market, the scale of profit and the financial condition of the relevant business entity are to be taken into consideration comprehensively.

Time frame for necessary authorisations

In terms of the timeframe, depending on the nature of the application, the MSIT or the KCC has 30, 60 or 90 days to process an application. However, as the lapse of time for these periods may be interrupted by requests for additional information or supplementation, in practice the application process can take significantly longer.

Law stated - 22 April 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

The Broadcast Act, the Enforcement Decree of the Broadcast Act and the Notice on organising broadcasting programmes set forth obligations for broadcast operators to allocate minimum airtime to domestically produced programme content. The minimum airtime is highest for TBOs, followed by SOs and SBOs, and lowest for PPs. This

requirement does not apply to operators of other types of media (eg, online or mobile content, as they are not considered broadcasting services under South Korean law).

Law stated - 22 April 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Under the Broadcast Act, broadcast media commercials in South Korea are largely divided into:

- programme commercials arranged directly before or after a particular programme;
- commercial breaks arranged in the middle of a particular programme;
- spot commercials arranged between programmes; and
- other types of commercials (eg, commercial captions, time signal commercials, virtual commercials, product placement).

The total advertising time for a television or radio programme cannot exceed 20 per cent of the total airtime of that programme (defined as the time period from when the start of the programme is announced to when the start of the next programme is announced). In addition, the average of the proportion of commercials for each programme that is aired in one day shall be 17 per cent or lower for any particular channel. There are also limitations on the number of commercial breaks depending on the total airtime of a programme, the size and placement of commercial captions, virtual commercials and product placement.

In addition, as a bottom rule, all broadcast media advertising must clearly distinguish advertising content from programme content to avoid any audience confusion. In particular, for any broadcast media advertising placed directly before or after any programme mainly viewed by children under the age of 13 or spot commercials between such programme, the advertising must display on the screen a caption stating ‘commercial’ to allow children to distinguish between advertising content and programme content.

Aside from the Broadcast Act, laws governing broadcast media advertising also include the Youth Protection Act and the Act on Fair Labelling and Advertising. Broadcast media advertising of regulated products such as alcohol or tobacco is subject to additional restrictions under separate laws.

Online advertising is regulated under the IT Network Act and treated differently from broadcast media advertising. Unlike broadcast media advertising, the content of which is subject to precise regulatory criteria (eg, fairness, objectiveness, profanity and effect), online advertising content is currently regulated merely as media content, and thus, is subject to a lenient general standard of whether it is illegal or otherwise against social norms or social order. There are currently no particular time limits for online advertising. However, even in the case of online advertising, advertising of regulated products such as alcohol or tobacco is subject to restrictions under applicable laws and regulations.

Law stated - 22 April 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Under the Broadcast Act, the Enforcement Decree of the Broadcast Act and the IPTV Act, SOs, SBOs (excluding SBOs engaging in digital multimedia broadcasting) and IPTV operators must offer as part of their basic package offerings public interest channels, religious channels and channels for the welfare of persons with disabilities as designated by the KCC. In addition, these operators are legally required to include specialised programming for news reports channels and retransmit certain TBO broadcasts, namely, the Korean Broadcasting System 1 channel and the Educational Broadcasting System channel. Last, SOs must also carry at least one regional channel that produces, arranges and transmits local information, broadcast programme guides and public announcements. Fee arrangements for transmission or retransmission will be negotiated between the relevant operators.

Moreover, prior approval from the MSIT is required for:

- an SO or an RO's retransmission of terrestrial broadcasts of a TBO that is licensed outside of the SO or RO's broadcasting zone; or
- an SBO's retransmission of terrestrial broadcasts outside of the TBO's broadcasting zone.

Law stated - 22 April 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

Although the dichotomy between new media and traditional broadcast media is gradually fading, TBOs are still required under the Broadcast Act to abide by higher standards relating to publicity and public interest compared to other broadcasting operators. The Broadcasting Communication Deliberation Committee, which regulates programmes and media advertising, also applies stricter standards to broadcasts by TBOs.

Law stated - 22 April 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

Only TBOs and SOs traditionally provided analogue broadcasting. TBOs completed the switchover to digital broadcasting on 31 December 2012. The 700MHz band frequency previously used by TBOs for analogue broadcasting has been reallocated to the public disaster broadcasting system and ultra-high-definition broadcasting. After SOs terminated the provision of their analogue services on 28 February 2022, analogue services have been completely terminated in South Korea.

Law stated - 22 April 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

The MSIT's spectrum allocation system restricts broadcasters' use of their spectrums. The MSIT participates in the KCC's evaluation for the issuance or renewal of a TBO licence by examining whether specific spectrums can be assigned for that TBO within the range of spectrum allocated for broadcasters. Following the recent digital switchover of TBOs, some of the resulting vacant spectrum range was assigned to TBOs' ultra-high-definition broadcasting.

Law stated - 22 April 2025

Media plurality

26 | Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

A broadcasting business operator and its related persons cannot have a combined audience share (referring to the percentage of hours tuned to a specific broadcasting channel, out of total viewing hours of total television broadcasting) above 30 per cent. If this 30 per cent threshold is exceeded, the KCC may issue an order for corrective measures, such as a restriction on holding a broadcasting business, restrictions on commercial airtime or a partial transfer of broadcasting hours.

Law stated - 22 April 2025

Key trends and expected changes

27 | Provide a summary of key emerging trends and hot topics in media regulation in your country.

Overall, when it comes to the media sector specifically, the general trend appears to be deregulation.

According to the KCC's annual plans and key policy tasks announced on 14 January 2025, the KCC plans to:

- drive digital and media innovation growth by:
- promoting legislation of an integrated media framework act to improve regulatory consistency between new and traditional media;
- supporting domestic contents and over-the-top platforms' overseas expansion; and
- relaxing existing regulations on the licence period, ownership, broadcasting programming, etc;
- increase media accountability by:
- advocating for an online user protection Act to safeguard users and prevent harm;
- preparing comprehensive measures to counter false and manipulated information;
- ensuring non-discriminative access to media by marginalised groups; and
- enhancing disaster broadcasting operating systems, etc; and
- strengthen regulatory protection afforded to digital users and establish guidelines and rules for the digital and media space.

Law stated - 22 April 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The agencies with regulatory authority over the communications and media (broadcasting) sectors are the Ministry of Science and ICT (MSIT) and the Korea Communications Commission (KCC).

Communications sector

- The MSIT is in charge of supervising the communications business (the Telecommunications Business Act (TBA), the Act on the Promotion of Information and Communications Network Utilisation and Information Protection, and the Protection of Communications Secrets Act).
- The KCC is a competent agency with jurisdiction over the prevention of IFM circulation on the internet and authority to investigate and sanction communications operators' violations of the TBA and to formulate and implement policies to protect communications service users.

Broadcasting sector

- The MSIT is in charge of licensing satellite broadcasting operators (SBOs), system operators (SOs), relay broadcasting operators, programme providers (PPs) (excluding PPs engaging in general programming or specialised programming of news reports), electric signboard broadcasting operators, CATV music broadcasting operators and signal transmission network business operators (NOs) under the Broadcasting Act, and Internet Protocol Television (IPTV) operators and IPTV content providers (excluding IPTV content providers focused on news reporting or general programming) under the IPTV Act.
- The KCC is in charge of licensing TBOs, PPs operating general programming or specialised programmes for news reports, and supervising the broadcasting industry.

Antitrust and competition sector

Separate from the regulatory bodies regulating communications and broadcasting sectors, the Korea Fair Trade Commission (KFTC) regulates antitrust matters and enforces the Monopoly Regulation and Fair Trade Act (MRFTA). Once the KCC issues corrective measures or imposes administrative penalties upon communications operators and broadcasting operators on grounds of engaging in acts prohibited under the TBA or the Broadcasting Act, the KFTC is not allowed to issue corrective measures or impose administrative penalties under the MRFTA based on the same cause of action. Nevertheless, the KFTC tends to attempt to pursue enforcement in the broadcasting sector under the MRFTA by conducting its own investigation as it is an independent agency. On the other hand, concerning any violation of regulations by IPTV operators, the KCC may impose administrative penalties upon those IPTV operators only after consulting with the KFTC.

There is no statutory mechanism to avoid conflicting jurisdiction or ensure consistency in regulatory enforcement. When such conflict arises, it is generally addressed through discourse and cooperation among the relevant authorities.

Law stated - 22 April 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

Under the Administrative Appeals Act, the Administrative Litigation Act and the subordinate regulations thereof, a decision by an administrative agency may be challenged through:

- the Central Administrative Appeals Commission in the case of dispositions, sanctions and other actions (eg, corrective orders) taken by the MSIT, including, for example, the refusal of a permit; and
-

an Administrative Appeals Commission established under the KCC in the case of dispositions, sanctions and other actions (eg, corrective orders) by the KCC.

In addition to such administrative agency level appeals or in lieu thereof, an administrative lawsuit (and injunction, if applicable) may be filed at the competent Korean Administrative Court in respect of the action or omission by the MSIT or the KCC. After deliberation of the lawsuit on the merits, the competent Administrative Court will then render a decision for the first instance. The lawsuits may be escalated for the second and third instance if either the subject or the relevant regulator appeals.

Law stated - 22 April 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

In early January 2025, the KFTC announced its commitment to operate under the guiding principle of 'forming fair trade foundations for the recovery of the civil economy and preparation of the future'. In alignment with this mission, the KFTC identified four key objectives, one which focuses on 'promoting innovative competition to prepare for the future'. The Commission emphasised its intention to enhance fair competition, particularly within the platform market. To achieve this objective, the KFTC plans to scrutinise various sectors, including advertising, operating systems (OS), video clips, social networking services (SNS), search engines, and intermediary services. Furthermore, the KFTC indicated its intention to review the legality of refund policies pertaining to subscription services, including OTT (over-the-top) platforms.

Significant developments in merger and antitrust activities in the communications and media sectors include the Sinsegae Group's affiliate, which applied for permission to acquire a 50 per cent stake in the affiliate of the Alibaba Group that owns 100 per cent of AliExpress Korea as of late January 2025. As of mid-March 2025, this acquisition is still pending approval. The review process has been ongoing for over a year, with the KFTC requesting additional documentation from the registrants. In early March 2025, the KFTC approved Samsung Electronics' registration to acquire shares in Rainbow Robotics, a commercial robot producer, establishing itself as the largest shareholder.

In terms of recent sanctions by the KFTC within the traditional communications sector, the Commission imposed penalty surcharges on the three major mobile communications companies – SK Telecom, KT, and LG Uplus – for their cartel activities that took place from late 2015 to 2022. The sanctions were a result of their collusion to limit subscriber acquisition amongst themselves.

Recent investigations and sanctions by the KFTC in the digital and new industry sectors, specifically concerning e-commerce platforms, included the following actions.

- Unfair trade practices of e-commerce platform (August 2024): The KFTC issued a corrective order and a penalty surcharge against Coupang for manipulating its algorithm to prioritise its own products in consumer searches and for allowing employees to post favourable product reviews on the platform (Coupang). Coupang

has since appealed the disposition, and the case is currently under review by an administrative court as of April 2025.

- Unfair terms and conditions of e-commerce platform businesses (November 2024): Terms were revised to ensure legal compliance (AliExpress, Temu).
- Lack of clarity in statutory requirements on a used goods e-commerce platform (March 2025): A corrective order was issued, accompanied by an administrative fine (Danggeun Market).
- Deceptive advertisements by e-commerce platform businesses (July and October 2024, March and April 2025): A corrective order and penalty surcharges were imposed (EduWill, Booking.com, Kakao Entertainment, Must-It, Trenbe, Balaan).

Initially, the KFTC was advocating for the passage of the Online Platform Competition Promotion Act to designate and regulate dominant platform operators, akin to the 'gatekeepers' concept found in the European Digital Markets Act. However, in February 2024, the KFTC announced a complete reassessment of the bill following critical feedback from the domestic platform industry. By September 2024, the KFTC decided to abandon the pursuit of an independent statute, opting instead to amend the existing MRFTA. Despite this, several National Assembly members have since submitted bills for independent legislation aimed at regulating online platforms. As of April 2025, both independent online platform bills and proposed amendments to the MRFTA are under consideration in the National Assembly, warranting ongoing monitoring of their progress and potential revisions.

Law stated - 22 April 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The telecommunications sector in Switzerland is regulated at the federal level; the main sources of law being:

- the Federal Act on Telecommunications (TCA) of 30 April 1997, with a first partial-revision introduced in 2007, as last amended on 1 September 2023; and
- the Federal Ordinance on Telecommunications Services (OTS) of 9 March 2007, as last amended on 1 January 2024.

The TCA regulates the transmission of information through telecommunications techniques, including the transmission of radio and television programme services. Its main purpose is to ensure that a range of cost-effective, high-quality telecommunications services are available in Switzerland that are competitive both on a national and international level. The OTS contains detailed rules that implement the provisions of the TCA.

Within this regulatory framework, the Federal Communications Commission (ComCom) acts as the independent licensing and market regulatory authority for the communications sector. Its main activities and competencies relate, in particular, to the granting of licences for the use of radio communication frequencies as well as the regulation of the terms of application of number portability and free choice of supplier. ComCom instructs the Federal Office of Communications (OFCOM) concerning the preparation of its business and the implementation of its decisions. Moreover, it has delegated some of its tasks to OFCOM.

Certain foreign ownership restrictions may apply. In the absence of any international commitments to the contrary, ComCom or OFCOM, as the case may be, may prohibit undertakings incorporated under foreign law from using radio frequencies or addressing resources (as defined in the TCA) in Switzerland unless reciprocal rights are granted. Under the same conditions, they can be refused to be granted a licence or can be prohibited from transferring a licence.

Law stated - 14 May 2025

Authorisation/licensing regime

2 Describe the authorisation or licensing regime.

Under the revised TCA, the general notification obligation for telecommunications service providers concerning their telecommunications services has been eliminated. Therefore, to the benefit of telecommunication service providers such as over-the-top services including Voice over Internet Protocol or Internet Protocol (VoIP) television services, the frequency spectrum may be used freely under the TCA within the limits of the applicable regulations.

Furthermore, the revised TCA provides a legal basis for frequency sharing and trading. As an exception, registration is still required where the use of certain addressing elements and radio frequencies require a licence.

Under the applicable regulatory framework, licences are still mandatory for the use of mobile radio frequencies for the provision of telecommunication services and the provision of universal services. Frequency licences are issued either by criteria competition or, more commonly, by frequency auction. Importantly, in the absence of detailed principles for the granting of mobile radio frequency licences, the authorities have considerable discretion in setting the allocation or auction rules respectively. However, the authorities have to exercise their discretion dutifully – that is, in line with the constitutional principles and the legal purpose of the TCA. Importantly, the general rules on public procurement do not apply. Licences are granted only if, having regard to the national frequency allocation plan, enough frequencies are available.

Special rules apply if the broadcaster of a radio programme service is granted a licence under the Federal Act on Radio and Television (RTVA) of 24 March 2006, as last amended on 1 October 2024.

Such licences can be acquired only by a person that has the necessary technical capacities and, if required for the use of the corresponding frequencies according to article 22, paragraph 2 lit c of the TCA, the relevant proficiency certificate. Such person must also undertake to comply with the applicable legislation, in particular, the TCA, the RTVA, their implementing provisions and the licence conditions. Depending on the kind of licence required, eligibility, documentary and procedural requirements vary. Certain foreign ownership restrictions may apply.

Applications and notifications can be submitted online via OFCOM's website.

According to the TCA, licences for radio communication and universal services are of limited duration. In 2012, licences for frequency spectrum were allocated in a public tender procedure. In early 2019, additional frequencies, particularly for the introduction of the next-generation network 5G, were auctioned. All licences are issued in a technology-neutral manner. The licences allocated in 2012 will expire at the end of 2028 and the licences allocated in 2019 will expire at the end of 2028 or 2033, respectively. The universal service licence for Swisscom was renewed from 2024 to the end of 2031.

Concerning fees, the licensing authority charges administration and licence fees for radio communication licences. No licence fee is charged on radio licences for the distribution of licenced radio and television programmes under the RTVA. Additionally, the Federal Council may exempt certain governmental and non-governmental organisations from paying the licence fee provided they do not perform telecommunications services and make rational use of the frequency spectrum.

The Federal Ordinance on Telecommunications Fees issued by the Federal Council lays down the radio licence and administrative charges in the field of telecommunications law.

The time frames for obtaining a licence or authorisation depend on the telecommunications services to be provided. If a mere registration applies without the granting of a licence, such notification can be effected via the internet within a very short period (namely, within hours).

Law stated - 14 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

Radio communication licences do specify the permitted use (eg, radio, television, amateur radio) and different rules on the trading and returning of allocated radio frequency spectrum apply. Under the TCA, frequency sharing and trading are legal, subject to the following requirements. Licences can be transferred, in whole or in part. However, such transfers require the prior consent of the licensing authority. The authority may only refuse such consent if either the licence requirements are not complied with or the efficient use of frequencies free from interference is not guaranteed. Furthermore, the licensing authority may permit exceptions from the requirement of consent for individual frequency bands if it is anticipated that the efficient use of frequencies free from interference will be guaranteed and if effective competition is neither eliminated nor seriously restricted. Advance notice must be given to the licensing authority of transfers that do not require consent.

If the licence has been granted by ComCom, the transfer rules as described previously also apply by analogy to the economic transfer of a licence, which occurs in the case of 'acquisition of control', as defined in the Federal Cartel Act.

Where holders of licences granted by ComCom make joint use of components of radio communications networks, they must give advance notice of this to ComCom and the joint use of frequencies requires its prior consent.

There is no specific regulatory framework for the assignment of unused radio spectrum. OFCOM is responsible for the management of the radio spectrum and establishes the National Frequency Allocation Plan that is approved by the Federal Council.

Law stated - 14 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

In principle, the telecommunications regulation in Switzerland is based on ex-post regulation.

Law stated - 14 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

No legal basis for a structural separation between an operator's network and service activities exists, and the introduction of such a legal basis is currently not contemplated.

Law stated - 14 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

ComCom awards one or more universal service licences to telecommunications service providers wishing to provide a universal service for the whole population in all parts of Switzerland. In principle, there is no obligation to provide a universal service. However, if no provider applies for a universal service licence, ComCom may appoint one or more providers as a universal service provider. The licence may only be transferred to a third party, whole or in part, with ComCom's approval.

Universal service licences are put out to tender and awarded based on a criteria competition. The Swiss laws on public procurement do not apply. Any person wishing to obtain a universal service licence must:

- have the necessary technical capacities;
- furnish convincing proof that the universal service can be offered, particularly concerning finance and the operation of the service for the entire duration of the licence;
- state what financial compensation will be required for doing so;
- undertake to comply with the applicable legislation, in particular, the TCA and its implementing provisions and the licence conditions; and
- undertake to comply with the applicable labour laws and guarantee customary working conditions.

For universal service licences, the Federal Council decides on quality criteria, periodically reviews the universal service catalogue, and fixes upper limits for the prices of the services of the universal service that apply uniformly for the entire licence area. The universal service criteria are determined based on market developments – that is, on new needs and technological progress.

From 1 January 2024, universal service includes:

- public telephone services, which enable national and international telephone calls to be made in real time to a number;
- an entry in the directory of the public telephone service for persons using such service, whereby households are entitled to two entries;
- an internet access service with one of the following specified transmission rates: 10 Mbit/s for downloading and 1 Mbit/s for uploading or 80 Mbit/s for downloading and 8 Mbit/s for uploading;
- services for the hearing impaired; and

- directory and operator services for the visually impaired and people with limited mobility.

To date, new technologies such as fibre optic or mobile phone services are not included in the universal service.

The universal licence services shall in principle be self-financing without any financial compensation from the state. If it is shown before the licence is granted that it will not be possible to cover the costs of the provision of the universal services in a given area even with efficient management, the licensee is entitled to financial compensation. The compensation would be financed by levying a fee on all telecommunications service providers. To date, no such compensation has been awarded.

On 15 May 2023, ComCom awarded the universal licence to Swisscom for the period 2024 to 2031 (namely, eight years).

Law stated - 14 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

The Federal Council shall issue regulations on the management of addressing resources, and, in particular, on:

- their allocation, use, blocking, transfer and withdrawal;
- the issuing of numbering plans;
- the delegation of management to third parties, the termination of the delegated activity and the supervision of the same;
- sub-allocation; and
- number portability.

The address resources shall be managed by OFCOM at the national level. It shall ensure that sufficient addressing resources are available. In doing so, it shall take account of technical developments and international harmonisation. In special cases, OFCOM may delegate the management of certain addressing resources to third parties, in principle by tender or invitation procedure. If there is good cause, it shall appoint third parties directly.

The numbering scheme under the national numbering plan allows number portability between telecommunications service providers offering the same category of telecommunications services. Within such categories, telecommunications service providers shall ensure number portability.

Telecommunications service providers that are required to ensure number portability must bear their own costs. However, a telecommunications service provider that passes a number to another can demand that the latter contributes to the administrative costs. The costs of transmitting a passed-on number to its destination are to be defined in interconnection agreements between the telecommunications service providers. If there

is no agreement, the procedural rules of interconnection apply by analogy. The new telecommunications service providers can pass part of the costs of number portability to the subscriber. To grant fast number portability, donor service providers are required to confirm number-porting applications to the recipient service providers within one working day.

The TCA regulates the management of internet domains separately. In principle, as for addressing resources in general, OFCOM shall manage internet domains if the Swiss Confederation is responsible for their management.

Law stated - 14 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

The market for end-customer prices is, in general, not subject to ex ante price regulation. However, there exist few exemptions to this rule. According to the TCA, the Federal Council shall periodically fix upper limits for the prices of the services of the universal service. In the area of international roaming, the Federal Council can issue regulations to avoid disproportionately high end-user tariffs and take measures to promote competition, inter alia, by the setting of price ceilings. The same applies to value-added services to prevent abuses. Effective from July 2021, the Federal Council has included a number of new provisions in the OTS designed to increase price transparency and consumer choice in international roaming.

Accordingly, agreements with end users are not subject to specific telecommunications regulation. However, agreements and the conclusion of such agreements must adhere to mandatory Swiss law. The starting point for any query concerning the conclusion and dissolution of a contract, as well as faults of performances, is the Swiss Code of Obligations (CO). Particularly relevant in a consumer protection context are also:

- article 8 of the Federal Act Against Unfair Competition of 19 December 1986, as last amended on 1 January 2025, which prohibits the use of abusive general terms and conditions; and
- articles 40a et seq of the CO and the Federal Consumer Credit Act, which govern the consumer's right to withdraw from a contract within 14 days under certain conditions.

Also, how prices for telecommunications services and, in particular, value-added services are announced in writing and advertising for such services are set out in the Ordinance on the Disclosure of Prices and specific provisions concerning customer data retention and security apply.

Law stated - 14 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

Within the framework of the recent TCA revision, an open internet was a central concern. Since 1 January 2021, network neutrality is regulated by law, with some exceptions.

Providers of internet access must transmit information without making any technical or economic distinction between senders, receivers, content, services, service classes, protocols, applications, programmes or terminals. They may transfer information differently only if this is necessary to:

- comply with a legal requirement or a court ruling;
- ensure the integrity or security of the network or the services provided over it or of the terminals connected to it;
- comply with an express customer request; or
- to combat temporary and exceptional network congestion; in doing so, equivalent forms of data traffic shall be treated equally.

Furthermore, in the case of special services, it is possible to design offers flexibly to meet the quality requirements of customers and as long as this does not degrade the quality of the internet connection. These are services offered in addition to the internet connection that is transmitted via the same network, for example, internet-based telephony (eg, VoIP) or television services (eg, internet-based TV).

An essential element of the fundamental net neutrality obligation is also that the corresponding providers must inform their customers and the public if they treat information differently during transmission, either technically or economically.

Law stated - 14 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

No specific legislation or regulation exists yet. Even though the Federal Council has, in principle, identified the need for clarification concerning platform regulation in the TCA revision, this issue was not specifically addressed in the revised TCA. However, on 5 April 2023, the Federal Council instructed the Federal Department of the Environment, Transport, Energy and Communications (DETEC) to prepare a consultation draft on the regulation of communication platforms. With this initiative, the Federal Council wants to strengthen the rights of users in Switzerland and demand more transparency from the platforms without limiting their positive influence on freedom of expression. The new legislation targets operators of large communication platforms (intermediaries) while ensuring that regulatory powers over content intervention remain proportional to those in the non-digital realm. Where appropriate, the new regulations shall be drawn upon the framework established by the European Union's Digital Services Act.

The consultation draft shall include the following main aspects:

- large platforms shall be required to have a point of contact and a legal representative in Switzerland;
- users whose content has been deleted or whose account has been blocked shall be able to directly ask the platform to review the measure. Additionally, a Swiss arbitration board funded by the platforms themselves shall be set up;
- to create greater transparency, platforms shall be required to indicate all advertising as such and, in the case of target group-specific advertising, publish the main parameters according to which advertisements are displayed; and
- users shall be able to easily report hate speech, depictions of violence and threatening language to the platforms. Through such report, platforms shall be required to review the reports and inform the users of the outcome.

Originally, the Federal Council wanted DETEC, with the involvement of the Federal Office of Justice, to draw up a corresponding consultation draft by the end of March 2024. This deadline was further postponed indefinitely by the Federal Council on 16 April 2025. Unless such draft is submitted for comprehensive consultation, no regulation will actually be implemented.

Law stated - 14 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

Swiss legislation on telecommunications is, as a rule, technology-neutral and does not contain any specific definitions referring to next-generation access networks. Accordingly, these are, in principle, subject to the provisions of the TCA.

There is no federal scheme to promote broadband penetration. Aside from Swiss telecommunications providers, some local authorities actively support the development of broadband networks. For example, the city of Zurich has assigned financial means to its own electric utility to build an area-wide fibre optic network and the responsible department in the canton of Grisons wants to advance the development of ultra-high broadband in its area. Furthermore, because of the rather stagnant expansion of fibre-to-the-home or high-bandwidth networks, respectively, in recent years and the considerable regional disparities of the current network coverage within and between cantons, the canton of Ticino submitted a legislative initiative at the federal level in April 2016. The initiative aims at guaranteeing dense high-speed broadband coverage throughout Switzerland and calls on the Swiss Confederation to intervene actively within the framework of its powers in those areas in which the high-speed broadband networks are not being implemented by the telecommunications service providers. In this context, direct financing or a redefinition of the universal service are being considered and proposed as instruments. The deadline for drafting a bill was extended by two years in February 2021, namely, until the summer

session of 2023. In June 2023, the deadline was further extended until the summer session of 2025. In March 2025, another extension of the deadline was applied for.

Furthermore, the holder of the universal service licence, currently the incumbent operator Swisscom, is, inter alia, obliged to provide a broadband internet connection with transmission rates of either at least 10 Mbit/s for downloading and 1 Mbit/s for uploading or 80 Mbit/s for downloading and 8 Mbit/s for uploading.

Law stated - 14 May 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

According to article 43 of the TCA, telecommunications service providers are subject to a general confidentiality obligation. Thus, they are not allowed to disclose to a third party any information relating to a subscriber's communications or provide anyone else the opportunity to do so. However, the Federal Act on the Surveillance of Post and Telecommunications and its related ordinance set out the rules and procedure concerning the interception of communications and access to consumer communications data by the competent authorities.

Subscribers must be granted access to the data on which invoices are based, in particular, the addressing resources, the times when calls were made and when payments are due. Moreover, anyone requiring this data to trace nuisance calls or unfair mass advertising must be informed of the name and address of the subscribers whose lines were used for such calls.

Under the TCA, telecommunications service providers may process customer location data only for the provision of telecommunications services and for charging purposes. The processing of data for other services requires the prior consent of customers or anonymous processing.

Also, the Federal Act on Data Protection (FADP) of 25 September 2020, as last amended on 1 April 2025, applies. The FADP aims to protect the privacy and the fundamental rights of (natural and legal) persons when their data is processed by private persons or federal bodies.

Anyone who processes personal data must not unlawfully breach the privacy of the data subjects in doing so. In particular, he or she must not process personal data in contradiction to the principles of the FADP, process data pertaining to a person against that person's express wish without justification or disclose sensitive personal data or personality profiles to third parties without justification.

The principles of the FADP are, among others, that personal data may only be processed lawfully, that its processing must be carried out in good faith and must be proportionate, that the purpose of its processing must be evident to the data subject and that personal data shall be destroyed or anonymised as soon as it is no longer required for the purpose of processing.

Law stated - 14 May 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

In 2012, the Federal Council approved the first 'National strategy for the protection of Switzerland against cyber risks' (first NCS), which specified the various risks that originate from cyberspace, identified weaknesses and described how Switzerland should proceed in this matter. The NCS is reflected in the Federal Act on the Intelligence Service, allowing the Federal Police to monitor the internet proactively.

In 2018, the Federal Council adopted the new national strategy for the protection of Switzerland against cyber risks (second NCS) for the period 2018 to 2022, containing a total of 28 measures regarding cyber risks. To support the general public and businesses against cyber risks and improve the security of its own systems, on 30 January 2019, the Federal Council decided to set up a competence centre for cybersecurity, the National Cyber Security Centre (NCSC).

In December 2019, the Federal Council approved the report 'Options for critical infrastructure reporting duties in the case of serious security incidents', which described the core issues concerning the introduction of reporting duties and possible models for their implementation. The initiated consultation ended on 14 April 2022 and revealed broad support for a reporting obligation. The Federal Council submitted a respective proposal to parliament on 2 December 2022 on mandatory reporting of cyberattacks on critical infrastructure. The legal basis for the reporting obligation was included in the new Federal Act on Information Security (ISA). To make reporting as simple as possible, the NCSC shall provide an electronic reporting form.

On 5 April 2023, the Federal Council and the cantons approved the third national strategy (third NCS). The third NCS sets out the objectives and measures by which the federal government and the cantons as well as the business community and universities shall counter cyberthreats. A steering committee shall be established to plan and coordinate the implementation of the strategy. From 2024, the NCSC was converted into a federal office and transferred from the Federal Department of Finance (FDF) to the Federal Department of Defence, Civil Protection and Sports (DDPS).

On 1 April 2025, the reporting obligation for cyberattacks on critical infrastructure entered into force. Under the new ISA, various authorities and organisations defined by the ISA such as universities, energy companies and drinking water suppliers, transportation companies or the administrations of the cantons and municipalities are obligated to report cyberattacks on their informatics resources to the NCSC. The NCSC provides interested authorities and organisations with information on whether they are subject to the reporting obligation and issues a corresponding order upon request. Also, by reporting a cyberattack, the reporting authorities and organisations are entitled to the support of the NCSC in incident management. According to the ISA, the sole purpose of the reporting obligation is to enable the NCSC to identify patterns of attack on critical infrastructures at an early stage and thus to warn potential victims and recommend suitable preventive and defensive measures to them. Under the ISA, a cyberattack must be reported, if it:

- jeopardises the functioning of the critical infrastructure concerned;
- has led to a manipulation or leakage of information;
- remained undetected for an extended period of time, in particular if there are indications that it was carried out in preparation for further cyberattacks; or
- is associated with blackmail, threats or coercion.

The report must be made within 24 hours of the cyberattack being discovered and must contain information on the reporting authority or organisation, the nature and execution of the cyberattack, its effects, the measures taken and, if known, the planned further action. The NCSC provides a secure system for the electronic reporting of cyberattacks on its platform and via email. If there are indications of a breach of the reporting obligation, the NCSC shall inform the notifiable authority or organisation and set a reasonable deadline to comply with the reporting obligation. If the reporting authority or organisation fails to comply with its duty within this period, the NCSC shall issue an order setting a new deadline and referring to the threat of prosecution. According to the Act, anyone who wilfully fails to comply with a legally binding order issued by the NCSC having regard to the threat of punishment or with the decision of an appellate body shall be punished with a fine up to 100,000 Swiss francs. To give those affected sufficient time to adjust to the new reporting obligation, the Federal Council has decided not to bring the legal basis for the fines into force until 1 October 2025. The reporting obligation will therefore apply for the first six months, but failure to report will not yet be sanctioned.

The Federal Council has also approved the new Cybersecurity Ordinance (CSO) and brought it into force on 1 April 2025. The CSO contains the implementing provisions for the reporting obligation according to the new ISA and in particular regulates the exceptions to it. Furthermore, the ordinance also contains provisions on the National Cyber Strategy, the tasks of the NCSC and the exchange of information.

Under the TCA, telecommunications providers are required to combat cyberattacks, defined exclusively as manipulations through telecommunications transmissions, such as the distribution of malicious software or the impairment of web services (distributed denial-of-service attacks). Physical access and backdoors in hardware and software are not covered. To combat cyberattacks or to protect the installations, telecommunications service providers are authorised to reroute or prevent connections and suppress information. If these precautions defeat their purpose, the Federal Council is also empowered to issue further regulations to protect the security of information and telecommunications infrastructures and services, in particular, concerning the availability and operation of installations or ensuring redundant infrastructures and the reporting of faults.

On 15 December 2023, the Federal Council adopted a report in response to a postulate aimed at mitigating geopolitical risks associated with infrastructure development, including 5G. Consequently, DETEC is tasked with drafting a revision of the TCA, aligning it with the European Union's 5G toolbox. This entails introducing a new provision empowering authorities to enact necessary measures should geopolitical risks materialise. These measures may include prohibiting the procurement, installation, and operation of equipment from suppliers posing security concerns or those under the influence of foreign states posing such risks to Switzerland.

Law stated - 14 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

The FADP and the TCA contain provisions regarding the issue of data protection. The respective provisions, in principle, also apply to big data. However, because most databases contain 'anonymised' and, therefore, theoretically not personally identifiable information as regulated in the FADP and the TCA, addressing legal issues with big data remains a legal area with many uncertainties.

The Swiss parliament adopted a total revision of the FADP on 25 September 2020. Changes, in particular, relate to the area of information, documentation and notification obligations, automated decisions and criminal penalties. The new law entered into force on 1 September 2023 and was marginally amended as of 1 April 2025.

Law stated - 14 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

The FADP aims to protect the private sphere of (natural and legal) persons regarding data processing carried out in Switzerland. Concerning the transfer of data abroad, strict obligations apply. Personal data may be disclosed abroad only if the Federal Council has decided that the legislation of the state concerned or the international body guarantees an adequate level of protection. In the absence of such a decision by the Federal Council, personal data may be disclosed abroad only if an adequate level of data protection is guaranteed by other means such as a treaty under international law; data protection clauses in an agreement between the processor and its contractual counterparty; specific guarantees drawn up by the Federal body, all of which must be given to the Federal Data Protection and Information Commissioner (FDPIC) as well as standard data protection clauses and binding corporate rules that have been approved in advance by the FDPIC or the authority responsible, respectively.

Law stated - 14 May 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

Major key trends are the growing importance of wireless internet over 5G, implementing difficulties in that regard (construction objections for new antennas threaten to reduce the value of acquired concessions) and new applications (internet of things). Other key trends are the design of and the access to the fibre infrastructure (a topic that is currently subject to judicial review from a competition-law angle), data and cybersecurity, regulation of large communications platforms as well as artificial intelligence governance.

Law stated - 14 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

In Switzerland, apart from the communications sector, regulation of the media sector is also dealt with at a federal level, the main sources of law being:

- the Federal Act on Radio and Television (RTVA) of 24 March 2006, as last amended on 1 October 2024; and
- the Federal Ordinance on Radio and Television (RTVO) of 9 March 2007, as last amended on 1 January 2024, and related decrees.

The RTVA regulates the broadcasting, processing, transmission and reception of radio and television programme services.

The broadcasting sector has three main authorities responsible for the granting of licences. The Federal Council is the licensing authority for the Swiss Broadcasting Corporation (SBC). Concerning other licences, the licensing competence has been delegated to the Federal Department of the Environment, Transport, Energy and Communications (DETEC). The Federal Office of Communications (OFCOM) puts the licences out for tender and consults interested groups.

OFCOM further fulfils all sovereign and regulatory tasks related to the telecommunications and broadcasting (radio and television) sectors. It fulfils an advisory and coordinating function for the public and policymakers. It also guarantees that basic services will be provided in all parts of the country and for all sections of the population.

The Federal Media Commission advises the Federal Council and the Federal Administration concerning media issues. It has been operational since August 2013 and currently consists of 14 representatives from various areas of the Swiss media sector.

The RTVA provides for the Independent Complaints Authority for Radio and Television. This authority deals with complaints that relate to the editorial programme and rules on disputes on denied access to a programme. Furthermore, the Complaints Authority for Radio and Television selects and supervises the ombudsman services.

As from 1 January 2025, the new Federal Act on the Protection of Minors in Film and Video Games (PMFVA) and the associated Ordinance (PMFVO) came into force in Switzerland. The PMFVA creates the legal basis for better protection of children and young people throughout Switzerland against inappropriate media content.

Law stated - 14 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Certain foreign ownership restrictions may apply. In the absence of any international commitments to the contrary, licences for broadcasting may be refused to natural persons without Swiss citizenship, to companies with foreign control or to Swiss companies with foreign participation unless reciprocal rights to Swiss citizens or Swiss companies are granted.

Also, the licence granted to broadcasters of radio and television programme services may only be transferred with prior approval of the licensing authority. The latter examines whether the licence requirements are also met after the transfer. The economic transfer of the licence (namely, the transfer of more than 20 per cent of the share capital of the voting rights or, where applicable, the participating capital of the licensee) is also deemed to constitute such a transfer.

Concerning cross-ownership, the RTVA provides that – except for the SBC – a media corporation may not receive more than two radio and two television licences. Also, the participation of the SBC in other companies that are broadcasting radio or television programmes requires the approval of DETEC.

Law stated - 14 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Broadcasters of programme services are, in principle, required to obtain a licence. However, broadcasters that request neither a share of fees nor guaranteed wireless terrestrial distribution can operate their service without a licence upon a mere prior notification to OFCOM. Also, broadcasters of programme services of minor editorial importance (eg, programme services that can only be received by fewer than 1,000 devices at the same time) do not fall under the scope of the RTVA and, hence, need neither a licence nor a registration.

The Federal Council is the licensing authority for the SBC that is subject to a special licence with an extensive mandate.

Concerning the other licences, the licensing competence has been delegated to DETEC. A broadcaster of a radio programme service that has obtained a licence under the RTVA is not required to apply separately for a licence under the Federal Act on Telecommunications

for use of the frequency spectrum. Such licence is deemed to be granted at the same time in parallel. Cable television operators are under a duty to broadcast in the respective coverage area television programme services of broadcasters that have been granted a licence. Licences are awarded by way of public tender. To be awarded a licence, the applicant must:

- be able to fulfil the mandate;
- possess sound financial standing;
- be transparent about its owners;
- guarantee that it complies with the applicable labour laws and customary working conditions, the applicable law and, in particular, the obligations and conditions associated with the licence;
- maintain a separation of editorial and economic activity; and
- have a residence or registered offices in Switzerland.

Except for the SBC, the number of licences a broadcaster and its group companies may acquire is limited to a maximum of two television and two radio licences. In the case of several applicants for one licence, the one that is best able to fulfil the performance mandate shall be preferred. In the case of equivalent candidates, the one that best promotes diversity of opinion and offerings shall be preferred. In practice, DETEC often deems independent applicants that do not belong to a media group that already possesses other broadcasting licences to be better suited to this criterion.

The annual fee for a broadcasting licence amounts to 0.5 per cent of the gross advertising revenue that exceeds 500,000 Swiss francs. Furthermore, administrative charges will incur concerning the radio and television licence as well as the telecommunications licence. These charges are calculated based on time spent. A reduced hourly rate applies to the granting, amending or cancelling of a licence for the broadcasting of a radio or television programme service as well as for the radio communication licence.

Law stated - 14 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

Like all programmes, foreign-produced programmes must comply with the minimum requirements for programme service content. In particular, to respect the fundamental rights, they must respect human dignity and be neither discriminatory nor contribute to racial hatred, endanger public morals or glorify or trivialise violence.

Furthermore, the Federal Council is authorised to require television broadcasters, ensuring practical feasibility and adequate resources, to dedicate a significant portion of their airtime to Swiss and other European productions. Alternatively, broadcasters may allocate a proportionate share of airtime or programming expenses to broadcast Swiss and European productions produced by independent producers.

From 1 January 2024, the Federal Act on Film Production and Film Culture of 14 December 2001 (Film Act) obliges all audiovisual services providing film content (private broadcasters, foreign broadcasters with publicity windows to Switzerland, TVOD and SVOD platforms as well as telecom services) to allocate a portion of their revenues to independent Swiss film production.

In addition, broadcasters may be granted a licence for national and language region-specific programmes. These licences may contain obligations concerning the portion of own productions and Swiss productions, in particular, Swiss films.

Local and regional providers of radio and television programme services must primarily consider the particular characteristics of their service area. They must contribute to the forming of opinions on topics of local and regional social life and the promotion of cultural life in the service area. Therefore, the respective licences contain specific obligations regarding local and regional content. Traditional online as well as traditional mobile content providers are in principle not subject to this regime.

Law stated - 14 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Swiss law provides for both rules on advertising in general and specific rules for advertising in broadcast media.

The Federal Act Against Unfair Competition (UCA) of 19 December 1986, as last amended on 1 January 2025, contains several general provisions on advertising. It provides, in particular, that any advertisement that is deceptive or in any other way infringes the principle of good faith and affects the relationship between competitors or between suppliers and customers is deemed unlawful. Also, the advertisement industry has installed soft law rules and established the Commission on Integrity in Commercial Communication. Such commission is a respected monitoring organisation that handles complaints from both consumers and competitors. It bases its decision on its own guidelines.

In addition to these general regulations, broadcast media advertising (form and content) is subject to the specific sector regulation as provided in the RTVA and the RTVO.

Regarding the form of advertising, it must be clearly separated from the editorial programmes and clearly identifiable as such. In particular, both the beginning and end of an advertising slot must be indicated by a clear visual or acoustic marker. An advertisement that lasts longer than a minute must be clearly identified as such for reasons of transparency.

While surreptitious advertising is always illegal, product placement may be allowed if it fits into the dramaturgy of a programme and is clearly declared as sponsorship.

The broadcasters' regular editorial employees are prohibited from appearing in advertising programmes. Local and regional broadcasters with limited financial resources are exempt from this restriction.

Furthermore, there are scheduling and airtime restrictions for radio and television advertising. Depending on the type of programme (eg, cinematographic film, documentaries, news programmes, programmes with religious content, series or children's programmes), different scheduling restrictions apply. Stricter restrictions apply to the SBC. As regards advertising transmission time, advertising, in general, may not account for more than 20 per cent (namely, 12 minutes) of one hour's transmission time, subject to exemptions for non-licensed radio programme services and non-licensed television programme services that cannot be received outside of Switzerland.

The RTVO contains provisions on the use of new forms of advertising such as split-screen, interactive and virtual advertising (namely, the insertion of advertisements into an existing image through post-production).

In terms of content, the RTVA prohibits advertising for certain groups of products and services on radio and television, including tobacco products and electronic cigarettes as well as objects that form a functional unit with a tobacco product, certain alcoholic beverages, therapeutic products and political parties. Advertising is also prohibited if it disparages religious or political beliefs, is misleading or unfair or encourages behaviour that is detrimental to health, the environment or personal safety. Less restrictive rules apply to private broadcasters, in particular, concerning commercial breaks and product placement.

There is no specific regulation for online advertising as traditional online content is, in principle, not covered by the RTVA. Therefore, subject to certain exceptions, online advertising is only subject to the general advertising rules of the UCA.

Law stated - 14 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Concerning must-carry obligations, the RTVA distinguishes between broadcasting distribution networks that transmit content via wireless terrestrial broadcasting and wire.

In the case of wireless terrestrial broadcasting, the programme services of the SBC and the programme services of broadcasters that hold a licence with a performance mandate are entitled to access the network. Broadcasters pay the owner of a radio communication licence a cost-based compensation for the broadcasting.

In the case of transmission by wire, in addition to the above-mentioned programme services, the Federal Council has defined the programme services of foreign broadcasters that are to be transmitted by wire because of their special contribution to education, cultural development or free formation of opinion. In addition, OFCOM may, at the request of a broadcaster and under certain conditions, require a telecommunications service provider for a certain period to provide broadcasting by wire of a programme service within a specific area. The RTVO provides for a maximum number of programme services to be broadcast free of charge by wire.

Law stated - 14 May 2025

Regulation of new media content

23 | Is new media content and its delivery regulated differently from traditional broadcast media? How?

No specific rules or regulations exist concerning the provision of traditional online content (websites, newsgroups and blogs, etc). However, general laws such as the UCA, the Federal Criminal Code and the laws that protect intellectual property rights, etc, apply. Online content that meets the legal definition of a programme service (namely, content that is delivered as a continuous sequence of broadcasts that are transmitted at certain times only and addressed to the general public such as Internet Protocol television and streaming media) is, in principle, covered by the RTVA, apart from offerings of minor editorial importance (namely, programme services that can only be received simultaneously by fewer than 1,000 devices) and on-demand content that is also excluded from the RTVA. Consequently, most of today's online content is not regulated. Broadcasts that are subject to the RTVA, however, must abide by the same rules (namely, regarding advertisement) as broadcasts via traditional media. Although no licence is required, the broadcasters must inform OFCOM about their programme service.

Law stated - 14 May 2025

Digital switchover

24 | When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The distribution of radio programmes via FM in Switzerland is to be discontinued by the end of 2026 at the latest and replaced by DAB+. On 25 October 2023, the Federal Council extended the FM radio licences for the last time by two years until the end of 2026 to give radio broadcasters more time for the migration process. However, SBC radio stations were already switched off throughout Switzerland on 31 December 2024.

Law stated - 14 May 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

In Switzerland, no specific rules for digital formats exist. Digital broadcasting is subject to the general rules of Swiss law. Digital formats that meet the legal definition of a programme service (namely, content that is delivered as a continuous sequence of broadcasts that are transmitted at certain times only and addressed to the general public) are, in principle, covered by the RTVA.

Law stated - 14 May 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

Except for the SBC, the number of licences a broadcaster and its group companies may acquire is limited to a maximum of two television and two radio licences.

Also, there are measures against media concentration once a licence has been granted. However, these measures are only applicable if an undertaking abuses its dominant position. In such cases, DETEC consults the Swiss Competition Commission (COMCO). If the COMCO report ascertains that a dominant undertaking jeopardises diversity of opinion and offerings as a result of an abuse of its dominant position, DETEC may demand that the undertaking concerned:

- ensures diversity by measures such as granting broadcasting time for third parties or cooperating with other participants in the market;
- takes measures against corporate journalism, such as issuing editorial statutes to ensure editorial freedom; or
- adapts its business and organisational structure (if the other measures are clearly insufficient).

Law stated - 14 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

For some time now, Swiss media companies have faced a challenging time with declining revenues. Among others, this development has mainly been driven by online media or digitalisation, respectively. The consequences are job cuts, the merging of editorial offices and a decline in media diversity, which is particularly evident on a regional level. The covid-19 pandemic aggravated this development. Recent concentrations in the media sector in Switzerland confirm a clear trend towards consolidation in this sector. However, in the referendum held on 13 February 2022, the Swiss electorate body voted against the introduction of a federal law on a package of measures in favour of the media that should have remedied some of the identified concerns.

On 21 February 2024, the Federal Council adopted a postulate report outlining several models with short, medium and long-term options for future-oriented state media funding. The objective is to tackle the challenges faced by Swiss media amid the ongoing digital transformation. While the report primarily focuses on funding for all electronic media,

including online platforms, the Federal Council refrained from endorsing any specific option.

Another hot topic is the regulation of artificial intelligence (AI). As in other industries, AI has a fundamentally transformative impact on the media. It offers great opportunities, but also poses new challenges, for example, regarding the transparency and traceability of AI-based information and decisions. Already on 22 November 2023, the Federal Council commissioned DETEC as well as the Federal Department of Foreign Affairs (FDFA), to provide an overview of possible AI regulations. Based thereon, the Federal Council decided on 12 February 2025 to ratify the Council of Europe Convention on AI, to make the necessary amendments to Swiss law and to develop other, non-legally binding measures such as self-disclosure agreements or industry solutions. Whenever possible, the legislative amendments shall be sector-specific. The new AI regulation shall serve three objectives: reinforcing Switzerland as innovation centre, safeguarding fundamental rights (including economic freedom), and increasing public trust in AI. It is now on the Federal Department of Justice and Police (FDJP) together with DETEC and the FDFA to prepare a consultation draft by the end of 2026.

Law stated - 14 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The authorities regulating the telecommunications sector are the Federal Communications Commission (ComCom) and the Federal Office of Communications (OFCOM). ComCom is the independent licensing and market regulatory authority for the communications sector. Its main activities and competencies relate, in particular, to the granting of licences for the use of radio communication frequencies as well as the regulation of the terms of application of number portability and free choice of supplier. ComCom instructs OFCOM concerning the preparation of its business and the implementation of its decisions. OFCOM itself is part of the Federal Department of the Environment, Transport, Energy and Communications (DETEC) and acts as the supervisory authority in the communications sector. There is no strict line to draw between the competencies of OFCOM and ComCom as the latter has delegated some of its competencies to OFCOM.

The authorities regulating the media sectors are the Federal Council, DETEC and OFCOM. Furthermore, there are the Federal Media Commission with advisory tasks and the Independent Complaints Authority for Radio and Television.

Also, anticompetitive practices and mergers in the telecommunications and media sector are subject to general competition law provisions enforced by the Swiss Competition Commission (COMCO). The cases are prepared and processed by COMCO's Secretariat. In merger notification scenarios, provided that the notification thresholds of the Federal

Cartel Act are met, the notifying parties require both clearance from COMCO and approval of the transfer of mobile radio frequency licences, if any, by the licensing authority. Moreover, concerning specific questions related to the conditions of competition or the market position respectively, the telecommunications regulators are required to consult with COMCO. Thus, there is close collaboration between the authorities to avoid jurisdictional conflicts, particularly concerning issues such as reviewing price-fixing arrangements, mergers and strategic alliances as well as the behaviour of dominant market players

Law stated - 14 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

In the telecommunications and media sector, the law provides for the following appeal procedures: Decisions of ComCom, OFCOM, DETEC and COMCO as well as, to a limited extent, its interim procedural decisions, can be appealed to the Federal Administrative Tribunal (FAT). The scope of judicial reviews is extensive. An appeal can be lodged on the following grounds:

- wrongful application of the law;
- the facts established by the authorities were incomplete or wrong; or
- the decision was unreasonable (a claim that is, however, rarely invoked in practice).

Accordingly, the appeal before the FAT is a full-merits appeal on both the findings of facts and law. However, in practice, the FAT grants the previous instances a significant margin of technical discretion.

Decisions of the Independent Complaints Authority for Radio and Television can be appealed directly to the Federal Supreme Court (FSC).

The judgments of the FAT and, to a limited extent, interim procedural decisions may be challenged before the FSC based on law and procedure within 30 days of the notification of the decision and its reasoning. An exception applies to decisions of the FAT regarding publicly tendered licences and disputes regarding access based on interconnection rules. These decisions are final and binding and cannot be appealed to the FSC. In proceedings before the FSC, judicial review is limited to legal claims (namely, the flawed application of the law or a violation of fundamental rights outlined in the Swiss Federal Constitution, the European Convention on Human Rights or other international treaties). The claim that a decision was unreasonable is fully excluded and claims concerning the finding of facts are limited to cases of arbitrariness.

In addition to the possibility of a request for reconsideration from the deciding authority (no actual appeal), regarding decisions by COMCO, the parties involved may at any time during and after appeal procedures request the Federal Council to exceptionally authorise specific behaviour or to clear a blocked merger for compelling public interest reasons. To date, such authorisation has never been granted.

Law stated - 14 May 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

In previous years, COMCO has reviewed a series of concentrations in the telecommunications and media sector, most of them in phase I. In October 2020, COMCO granted unconditional clearance to the acquisition of Sunrise Communications Group Ltd by Liberty Global plc in phase I. The clearance decision mainly relied on the in-depth phase II examination of the contemplated reverse acquisition of certain Liberty Global assets including UPC Switzerland LLC by Sunrise Communications Group Ltd in the previous year. In that examination, COMCO, in particular, assessed and eventually excluded a collective dominant position of Sunrise and Swisscom.

Concerning behavioural cases, with the decision of 16 November 2020, COMCO imposed fines on several suppliers of network components for illegal price-fixing agreements when submitting offers for components used for data transmission via optical fibre by major customers.

On 7 September 2021, COMCO found that UPC (now called Sunrise) is dominant in the live broadcasting of Swiss ice hockey championship matches on pay TV and that it abused this position by refusing to broadcast these games to other TV platform operators, in particular Swisscom. UPC held extensive exclusive rights to broadcast Swiss ice hockey content on pay TV for the 2017–2018 to 2021–2022 seasons. These exclusive rights created a dominant position in this market. Consequently, COMCO obliged UPC to offer all requesting television platforms in Switzerland either the raw signal of these championship matches or the transit of the UPC Mysports programme content (containing the relevant ice hockey content) on non-discriminatory terms and sanctioned UPC with a fine of 30 million Swiss francs. In its ruling of 31 October 2023, the FAT confirmed the sanction imposed by COMCO against UPC for anti-competitive behaviour in the provision of ice hockey broadcasts. However, it reduced the amount of the sanction slightly from 30 million to 29.1 million Swiss francs. This case is currently still pending before the FSC. In a case also concerning pay TV, the FSC upheld a fine of around 72 million Swiss francs imposed on Swisscom for abuse of market power in relation to certain football and ice hockey broadcasting rights in its ruling of 23 April 2024.

With a decision dated 5 March 2024, the FSC upheld an appeal from Swisscom in a case regarding an alleged abuse of a dominant position. The dispute dated back to 2008 when Swisscom secured a contract for constructing and operating a wide area network (WAN) spanning approximately 2,300 post office locations following a public tender. On 21 September 2015, COMCO determined that Swisscom had violated the Cartel Act by exploiting its dominant market position, resulting in unfair pricing practices towards Sunrise and Swiss Post, as well as maintaining a price squeeze against Sunrise. Swisscom was initially fined nearly 8 million Swiss francs. The FAC affirmed COMCO's decision in mid-2021 while slightly reducing the fine to approximately 7.5 million Swiss francs. The FSC overturned the judgment of the FCA, thereby also nullifying the fining decision of COMCO. The FSC acknowledged Swisscom's dominant position in the relevant markets

but concluded that the company had not imposed unreasonable prices on Sunrise or Swiss Post. Consequently, the FSC determined that Swisscom's actions did not meet the threshold for coercion. In that regard, the FSC noted that the contract price was negotiated with Swiss Post and not unilaterally set by Swisscom. Furthermore, the FSC found no evidence of abusive conduct by Swisscom in the form of a margin squeeze against Sunrise.

Additionally, in recent years, the Swiss competition authorities have focused on scrutinising the fibre optic network. In December 2020, COMCO initiated an investigation to assess the legality of Swisscom's new network construction strategy, prompted by industry clarifications since February 2020 and a competitor's complaint against Swisscom. COMCO suspected Swisscom of abusing its dominant market position, as defined by article 7 of the Cartel Act, by expanding according to its new network construction strategy. Consequently, on 14 December 2020, COMCO issued precautionary measures against Swisscom, prohibiting the company from constructing its fibre-optic network in a manner that hindered third parties from accessing Layer 1 via Swisscom's access centres. These measures were affirmed by a respective ruling by the FAC on 30 September 2021 as well as by the FSC on 2 November 2022. The COMCO has yet to issue a final decision on this matter. In its decision of 25 April 2024, COMCO found that Swisscom had abused its dominant market position and ordered it to expand its fibre-optic network in such a way that alternative telecommunications service providers continue to have access to the physical network infrastructure (Layer 1 access) (ie, point-to-point (P2P) and not, as previously changed, only point-to-multipoint (P2PM)). Swisscom must convert or switch off fibre optic connections already installed and in operation in a P2MP network architecture by 31 December 2025 at the latest. Swisscom was also fined around 18.4 million Swiss francs for the infringement. This case is currently still pending before the FAT.

Regarding legislative changes, the Swiss Cartel Act is currently under partial revision. The partial revision includes, in particular, the introduction of the significant impediment of an effective competition (SIEC) test as applied, inter alia, in the European Union.

Law stated - 14 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Telecommunication businesses are under the jurisdiction of the National Communications Commission (NCC) and the Ministry of Digital Affairs (MoDA). The NCC is an independent body composed of seven members nominated by the premier and then approved by Congress. The NCC performs its function via committees, and all matters handled by the NCC are subject to the decisions made in the committee meetings. A single NCC committee member does not have the authority to exercise power or perform independently. The MoDA was established in 2022 and certain matters related to the telecommunications sector that had been under the jurisdiction of the NCC (mainly matters related to frequencies, telecommunication numbers, information security, and the obligations for universal services and equal access), were then transferred from the NCC to the MoDA.

The Telecommunications Management Act is currently the main legislation governing the telecommunications sector. Taiwan's Congress passed the Act in June 2019, and it became effective on 1 July 2020, thereby replacing the Telecommunications Act as the main telecommunications legislation in Taiwan. The Telecommunications Management Act releases the franchise and licence requirements that existed for telecommunications service providers under the Telecommunications Act. It separates telecommunication services from telecommunications networks. Further, it sets forth a registration scheme for telecommunications service providers, whereby registration is mandatory only for engaging in telecommunications services that use public telecommunications resources or have interconnections with other service providers, and that is optional for engaging in all other types of telecommunications services. The building up and operation of a public telecommunications network (namely, a telecommunications network for the provision of services to customers instead of for use by the network owner itself) by a registered telecommunications service provider or any other person is separately subject to the NCC's prior approval. A registered telecommunications service provider can utilise its own networks or those of others for its services. A public telecommunications network owner could build up said network entirely on its own or in combination with components from others.

Only Taiwanese entities may apply to the NCC to build up a public telecommunications network. A public telecommunications network that uses frequencies and telecommunications numbers may only be built by a Taiwan-incorporated company with limited liability and capital divided by issued shares. The chairman of the board of directors of such a Taiwan-incorporated company must be a Taiwanese citizen, and the company is subject to foreign investment caps, whereby the direct foreign investment in such entity may not exceed 49 per cent of its total capital and where the total of direct and indirect foreign investment cannot exceed 60 per cent of its total capital.

All of the franchises and licences granted by the NCC under the Telecommunications Act automatically became invalid on 1 July 2023. Existing public telecommunications networks built by those franchisees and licensees can apply to the NCC for network build-up

approval without going through the necessary network on-site inspection that is required for newly-established networks under the Telecommunications Management Act.

Law stated - 21 April 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

The Telecommunications Management Act sets forth a registration scheme for those entities providing telecommunications services and a separate approval requirement for the entities building up and operating public telecommunications networks. The registration is mandatory for those service providers that intend to interconnect with other providers and apply for frequency-use licences or telecommunications numbers, while all other telecommunications service providers that are not subject to mandatory registration requirements can choose whether to register or not. Almost all facility-based service providers, including fixed, all-generation mobile and satellite communication service providers, are subject to the said mandatory registration requirement. In addition, pursuant to the NCC's practices, all services providers that propose to resell/wholesale numbers (or services associated with numbers) acquired from other local fixed-line or mobile network operators (including voice over internet protocol (VoIP) service providers and Internet of Things (IoT) services providers), and submarine cable service providers, are required to register as telecommunication service providers as well; although the Telecommunications Management Act itself does not specify such a requirement. Reselling (which includes wholesale and retail sales) services that are not associated with numbers are not subject to the mandatory registration requirements.

Only registered telecommunications service providers are subject to the various obligations and compliance requirements outlined by the Telecommunications Management Act. Only local entities, including Taiwan-incorporated companies and the registered Taiwan branch offices of foreign companies, may register with the NCC as telecommunications service providers.

Separately from the telecommunications service provider registration, a registered telecommunications service provider or any person proposing to build up a public telecommunications network is subject to prior approval from the NCC. A public telecommunications network is defined as a telecommunications network established to provide services for communication to the public, where the public means any third party other than the network owner itself. As such, a telecommunications network built by an operator that provides services to corporate customers for the latter's internal communications only would still be considered a public telecommunications network, and the building up of such a network would be subject to prior approval from the NCC accordingly. The Telecommunications Management Act broadly defines a telecommunications network as a network consisting of telecommunications infrastructure that transmits and receives communication messages by way of satellite, fixed or mobile networks, or any combination of the same.

An applicant who proposes to build up a public telecommunication network in Taiwan must be a Taiwan-incorporated company or a Taiwan branch office registered by a foreign

company pursuant to Taiwan's company laws, provided that the applicant using frequencies or telecommunication numbers for its proposed public telecommunication network is limited to that incorporated as a company limited by shares pursuant to Taiwan company laws. The chairman of the board of directors of such a company limited by shares shall be a Taiwan citizen, direct foreign shareholding in such company cannot exceed 49 per cent of its total capital, and combined direct and indirect foreign shareholding in such company shall not exceed 60 per cent of its total capital. Indirect foreign shareholding means foreign shareholding via domestic corporate shareholders of such public telecommunication network operating company.

A public telecommunication network once having been completely built up, is subject to an on-site inspection by the NCC before the network can operate.

A public telecommunications network owner is not necessarily a registered telecommunications service provider, while a registered telecommunications service provider can utilise the networks it builds up itself or provided by others for the provision of its service.

Both the registration and network build-up approval are permanent and without any fixed term. There is a nominal registration fee for registering with the NCC as a telecommunications service provider that is calculated based on the paid-in capital of the service provider and the maximum fee is NT$25,000. The application fee for building up a public telecommunications network ranges from NT$12,000 to NT$1.2 million depending on the types of networks and the number of the networks to be built up, and the on-site inspection fee ranges from NT$25,000 to NT$310,000 depending on the type of network.

Spectrum used for telecommunications services are subject to separate use licences granted by the MoDA. Such use licences may only be granted for use with a specific public telecommunications network and the applicant and licensee must be an NCC-approved public telecommunications network operator.

Public Wi-Fi services that use 2.4GHz, 5.8GHz or 6GHz (5.945GHz–6.425GHz) are exempted from telecommunications service provider registration, public telecommunications network build-up approval, and spectrum-use licences.

Law stated - 21 April 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

A spectrum licence shall always be used exclusively for the specific purpose for which it was granted.

An entity with frequency allocated by the MoDA is permitted to transfer such frequency to others or share the use of such frequency with others, both of which are subject to prior approval by the MoDA.

Law stated - 21 April 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

'Ex-ante obligations' is not a term used in the Telecommunications Management Act. Nevertheless, the Telecommunications Management Act provides a regulatory scheme for ensuring effective competition within specific telecommunications service markets. The NCC is authorised by the Telecommunications Management Act to adopt control measures for significant market power (SMP), namely, the dominant market players in the service market designated by the NCC. For such market designation, the NCC shall take into consideration the following factors:

- the development of technologies and services in the market at issue;
- the importance in the overall telecommunications service market;
- the region or range of competition and the demand or supply substitutability in the service market at issue; and
- the structure of competition in the service market at issue.

The NCC subjected the following five telecommunications services markets to such regulatory scheme in April 2022:

- fixed-line voice retailing;
- fixed-line broadband retailing;
- fixed-line wholesale services;
- fixed-line call termination services; and
- mobile call termination services.

The NCC is entitled to further determine the SMPs in those markets and adopt the following control measures for such dominant market players:

- requiring those dominant market players to disclose information, conditions, procedures and expenses concerning interconnection, network access components and use of their telecommunications infrastructure;
- requiring those dominant market players to ensure the interconnection agreements that they enter into are fair, reasonable and non-discriminatory;
- requiring those dominant market players to provide other service providers with interconnection, network access components, or relevant telecommunications infrastructure, and to outline template agreements for the same for the NCC's approval;
- prohibiting those dominant market players from setting service fees that may cause a cross-subsidy price squeeze or any other abuse of power; and
- requiring those dominant market players to adopt accounting separation among the various services.

In May 2023, the NCC chose the following SMPs in five designated telecommunications service markets:

- fixed-line voice retailing: Chunghwa Telecom Co, Ltd;
- fixed-line broadband retailing: Chunghwa Telecom Co, Ltd;
- fixed-line wholesale services: Chunghwa Telecom Co, Ltd;
- fixed-line call termination services: Chunghwa Telecom Co, Ltd, Taiwan Fixed Network Co, Ltd, New Century InfoComm Tech Co, Ltd, and Asia Pacific Telecom Co, Ltd; and
- mobile call termination services: Chunghwa Telecom Co, Ltd, Taiwan Mobile Co, Ltd, Far EasTone Telecommunications Co, Ltd, Taiwan Star Telecom Corporation Limited, and Asia Pacific Telecom Co, Ltd.

Law stated - 21 April 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

The Telecommunications Management Act adopts a separation of structure and function regime and allows a telecommunications service provider to use the networks established by others but does not make structural and functional separation mandatory.

Law stated - 21 April 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

The universal service obligations currently apply to voice-based uneconomic public payphone services, voice-based telephone services in uneconomic areas, internet access services in uneconomic areas, and internet access offered to local schools and public libraries at a discount.

The MoDA is authorised by the Telecommunications Management Act to designate one or more registered telecommunications service providers to provide universal services, which are financed by a fund contributed to by those registered telecommunications service providers that have been designated by the MoDA and that contribute to the fund in amounts and manners set by the MoDA.

Law stated - 21 April 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

All telecommunications numbers, including numbering codes, subscriber numbers and identification codes, are regulated by the MoDA and the NCC in Taiwan. The numbers are allocated by the MoDA to registered telecommunications service providers via applications made under the MoDA's regulations. Numbers allocated to registered telecommunications service providers can only be used for those services for which the applicant applied. Numbers allocated by the MoDA are not tradable or transferable.

Number portability is mandatory, but the MoDA has discretion in setting the applicable time frames. Currently, mobile phone number portability, local landline number portability and 080 toll-free phone number portability, are mandatory.

Law stated - 21 April 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Only the customer terms and conditions adopted by a registered telecommunications service provider are regulated by the Telecommunications Management Act. Where customers fail to pay their telecommunications service fees on time, the registered telecommunications service providers are not allowed to suspend their service without first notifying such customers and asking them to make payment during a specified time. A registered telecommunications service provider is not liable to its customers for any damages caused by errors, delays, interruptions, suspensions, or failures in its service due to a failure or breakdown of the telecommunications network, but customers shall be offered a reduction in their service fees as compensation. The customer terms and conditions of registered telecommunications service providers designated by the NCC are subject to prior approval by the NCC.

Law stated - 21 April 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

No.

Law stated - 21 April 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

Taiwan's newly introduced anti-fraud legislation, namely the Fraud Crime Hazard Prevention Act (the Anti-fraud Act) which came into effect in July 2024, requires domestic and offshore internet platforms (ie, social media, search engine, news, education/knowledge, dating, video or otherwise) that present, post or deliver commercials within the territory of Taiwan with a quantity meeting the thresholds set forth by MoDA ('regulated internet platforms') to:

- appoint a local legal representative ('Taiwan legal representative'), which shall be either a Taiwanese citizen or entity; and
- register this appointment with Taiwan regulators if they do not have a branch office or other presence in Taiwan.

Currently, MoDA has designated Google, YouTube, Line, Facebook, Instagram and TikTok, as the regulated internet platforms and thus require the companies operating these platforms to comply with the Taiwan legal representative appointment requirement. The Taiwan legal representative is tasked with receiving notifications from regulators regarding enforcement and compliance with the Anti-Fraud Act and assisting the platform in fulfilling its obligations under the Act. Essentially, appointing a Taiwan legal representative obligates the platforms to establish a presence in Taiwan, facilitating enforcement actions by regulators. Additionally, other Taiwanese government authorities may deliver notifications or requests to the platform through its Taiwan legal representative for matters beyond the scope of the Anti-Fraud Act.

In addition to appointing a Taiwan legal representative, the regulated internet platforms are also subject to the following requirements:

- Identity verification: platforms are mandated to implement security measures to verify the identities of the advertisers and funding sources, using methods such as digital signatures or rapid identity verification mechanisms.
- Risk assessment and reporting: platforms are required to assess potential fraud risks associated with their advertising services, develop anti-fraud plans, and publish an annual transparency report. This report should include active user statistics, summaries of anti-fraud activities, and data on handling fraudulent advertisements.
- Advertisement disclosure: when publishing or promoting advertisements, platforms must clearly label them as advertisements and disclose information such as the identities of advertisers and funders, advertising permit numbers, and any use of deepfake technology or AI-generated personal images. This information should be clearly presented on the advertisement; however, if space is limited, detailed information about the advertisers and funders can be provided via a clickable link.
- Prompt action on fraudulent advertisements: if notified by judicial police or relevant regulatory authorities that an advertisement is fraudulent or clearly related to fraud, platforms must remove, restrict access to, or cease broadcasting the advertisement

or take other necessary actions within 24 hours. Furthermore, users posting fraudulent advertisements or operating fraudulent accounts must have their services suspended for a reasonable period, upon notification by the authorities.

Non-compliance with these obligations may result in administrative fines up to NT$100 million, depending on the severity of the violation. Continued non-compliance could lead to further regulatory actions, including traffic management controls, stop resolutions, and access restrictions, although the effective date for these measures has yet to be determined.

Law stated - 21 April 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

There are currently no specific regulations governing NGA networks. The Taiwanese government provided tax incentives for the adoption of 5G mobile networks that met certain qualifications, and will continue to do so until 31 December 2029.

Law stated - 21 April 2025

Data protection

12 Is there a specific data protection regime applicable to the communications sector?

The Personal Data Protection Act (PDPA) is Taiwan's main legislation governing personal data protection, and it applies to all business sectors, including the telecommunications sector. The PDPA authorises the NCC, as the regulator of telecommunications businesses, to outline regulations specifically for personal data protection matters within the telecommunications sector.

The NCC currently has a set of guidelines applicable to registered telecommunications service providers and to public telecommunications network operators that provide internet access services and that have more than 3,000 users. The said guidelines for personal data protection require that the registered telecommunications service providers and regulated public telecommunications network operators establish protocols for personal data protection in compliance with the standards set by the NCC and necessary methods after business termination.

Such guidelines also require registered telecommunications service providers and regulated public telecommunications network operators to notify the NCC of any significant personal data accident (eg, leakage) within one hour after becoming aware of such an accident and provide details (including causes, effects, damages, etc) of such an accident to the NCC within 72 hours of becoming aware of such an accident. If a significant accident is discovered and notified to a registered telecommunications service

provider or regulated public telecommunications network operator by the NCC and (or) other government authorities, such registered telecommunications service provider or regulated public telecommunications network operator shall provide details (including causes, effects, damages, etc) of such accident to the NCC within 48 hours of being so informed of such accident by the NCC and (or) other government authorities.

The NCC has also prohibited the transmission of any personal data to mainland China by Taiwan's telecommunications service franchisees and licensees (under the old Telecommunications Act) as well as registered telecommunications service providers and public telecommunications network operators (under the Telecommunications Management Act).

Law stated - 21 April 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The Cybersecurity Management Act (CSMA) is the main Taiwanese legislation addressing cybersecurity. Taiwan's general criminal laws also include specific provisions related to cybercrime. The CSMA applies not only to government bodies but also to private companies engaging in the provision of data services and core internet infrastructure operations. The CSMA mainly requires applicable government bodies and private companies to establish and implement cybersecurity plans and requires that the government be notified of cybersecurity incidents. The Telecommunications Management Act requires all public telecommunications network operators to integrate detection and protection functions into their networks that are sufficient to ensure communication security. An application for building up a public telecommunications network would need to include the applicant's communication security protection plan for the network.

Law stated - 21 April 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

No.

Law stated - 21 April 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

No. However, the NCC prohibits any Taiwanese telecommunications service franchisees and licensees (under the old Telecommunications Act) as well as registered telecommunications service providers or public telecommunications network operators (under the new Telecommunications Management Act) from transmitting any personal data that it has collected to mainland China.

Law stated - 21 April 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

Newly introduced anti-fraud legislation

According to Taiwan's anti-fraud legislation, namely the Anti-fraud Act which came into effect on July 2024, Taiwan's registered telecommunications service providers are required to implement reasonable anti-fraud measures, including implementing KYC (know-your-customer) procedures that verify user identities through government databases before providing services. If regulators notify them of fraudulent activity, the registered telecommunications service providers must cease services for user(s) engaged in fraud and no services shall be provided to the same user for a period of three years after such cessation or restriction. Roaming services are also prohibited for users of high-risk offshore providers that are not based in Taiwan.

NCC further regulates on the use of telecommunications numbers

As part of the Taiwanese government's effort to prevent telecommunications fraud pursuant to the Anti-fraud Act, the NCC established a new numbers management scheme through enacting the new Regulations Governing the Use of the Subscriber Numbers by Telecommunications Enterprises (the Numbers Regulations).

The NCC, through the interpretation of the Numbers Regulations, requires all services providers that secure numbers provided by local fixed-line or mobile network operators and re-allocate them to their own customers' usage, to register with the NCC as number resale/wholesale services providers (in the form of a telecommunications services provider registration certificate). Services providers subject to such registration requirement include VoIP services providers, IoT services providers and voice simple resale services providers.

The NCC also proposes draft amendments to the Numbers Regulations (the Draft Amendments) which further require that numbers provided by local fixed or mobile network operators to VoIP and IoT services providers must comply with Taiwan's PSTN Numbering Plan, as set forth by the MoDA and the respective operator's MoDA-approved numbers allocation application/plan. This would mean that the numbers used for VoIP services will be limited to numbers with the '070' prefix, and numbers used for IoT services will be limited to those numbers with the '040' prefix, and that local fixed or mobile network operators will be required to retract the local phone numbers (which have a prefix that is not '070')

previously provided to VoIP services providers. Given that the Draft Amendments have generated significant backlash from VoIP services providers, the NCC has postponed the legislative process of the Draft Amendments at this stage.

Law stated - 21 April 2025

MEDIA

Regulatory and institutional structure

17 Summarise the regulatory framework for the media sector in your jurisdiction.

The National Communications Commission (NCC) is also the government agency overseeing the broadcasting industry, with legislation including:

- the Radio and Television Broadcasting Law (last amended on 13 June 2018) governs terrestrial broadcasting;
- the Cable Radio and Television Broadcasting Law (last amended on 13 June 2018) governs the cable broadcasting sector; and
- the Satellite Radio and Television Broadcasting Law (last amended on 18 May 2022) governs satellite broadcasting.

Law stated - 21 April 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

The restrictions on foreign ownership for broadcasters are:

- terrestrial broadcasters: no foreign investment is allowed;
- cable broadcasters: total direct and indirect foreign investment shall be less than 60 per cent of the broadcaster's total issued shares. Direct foreign investment shall be less than 20 per cent of the total shares issued; and
- satellite broadcasters: direct foreign investment in a Taiwan-incorporated satellite broadcaster shall be less than 50 per cent of the total issued shares. An offshore satellite broadcaster may offer programmes in Taiwan by setting up a branch office or appointing a distributor, provided that the NCC has granted broadcasting approval.

There are currently no regulations specifically prohibiting or restricting cross-ownership among broadcasters. However, for cable television multiple system operators, relevant cable laws provide that a cable system operated together with its related companies and related cable system operators are prohibited from controlling more than one-third of the total number of subscribers in the country, and cable system operators shall not have

more than one-quarter of the channels available on their respective network broadcasting programming produced in-house or provided by affiliates.

Also, cross-ownership among broadcasters is subject to general competition laws.

Law stated - 21 April 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

All broadcasters broadcasting within the territory of Taiwan via closed broadcasting platforms are subject to licences issued by the NCC. Programmes and content broadcasted via open platforms, such as internet protocol television (IPTV), internet programming services and mobile content, are currently not regulated. An offshore broadcaster broadcasting into Taiwan via satellite needs to either set up a branch office in Taiwan or appoint a local distributor. An offshore satellite broadcaster licence shall be obtained by the branch office in Taiwan or the local distributor on behalf of the offshore satellite broadcaster.

The term of a licence for a terrestrial broadcaster is nine years. Such a licence is renewable upon the expiry of each nine-year period. A cable broadcasting licence is also valid for nine years. An application for renewal of a cable broadcasting licence must be filed within the six-month period following the beginning of the ninth year of the licence. The duration of the satellite broadcasting licence is six years, provided that the licence term for a local distributor of an offshore satellite broadcaster is limited to the distribution term, with a maximum of six years. An application for renewal of a satellite broadcasting licence must be filed no later than six months before the expiry of the then-applicable licence period.

No franchise fees are imposed on broadcasters. However, licensed cable broadcasters must make annual donations to a government foundation in an amount equal to 1 per cent of business turnover for that year. The subscription fees charged by a cable operator from its subscribers are subject to prior approval by the government authorities.

Law stated - 21 April 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

No regulations restrict the broadcasting of foreign programmes. Locally produced programmes must make up at least 70 per cent of total programming broadcasted by a terrestrial broadcaster. Also, at least 50 per cent of the primetime dramas broadcasted by terrestrial broadcasters must be locally produced.

Law stated - 21 April 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Advertising content must not:

- violate the law;
- jeopardise public policy or adversely affect acceptable social customs;
- adversely affect the physical or mental well-being of children or juveniles;
- incite people to commit crimes; or
- spread rumours or false information to mislead the public.

The content of advertisements for certain products and services must receive prior approval from the relevant government agencies if other applicable laws so provide. For example, advertisements for medicines, cosmetics, medical equipment and medical treatments must have the approval of the health authorities.

For terrestrial broadcasters, advertising time must not exceed 15 per cent of total broadcasting hours. For cable broadcasters or satellite broadcasters, advertising time must not exceed one-sixth of the total broadcasting time for each programme. Online advertising is not subject to the same restrictions as IPTV or internet programme services and is not yet regulated in Taiwan.

Law stated - 21 April 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

A cable broadcaster is required to simultaneously retransmit the programmes and advertisements broadcast by licensed terrestrial broadcasters by including those in the cable broadcaster's basic channel service. Cable broadcasters must retransmit such programmes and advertisements in their entirety without any changes to format and content. No fees are payable for such retransmission.

Law stated - 21 April 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

Currently, there are no specific rules for broadcasting new media content.

Law stated - 21 April 2025

Digital switchover

24 | When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

Terrestrial TV digitalisation

The digital switchover for terrestrial television broadcasting was completed on 30 June 2012. The spectrum freed up by such switchover was allocated for 4G mobile phone service franchisees.

Cable TV digitalisation

All of the networks currently operated by domestic cable broadcasters are capable of transmitting digital content. Certain cable operators have begun broadcasting in full digital. The competent authority in charge, the NCC, has adopted the following steps for promoting cable television digitalisation:

- encouraging cable system operators to provide a free set-top box to each user;
- adopting the achieved percentage of cable television digitalisation as the key evaluation point for cable system operator licence renewal;
- combining the achieved percentage of cable television digitalisation and cable television tariff policy for policy consideration;
- opening the cable television tiering system under the achieved percentage of cable television digitalisation; and
- issuing new cable broadcaster licences to only those operators that propose to broadcast in full digital.

To date, digital penetration has reached 100 per cent in Taiwan, with approximately 4.38 million digital TV users. With the rapid advancement of over-the-top (OTT) TV and online TV, the number of digital TV users has been decreasing annually.

Law stated - 21 April 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

The laws do not outline specific restrictions with the exception that the cable broadcasting laws prohibit cable broadcasters from broadcasting home shopping channels in excess of a number specified by the NCC. Also, all of the programming that a cable broadcaster intends to broadcast is subject to the NCC's general review and approval.

Law stated - 21 April 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

New media antimonopoly and divestiture legislation has been proposed by the NCC and is currently being reviewed by Congress. Such proposed legislation aims to regulate mergers or other forms of consolidation among various broadcasters and other media such as newspapers to prevent overconcentration within the media landscape. Briefly, prior approval from the NCC would be required for any merger or other consolidation among specific broadcasters and other media if, after the merger or other consolidation, the viewer ratings for the merged or consolidated broadcaster and media enterprise would meet certain thresholds and such approval would not be granted if the post-merger or post-consolidation viewer ratings would exceed still higher stipulated thresholds.

Law stated - 21 April 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

The NCC released a draft of proposed new legislation, the Digital Intermediary Service Act (DISA), in late June 2022, which aims to regulate a broad range of internet service providers, including internet access service providers, caching service providers, and data storage service providers. The DISA draft proposes to apply to digital intermediary service providers that either have a business presence in Taiwan, have a significant number of users within the territory of Taiwan or target Taiwan as a primary market.

Any offshore digital intermediary service provider that is subject to the proposed DISA but that does not have a business office within Taiwan would need to designate a local agent, who would then need to act on behalf of the offshore Digital Intermediary Service Provider as required by the DISA. Designation of a local agent would be subject to a reporting requirement with the NCC.

Following the NCC's release of the DISA draft, service providers that are to be regulated, as well as other stakeholders, civic groups, media experts and industry specialists and the civic society, expressed strong concerns about and opposition to said draft. Most concerns revolve around the impediments to free speech online and the development of the digital and online service industry. The NCC ultimately dropped the draft in early September of 2022 and currently has no plan to revisit this legislation.

The NCC also released new draft legislation to regulate offshore and domestic internet programming services (or OTT services) back in 2020 and 2021. The key points of this draft set out that:

- OTT service providers would be subject to registration requirements, which would be mandatory for the service providers specified by the NCC based on the number of subscribers, flow, business, turnover, market position and other significant public interest metrics;
- offshore OTT service providers subject to mandatory registration requirements shall appoint a local agent and then process its registration with NCC via such agent;
- registered OTT service providers are subject to various information disclosures (to the regulators and public requests);
- the content or programmes provided by registered OTT service providers are subject to grading requirements and should comply with applicable restrictions outlined by Taiwan laws; and
- registered Taiwan telecommunications service providers and public telecommunications network operators are prohibited from providing services to the OTT service providers of mainland China that have not secured prior approval from the Taiwan government to provide their programming services in Taiwan.

The draft encountered a strong backlash after being released. The NCC is considering certain changes, which are likely to be significant to the draft legislation. At present, no updated version or further information regarding the OTT TV-related legislation has been made available.

To reconcile the regulatory gaps applicable to cable television versus OTT TV, and to facilitate fair competition within the cable television industry, the NCC also announced that it expected to amend all of Taiwan's existing main broadcasting legislations (namely, the Radio and Television Broadcasting Law, the Cable Radio and Television Broadcasting Law, and the Satellite Radio and Television Broadcasting Law).

Law stated - 21 April 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The National Communications Commission (NCC) and the Ministry of Digital Affairs (MoDA) are the government agencies overseeing the telecom industry and the NCC is the regulator for the broadcasting sector. The NCC and the MoDA make policy decisions, initiate most of the telecom and broadcasting-related legislation, and have primary responsibility for the implementation and enforcement of telecom and broadcasting laws. A

separate independent regulator, the Taiwan Fair Trade Commission (TFTC), is the antitrust regulator in Taiwan. Just as for the NCC, the members of the TFTC are nominated by the premier and then approved by Congress.

The Telecommunications Management Act provides that any merger or acquisition made between or among two or more registered telecommunication service providers that have been allocated frequencies by the MoDA or where the business to be merged or transferred represents one-quarter or more share of a telecommunication service market specified by the NCC, is subject to prior approval from the MoDA (in cases where the transaction involves registered telecommunications service providers that have been allocated frequencies by the MoDA) or the NCC.

In practice, the NCC also considers any merger or acquisition between or among broadcasters to represent a change to the business plans originally submitted to the NCC by those broadcasters and, thus, any changes to such business plans would require prior approval of the NCC.

Such mergers or acquisitions in the communication and media sectors are subject to prior notification to the TFTC as well if the market thresholds stipulated by the Fair Trade Law, Taiwan's general competition law, would be met as a result of the merger or acquisition.

No specific law exists for avoiding conflicts in jurisdiction between the MoDA or NCC and the TFTC for mergers or acquisitions within the telecom and media sector. The MoDA or NCC and the TFTC have the authority to make their own respective decision on the same proposed transaction. In fact, the TFTC has outlined its own guidelines for its review of cross-sector combination transactions between or among telecommunication and broadcasting industries.

Law stated - 21 April 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

An objection to the decision by the NCC or the TFTC should be appealed to the High Administrative Court directly because the NCC's or TFTC's decision failed to comply with applicable laws. A decision by the High Administrative Court may be appealed to the Supreme Administrative Court. Any objection to a decision of the MoDA should be appealed to the Administrative Appeals Commission of the Executive Yuan (the Cabinet) if a decision of the MoDA is considered to be unlawful or improper. A decision by the Administrative Appeals Commission of the Executive Yuan may be further appealed to the High Administrative Court for judicial review. Any objection to a decision of the Administration for Digital Industries, MoDA, or of the Administration for Cyber Security, MoDA, should be appealed to the Administrative Appeals Commission of the MoDA, if their decision is considered to be unlawful or improper. A decision of the Administrative Appeals Commission of the MoDA may be appealed to the High Administrative Court. A decision of the High Administrative Court may be appealed to the Supreme Administrative Court.

Law stated - 21 April 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

On 12 March 2025, the TFTC fined Wanin International Co, Ltd (Wanin) NT$200,000 (approximately US$6,250) for failing to file a merger notification prior to acquiring one-third of the shares of Vie Show Cinemas Co, Ltd (VieShow). During its review process for Wanin's 2024 August filing, the TFTC found that Wanin had already held 35.69 per cent of VieShow's shares at the time of the filing. Further investigation revealed that Wanin had acquired more than one-third of VieShow's shares as early as 21 June 2024. Given that VieShow's market share in the film exhibition service market met the merger filing threshold under Taiwan's Fair Trade Act, Wanin was required to file the notification prior to the transaction but failed to do so, thereby violating the merger notification procedure.

Law stated - 21 April 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The legislation that governs the telecommunications sector includes the Act on the Organisation to Assign Radio Frequency and Regulate Broadcasting and Telecommunications Services 2010 (the NBTC Act) and the Telecommunications Business Act 2001 (the Telecommunications Business Act). The NBTC Act establishes the National Broadcasting and Telecommunications Commission (NBTC) as an independent broadcasting and telecommunications business regulator. Subject to supervision by the NBTC, a telecommunications committee regulates telecoms business compliance with the Telecommunications Business Act. The Telecommunications Business Act applies to operators of telecommunications services. Telecommunications 'service' is defined as a service that sends, transmits or receives signs, letters, figures, pictures, sounds, codes or anything else made comprehensible by frequency waves, wireless, lighting, electromagnetic systems or any other systems or other activities prescribed by law to be telecommunications services.

Thailand currently has three types of telecoms licences:

- Type 1 licence: for telecommunications business operators who provide telecommunications services without operating a telecommunications network;
- Type 2 licence: for operators who provide services to a specific group of customers with or without operating a telecommunications network; and
- Type 3 licence: for operators who operate a network providing services to the general public.

Additionally, any operator wishing to issue telephone numbers shall obtain a separate licence from the NBTC, subject to a Telecommunications Numbering Plan issued by the NBTC.

The general obligations applicable to licensed operators are:

- universal service obligations (USO): the licensee is required to contribute a percentage of revenue from their telecommunications services to the Broadcasting, Television and Telecommunications Development for Public Benefits Fund;
- access and interconnection of telecommunications networks: telecommunications business operators who own a network must allow other operators to interconnect with and access their networks;
- standard of telecommunications network and equipment: telecommunications networks, equipment and devices used in telecommunications services shall be inspected and certified before use;
- competition: licensed telecommunications business operators shall comply with the rules and regulations prohibiting activities that are harmful to competition as published by the NBTC; and

- contract for telecommunications services: a service contract between a licensee and a user shall be subject to the Telecommunications Committee's prior approval.

However, the NBTC is now stricter, and it takes more time to apply for telecommunications licences (namely, Type 1, 2 and 3 licences). This additional strictness is due to a change of internal policy at the NBTC regarding such applications.

Foreign ownership restrictions

The Foreign Business Act 1999 regulates business where the majority of stakeholders are non-Thai (namely, foreign business operators). Foreign businesses must obtain a foreign business licence from the Ministry of Commerce before operating in Thailand. The foreign business licence is separate from a telecoms licence and generally applies to all business sectors. Foreign telecommunications or media businesses are subject to sector-specific rules of foreign ownership. If there is a conflict between a provision of sectoral rules and general rules, the rules that impose a stricter standard will apply. The Telecommunications Business Act imposes various foreign ownership restrictions per the relevant type of telecoms licence as follows:

- Type 1 licence: no ownership restrictions apply; thus, operators with a Type 1 licence are only subject to the Foreign Business Act, and a foreign business licence is required;
- Type 2 licence: foreign ownership is limited to 49 per cent of the total shares; thus, a Type 2 licence holder may only have up to 49 per cent of its shares held by non-Thai shareholders; and
- Type 3 licence: the restrictions on Type 3 licence holders are the same as for Type 2 licence holders.

Law stated - 1 June 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

General qualifications of telecommunications business operators

Licence categories for telecoms business fall under Types 1, 2 and 3. In addition, the different categories of licences shall cover various services as indicated in the operator's licence application.

The applicant shall be a juristic person established under Thai law and shall not be bankrupt or a person who has previously had a telecoms licence revoked.

Once a licence is obtained, the licensee must pay an annual licence fee based on its annual revenue and the universal service obligation fee.

Internet service providers

Internet service provider (ISP) licences are categorised into three types, similar to telecommunications business operators. An applicant shall be a legal person (a juristic person) established under Thai law that has not previously had a licence revoked for cause. Recently, there has been a consolidation of ISP and telecommunications licences so that ISP licences were revoked and replaced with telecommunications licences. In other words, ISP licences have been consolidated into telecommunications licences. In addition, the duration of Type 1 telecommunications licences will be at least five years but not more than 25 years.

Mobile phone service providers

International mobile telecommunication falls within the 2.1GHz band (3G). The 2.1GHz band refers to a range of spectrum between 1,920MHz–1,965MHz and 2,110MHz–2,155MHz, which service providers are required to operate per the standards set by the International Telecommunication Union. An authorisation is granted to each applicant by auction conducted by the NBTC.

The applicant shall be a juristic person categorised as a limited company or a public limited company established under Thai law with a majority of Thai shareholders. The auction winner will be licensed to use the 2.1GHz international mobile telecommunications frequency, and a Type 3 licence is issued for at least five years but not more than 25 years.

Law stated - 1 June 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

A licensee shall not use the spectrum for a purpose that differs from the purpose granted under the licence. The authority may revoke a licence if the licensee fails to comply with the licence regarding spectrum use.

A licence to use the spectrum is an exclusive right of the licensee. An assignment is prohibited, whether in whole or in part. However, a licensee may authorise a third party to rent airtime, subject to the rules and regulations prescribed by the NBTC.

Law stated - 1 June 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Specific regulations impose oversight on operators under various circumstances in relevant telecommunications markets. The NBTC categorises the relevant markets as follows.

Retail markets consisting of:

- domestic fixed-line telephone services;
- domestic mobile telephone services;
- international telephone services;
- fixed-line internet services; and
- mobile internet services.

Wholesale markets consisting of:

- international internet gateway services;
- international telephone gateway services;
- network interconnection for fixed call termination services;
- network interconnection for mobile call termination services;
- wholesale broadband access services; and
- leased-line services.

The NBTC is authorised to identify telecommunications business operators with significant market 'power' (meaning operator capability that may pose a barrier to competition in the relevant market). Accordingly, the NBTC shall assess markets that are non-competitive and have barriers to competition and then identify the operators with significant market power (SMP).

A market shall be deemed non-competitive if it has:

- a high market concentration (according to the Herfindahl-Hirschman Index as determined by the NBTC);
- a high barrier to new entry; or
- low competition with no potential for improvement.

If a market is deemed to be non-competitive, then the NBTC shall categorise operators in such market as SMP operators as follows:

- operators that have a market share (including the market share of its subsidiaries) of at least 40 per cent; or
- operators that have a market share of 25 per cent to 40 per cent but that the NBTC considers as having SMP, taking into account the following:
    - size of overall business;
    - control over fundamental network facilities;
    - technological advantage (compared to other operators in the same market);
    - bargaining power;
    - access to funding resources;
    - variety of products and services;
    - economies of scale;

- economies in production;
- vertical integration of service businesses;
- a high volume of distribution or sale of products;
- competency to compete in the market;
- barriers to business growth; and
- the capability of new entry by competitors to the market.

If it is impossible to identify only one SMP operator because of market concentration, the similarity of products or services, the similarity of cost structure or the similarity of market share. In that case, the NBTC may identify more than one operator in the market as an SMP operator.

SMP operators, or any operators with more than 25 per cent market share in any relevant markets, are forbidden from conducting the following activities:

- price discrimination;
- stipulating a fixed fee;
- stipulating service fees or product prices lower than the cost to limit competition;
- stipulating conditions to force other operators to use certain services or to limit choices of services;
- unreasonably restrain from, reduce or limit the provision of services or sale of products;
- stipulating unfair conditions on the provision of services to other operators;
- refusing to provide necessary networks or facilities to other operators;
- bundling services or products to other operators;
- concealing information necessary for using or providing services;
- using information derived from other operators to create a competitive advantage;
- using techniques with the intent to limit the services of other operators;
- entering into agreements or conditions with other operators or other persons with the intent to reduce or limit competition; and
- other activities that the NBTC may stipulate from time to time.

In addition, the NBTC may issue specific measures to impose obligations or stipulate conditions on any individual operators or SMP operators, which may include orders to:

- perform or restrain from activities deemed harmful by the NBTC;
- keep a separate accounting system for some services;
- disclose or report information;
- change cost-calculation formulas;
- set prices or fees for certain services;
- provide services to other operators;

- separate services;
- cancel or amend terms in service agreements; and
- other measures that the NBTC may stipulate.

Law stated - 1 June 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

There is currently no regulatory framework that requires structural separation. The NBTC has set out a framework for structural separation in the television sector but has not enacted regulation.

As for functional separation, a regulation requires a telecommunications business operator to separate telecoms-related business from non-telecoms-related business for accounting purposes. Therefore, an SMP operator may be further subject to the NBTC's discretionary authority and may be requested to further separate categories of telecommunications business in its accounting.

Law stated - 1 June 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

The USO require service providers to provide certain telecommunications services in rural areas, educational institutions, social assistance agencies and underprivileged citizens. These services will be funded by income allocated by the licensees through USO fees, which licensees must pay annually to the Broadcasting, Television, and Telecommunications Development for Public Benefits Fund.

The obligations imposed may not pose an undue financial burden on a service provider or cause discrimination among service providers. Therefore, the NBTC must notify a service provider of its obligations before submitting a licence application. The current USO fees policies issued by the NBTC charge licensees at the rate of 2.5 per cent of the net income from telecommunications services, plus 7 per cent value added tax.

Law stated - 1 June 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

The NBTC is the authority responsible for allocating numbers used for services or service areas under the following rules and regulations:

- use of international access numbers with service codes;
- telecommunication numbering allocation;
- telecommunication numbering plan;
- criteria for the assignment and permission of unique telecommunication numbers; and
- criteria for allocation and administration of telecommunication numbers.

The NBTC prescribes that a service user is entitled to mobile number portability, and service providers are prohibited from acting in any manner that obstructs or impedes the porting of mobile numbers to other service providers.

Law stated - 1 June 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

Telecoms law imposes tariffs, service charges and specific consumer protections on telecommunications business operators. In addition, contracts with consumers for mobile phone services are governed by relevant regulations and consumer protection laws.

The NBTC regulates the content of telecom service contracts and subjects them to be pre-approved by the NBTC before becoming effective. The NBTC also issues notifications regulating the rates of fees for telecommunications services. A telecommunications business operator who wishes to charge more than the maximum rate determined by the NBTC must submit a request to the NBTC for approval. Telecommunications business operators are also required to establish procedures and policies to receive and address consumer complaints.

Law stated - 1 June 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

There are no regulations that impose restrictions on zero-rating or bandwidth throttling. ISPs may allow access to certain services or applications free of charge and can prioritise the type or source of data they deliver.

However, as ISPs are subject to competition law, they must provide services non-discriminatory, allow interconnection with other ISPs, and facilitate equal access to services.

Non-discrimination

Under the Telecommunications Business Act, ISPs shall provide services on equivalence and non-discrimination principles. ISPs are also prohibited from taking any action that may monopolise, reduce or limit competition in the ISP market.

Interconnection

Operators who own their networks must allow other operators to interconnect and access their networks. However, operators may refuse access to their network if the use of the network results in technical problems that may obstruct their business or under any circumstances as prescribed by the NBTC from time to time.

Access

ISPs shall ensure that all users have equal access to telecommunications services.

Law stated - 1 June 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

The Computer Crimes Act 2017 (as amended) (CCA) requires a 'service provider' (defined as a person who provides other persons with access to the internet or the ability to communicate through a computer system) to retain computer traffic data and user identification data in the following manner.

- Computer traffic data means data related to computer system-based communications showing sources of origin, starting points, destinations, routes, time, dates, volumes, time periods, types of services, or others related to that computer system's communications. Computer traffic data shall be retained for at least 90 days from when such data was first entered into the computer system. The official may order a service provider to retain computer traffic data for longer than 90 days, but not exceeding two years.
- User identification data, which means information about the service necessary for identifying service users. The service provider shall retain user identification data to the extent that it is required to identify the service user from the beginning of the service provision. Such user identification data must be kept for at least 90 days after such service is terminated.

Law enforcement is authorised to access that data to investigate computer crimes. The CCA imposes criminal liability on any individual who engages in activities that violate the CCA. Additionally, the content on an ISP's platform may be subject to other generally applicable laws.

In addition, the Ministry of Digital Economy and Society requires all service providers, including digital platform providers, to establish digital verification and authentication system using technology that is consistent and in compliance with the Ministry of Digital Economy and Society (MDES) conditions and minimum reliability standards for the verification and authentication of its customers.

E-commerce platforms (online platforms that allow for the sale and purchase of products or services) are considered direct marketing businesses and regulated under the Direct Sale and Direct Marketing Act 2002.

Laws concerning intellectual property may apply to specific online activities. However, if a service provider is not responsible for the control or initiation of an infringement, and such service provider used reasonable efforts to comply with law enforcement or rectify such infringement, the service provider shall not be liable for infringement occurring before the issuance of the court order or after the date of such order's expiry.

The Cyber Security Act created a National Cyber Security Committee with authority to command operators in the private sector to implement procedures to prevent cyber threats. Failure to comply with such orders may be subject to criminal punishment.

In addition, a service provider may be considered a data controller or data processor, or both, under the Personal Data Protection Act BE 2562 (2019) (PDPA) if such service provider obtains any personal data protection of a consumer (eg, name, email address, telephone number, cookies). Notably, the PDPA was initially due to be fully enforced on 27 May 2020; however, based on the Royal Decree on Organisations and Businesses of which Personal Data Controllers are Exempt from Complying with the Personal Data Protection Act No. 1 and 2 (Royal Decree), the enforcement date was postponed to 1 June 2022. The Royal Decree lists various types of business that qualify for the extension of the enforcement, including businesses in communication, telecommunication, digital, science, technology, banking, education, industrial and commercial industries, among others

Law stated - 1 June 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

In Thailand, NGA networks are referred to as next-generation networks (NGNs). An NBTC notification regarding the specified technical standard for the connection of telecom networks regulates the obligations of NGNs. The notification specifies the minimum standards for connection of the NGN with which the service provider must comply.

Law stated - 1 June 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

The PDPA has been fully implemented since 1 June 2022, and it is important to note that compliance with the PDPA is mandatory for all business sectors, including the TMT sector. The implementation of the PDPA has been a contentious issue, as it has necessitated significant changes to business operations, particularly in terms of customer engagement. While the PDPA's provisions bear similarity to those of other data privacy laws in various jurisdictions, such as the EU General Data Protection Regulation, there remain certain provisions within the PDPA that require further clarification, as they are currently pending notification by the Personal Data Protection Commission (PDPC).

Most recently, guidelines have been established outlining the cross-border transfer of personal data (namely, the transfer of personal data outside of Thailand) in relation to section 28, which addresses the criteria for adequacy country, and section 29, which concerns appropriate safeguards under the PDPA. These guidelines prescribe the criteria for considering a destination country as qualified for the transfer of personal data and provide criteria for appropriate safeguards for cross-border transfers in the absence of an official list of adequacy countries from the PDPC.

Furthermore, the NBTC has recently released a Notification Re: Measures to Protect the Rights of Telecommunications Service Users Related to Personal Data, Rights to Privacy, and Liberty to Communicate through Telecommunications (NBTC Personal Data Protection Notification). This NBTC Personal Data Protection Notification repealed and replaced the existing NTC (National Telecommunications Commission, now the NBTC) Notification on data protection, which had been applicable to telecommunications business operators since 2006. While the NBTC Personal Data Protection Notification has been updated and revised to align with the PDPA, it contains provisions specific to the telecommunications business sector. These include the following.

- Special category personal data: prohibiting the collection of special category personal data, which includes race, ethnicity, political opinions, beliefs, sexual behaviour and criminal record, without the explicit consent of the user, unless it is to provide telecommunications service to a disabled person.
- Retention periods: telecom licensees are required to retain the personal data of their customers throughout the period of provision of telecom services, by retaining such information retroactively for at least a 90-day rolling basis. However, in cases where there are complaints regarding the provision of service, the telecom licensee must retain the customer's personal information until the complaint has been finalised, but not exceeding two years. Additionally, if the provision of telecom services is terminated, the telecom licensee is required to retain the customer's personal information for at least 90 days from the termination date. If necessary, the telecom licensee may retain the customer's personal information for more than 90 days, but not exceeding two years.
- Data-breach notification: telecom licensees must notify the NBTC without delay within 72 hours of becoming aware of a breach of any user's personal data, or within

24 hours if the breach is likely to result in a high risk to the rights and freedoms of the user.

Law stated - 1 June 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

The Cybersecurity BE 2562 (2019) (the Cyber Act) was published on 27 May 2019 to enforce legal safeguards to ensure national security in cyberspace, including a cybersecurity risk assessment plan, to prevent and mitigate cybersecurity threats that may affect the stability of national security and the public interest (eg, economy, healthcare, international relations, government functions).

The Cyber Act is intended to protect Thailand's national security systems from cyber-related threats and crime. The Cyber Act broadly defines 'cyber' as any information or communication from a computer network, a telecommunications network or the internet. It focuses on the safety of government computer systems and provides government entities and officers with the authority to carry out the provisions of the Cyber Act. A National Cyber Security Committee created under this Cyber Act will be responsible for all national security matters connected with the government's data and computers.

Cyber threats are categorised into three levels under the Cyber Act as follows:

- non-critical: any threat that may negatively impact the performance of a government computer system;
- critical: any threat to a government computer system related to the national infrastructure, national security, the economy, healthcare, international relations, the functions of government, etc, which may cause damage or impair a government computer system; and
- crisis: any threat more significant than a critical level event, which may have a widespread impact such as causing the government to lose control of a computer system, an immediate threat to the public that could lead to mass destruction, terrorism, war, the overthrow of the government, etc.

On 11 December 2021, to help determine the severity of cyber risks, the National Cyber Security Committee issued the 'Notification of the Cyber Security Committee Subject: The types of cyber threats and measures to prevent, withstand, evaluate and suppress cyber threats, 2021', to characterise and assess each cyber threat level based on a variety of parameters. To determine the cyber threat level, one must analyse events, which are the situations, repercussions, dangers or trends that may result from cyber threats in various cases, by considering the four variable factors listed below:

- the impact on the equipment or the system;
- the impact on data in the system;
- system recovery tendency; and

- the impact on customers or service users.

All four aforementioned variables should be used for evaluation when defining each level of cyber threat. If the nature of the cyber threat appears to be related to, or likely to be, a cyber threat to some extent, the highest level assessed shall be used as a criterion for determining the level of cyber threats at the moment. In addition, the critical information infrastructure, in collaboration with regulators, may evaluate additional evaluation variables and cyber threat characteristics to provide instructions on how to accurately define the level of cyber threats.

There are two central cybersecurity regulatory authorities organised by the Cyber Act, as follows.

National Cyber Security Committee

The National Cyber Security Committee (NCSC) comprises the prime minister of Thailand as the chairman and directors from the government and the private sector who hail from areas that benefit cybersecurity, such as engineering, law and information technology. The NCSC sets out general cybersecurity policies and action plans and minimum standards for computer systems used in both government agencies and critical information infrastructure (CII) entities, according to the national cybersecurity master plan.

The NCSC also has the authority to determine the levels of cybersecurity threats under the Cyber Act (namely, non-critical, critical and crisis) and the preventive and mitigative measures that should be in place for each of these levels. To enable this, the NCSC is empowered to request information and documents from and access the facilities of private entities, subject to the owner's consent, to analyse and evaluate the impact of the critical cyber threat to determine cybersecurity threat levels and appropriate preventive, mitigative measures.

Cyber Security Regulatory Committee

The Cyber Security Regulatory Committee (CSRC) consists of the Minister of the MDES as the chairman. Like the NCSC, it has government and private-sector directors from areas that benefit from cybersecurity. The role of the CSRC is to set out codes of practice and minimum standards for cybersecurity in public and private sectors relating to CII operators, including risk assessment and mitigation plans against cyber threats. In addition, the CSRC may order public and private-sector entities to prevent, mitigate or re-evaluate cyber threats in line with prescribed cybersecurity minimum standards.

If a critical level threat is discovered, the CSRC is empowered to perform any action to prevent or mitigate such threat. Furthermore, if judicial permission is granted, the CSRC may access information or seize computer systems, data and related equipment for a maximum of 30 days to prevent and mitigate cyber threats.

In the case of a crisis-level threat, the NCSC shall be in charge of carrying out its duties. However, for any crisis-level threat that requires an immediate response, the CSRC is authorised to perform any act warranted as necessary without judicial permission.

In addition to the two aforementioned central regulatory authorities, two other relevant authorities, including the Computer Security Coordination Center and competent regulators responsible for monitoring and acting against cyber threats and regulating minimum cybersecurity requirements for CII operators under their supervision.

Law stated - 1 June 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

Currently, there is no specific legislation for big data. However, suppose such big data is included in the personal data. In that case, the data controller or data processor, or both, of such big data must follow the provision specified in the PDPA. For example, obtaining the data subject's prior consent, informing the purpose of collecting the data subject's personal data, informing the period of the retention period to the data subject, etc.

The PDPA came into force on 1 June 2022. The various types of businesses that are qualified for the extension of the enforcement include businesses in communication, telecommunication, digital, science, technology, banking, education, industrial and commercial industries, among others.

Law stated - 1 June 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

Currently, no specific law or regulation requires data to be stored locally in Thailand. Nevertheless, specific industry-specific regulations require some data to be available or processed within Thailand. The banking industry, for example, is required to process debit card transaction data and make electronic payment system data available in Thailand.

Law stated - 1 June 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

The NBTC is preparing for a significant spectrum auction in early 2025, with the goal of facilitating the country's transition to 5G-Advanced (5G-A) and eventually 6G technologies. The auction will focus on the 2,100 MHz and 2,300 MHz bands, which are currently held by state-owned National Telecom (NT). The licences for these bands will expire in September

2025, and although NT requested an extension, major telecom companies have been lobbying for these bands to be auctioned sooner. The auction, set for the first quarter of 2025, is expected to support the development of 5G-A networks, with the NBTC offering licences for 10 to 15 years. The starting prices for these licences will be kept relatively low to encourage competitive bidding.

The auction of the 2,100 and 2,300 MHz bands is part of a broader spectrum management strategy covering the 2025–2030 period, which will also involve additional spectrum auctions for bands in the 3,300–4,000 MHz and 6.425–7.125 GHz ranges. These additional auctions will be critical for the continued evolution of mobile networks in Thailand, enabling the expansion of 5G-A and 6G services. The NBTC's roadmap aims to ensure that Thailand remains competitive in the global telecommunications landscape, providing the necessary infrastructure for high-speed mobile broadband, Internt of Thing, and smart city technologies.

In addition to these developments, the NBTC is also planning to recall the 3,500 MHz band, currently used by digital TV broadcasters, to make it available for mobile networks. The auction for this band is planned for 2027, with the spectrum to be available for use by 2029, following the expiration of digital TV licences. Despite opposition from the digital TV industry, the NBTC argues that the 3,500 MHz band is better suited for mobile networks, as per the guidelines of the International Telecommunication Union. The planned recalls and auctions highlight the NBTC's strategic focus on optimising spectrum use to support the growth of next-generation networks in Thailand.

With these initiatives, Thailand is positioning itself to lead in the deployment of 5G-A and 6G technologies in Southeast Asia. The upcoming spectrum auctions will be pivotal in shaping the future of the country's telecommunications sector, ensuring that telecom operators have the necessary resources to meet the growing demand for high-speed, low-latency services. As the 2025 auction date approaches, industry stakeholders will closely monitor the NBTC's actions and decisions to ensure that Thailand remains competitive in the rapidly advancing global digital economy.

Law stated - 1 June 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The Broadcasting and Television Business Act 2008 regulates the media sector in the following ways:

- licensing requirements: certain types of business (specifically, operating public services or community services) are reserved for government entities and non-profit organisations. Services intended for generating profit are available for operation by the private sector, subject to licensing requirements from the National Broadcasting and Telecommunications Commission (NBTC);
-

use of the frequency spectrum: a licence from the NBTC is required to operate a sound broadcasting business or television business that utilises a frequency spectrum. Licences are limited to the frequency of assignments stipulated by the NBTC;

- station management: for media businesses, a director (who must be of Thai nationality) will supervise and control programming, programme hosting and broadcasting, and ensure that the respective station complies with the regulations prescribed by the NBTC;
- prevention of monopoly: the licensee is prohibited from being a stakeholder of another company in the same category of business and from cross-holding a business in sound broadcasting and television using a frequency spectrum over the proportions authorised by the NBTC;
- TV programmes: TV operators shall comply with the must-carry and must-have rules issued in the NBTC's notifications. Under must-carry rules, free-to-air TV operators are responsible for expenses they incur in providing public broadcasting services. Under must-have rules, free-to-air TV operators must broadcast seven TV programmes, namely:
    - the SEA Games;
    - ASEAN Para Games;
    - the Asian Games;
    - the Asian Para Games;
    - the Olympic Games;
    - the Paralympic Games; and
    - the FIFA World Cup Final (other operators that are not free-to-air TV operators are prohibited from broadcasting such must-have programmes).
- promotion and control of the professional ethics of licensees, programme producers and mass-media professionals: such licensees, programme producers, and mass-media professionals have a duty to set ethical standards for the profession and shall apply such standards to self-regulate the industry; and
- construction of, use and connection to the broadcasting network: the NBTC must approve the construction of an entire network. Furthermore, a network owner shall allow licensees to utilise their network per the criteria and procedures prescribed by the NBTC.

In addition to the Broadcasting and Television Business Act 2008, the Film and Video Act 2008 regulates the content of films, videos and their advertising media. A censorship committee of officials will review, approve or censor the content of films, videos and their advertisements and approve other activities relating to film and video, such as the production or distribution of foreign films in Thailand.

Law stated - 1 June 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

The Foreign Business Act 1999 regulates all businesses in which a majority of the shareholders are non-Thai. Foreign businesses are required to obtain a licence from the Ministry of Commerce before operating in Thailand. The Act generally applies to all business sectors.

Foreign media businesses are subject to foreign ownership restrictions. If there is a conflict between sectoral rules and general rules, the rules applying a stricter standard will prevail.

The Broadcasting and Television Business Act 2008 imposes foreign ownership restrictions according to the type of broadcasting licence (eg, radio, TV, etc) as follows:

- a licence to operate public services (where the main objective is to provide public services): this licence is only available to government entities and specific associations, charities, foundations and educational institutions, and not to private-sector operators;
- a licence to operate community services (where the objective of the business is to provide a public service that meets the needs of the community or locality receiving the services): this licence is only available to government entities and specific associations, charities, foundations and educational institutions, and not to private-sector operators; and
- licences to operate business services (where the main objective is to generate profit) are subdivided into three classes: national, regional and local. Foreign ownership is limited to 25 per cent. The foreign ownership restriction under this sector-specific law applies to the general Foreign Business Act; thus, the holder of such licence may only have up to 25 per cent of its shares held by non-Thai shareholders.

A licensed operator that intends to merge with another licensed operator shall submit a request for permission from the NBTC at least 60 days before the execution of such transaction under the following circumstances:

- register an official corporate registration for a merger that will result in either a licensed operator being dissolved (or a merger that will result in both licensed operators being dissolved and a new legal entity being established);
- enter into a share acquisition agreement wherein a licensed operator acquires all or part of assets of another licensed operator; or
- enter into a share acquisition agreement by which a licensed operator acquires all or part of the shares of another licensed operator to manage, direct or control such licensed operator. Cross-shareholding between two licensed operators requires the prior approval of the NBTC at least 60 days before executing such a transaction.

Law stated - 1 June 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

General qualifications

An applicant must be of Thai nationality, shall not be on a probationary period restricting the applicant from using the licence and cannot have yet exceeded three years of a licence withdrawal period. The approval process usually takes up to 60 days after submitting all the necessary documents. If approved, the applicant will be granted the right to operate under the express terms of the granted licence. In addition, a broadcasting schedule may be allocated to other licensed broadcasters under the condition that the broadcaster complies with the rules and regulations prescribed by the Broadcasting and Television Committee.

Sound broadcasting business or television business using a frequency spectrum

There are three types of licences for this kind of operation:

- a licence to operate public services;
- a licence to operate community services; and
- a licence to operate business services.

A licence to operate public services (where the main objective is to provide public services) is only available to government entities and specific associations, charities, foundations and educational institutions, and not private-sector operators. A licence to operate community services (where the objective of the business is to provide a public service that meets the needs of the community or locality receiving the services) is only available to government entities and specific associations, charities, foundations and educational institutions, and not to private-sector operators.

Licences to operate business services (where the main objective is to generate profit) are subdivided into three classes: national, regional and local. Foreign ownership is limited to 25 per cent. The foreign ownership restriction under this sector-specific law applies to the general Foreign Business Act; thus, the holder of such licence may only have up to 25 per cent of its shares held by non-Thai shareholders. In addition to those ownership restrictions, if the operation is executed at regional and local levels, then the applicant shall have at least one-third of the equity and have stable financial status as determined by the NBTC and any other qualifications that can guarantee the stability of operations. Additionally, the applicant shall be a state enterprise or a company established under Thai law. The same criteria apply to licences regarding Sound Broadcasting Businesses or Television Businesses that do not utilise a frequency spectrum.

Duration and fee

The Broadcasting and Television Committee will grant a seven-year term for sound broadcasting licensees and a five-year term for television broadcasting licensees. Licences

may be renewed 90 days before expiry. Meanwhile, the licensees are obliged to pay annual fees for their respective licences.

Law stated - 1 June 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

Thailand does not have regulations concerning broadcasting foreign-produced programmes or the proportionality between foreign and local content. Nonetheless, licensees of sound broadcasting or television businesses using a frequency spectrum are required to broadcast programmes composed of news or content that is useful to the public as determined by the NBTC, as well as other required programmes at certain specific times, such as the national anthem at 8am and 6pm. Additionally, the NBTC may implement additional measures for the benefit of the disabled or underprivileged.

Law stated - 1 June 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Duration

According to the Broadcasting and Television Business Act 2008, an advertisement publicised through sound broadcasting or television using a frequency spectrum shall not exceed 12-and-a-half minutes per hour, and the total runtime of advertisements for a whole day shall not exceed an average of 10 minutes per hour.

Advertisements publicised on a non-frequency use spectrum may not exceed six minutes per hour, and the total amount of time for advertisements in a single day shall not exceed an average of five minutes per hour. Time limits do not restrict online advertisements. However, an operator must ensure that the duration of an advertisement does not affect consumers under the Consumer Protection Act 1979.

Advertising content

The content of advertisements is governed by regulations relevant to the purpose of the advertisement. For example, a cosmetics advertisement would be governed by the Cosmetic Product Act 2015.

Law stated - 1 June 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Licensed broadcasters must follow the requirements set out by the NBTC regulations, including requirements relating to show ratio, show categorisation, time allocation of the TV show to be broadcast, and the management of advertisements. Broadcasters are categorised into two main types:

- broadcasters that use TV broadcast frequencies; and
- broadcasters that do not use TV broadcast frequencies.

Broadcasters' requirements

Licensed broadcasters are further categorised into types according to the primary purpose of their broadcasting. Each type of broadcasting must include at least the following show ratios:

- public service broadcaster: 70 per cent of the shows must be for the benefit of the public, such as news reports, knowledge-related shows or documentaries;
- local service broadcaster: 70 per cent of the shows must be for the benefit of a specific local jurisdiction, such as within one district or province, and must have at least 50 per cent of the shows produced by the producers from such local jurisdiction; and
- business-oriented broadcaster: 25 per cent of the shows must be for the benefit of the public, such as news reports, knowledge-related shows or documentaries. A business-oriented broadcaster at the provincial level must have self-produced shows account for at least 50 per cent of the total shows.

Types of TV shows can be divided into six categories, and licensed broadcasters must self-rate shows and allocate shows to the proper time slot as set out by the NBTC regulations, as follows:

- Category Por is for children, produced for an audience aged between three and five years old;
- Category Dor is for children, produced for an audience aged between six and 12 years old;
- Category Tor is a general TV show, for audiences of all ages;
- Category Nor 13 is suitable for an audience whose age is more than 13 years old and must be broadcast between 8.30pm and 5am only;
- Category Nor 18 is suitable for an audience whose age is more than 18 years old, and must be broadcast between 10pm and 5am only; and
- Category Chor is suitable for adults only and must be broadcast between midnight and 5am only.

In addition, broadcasters that use TV broadcasting frequencies must allocate at least 60 minutes between 4pm and 6pm on Monday to Friday and 7am and 9am during the weekends for shows to develop and benefit children. In addition, licensed broadcasters must broadcast the Thai national anthem twice a day – at 8am and 6pm – and they must broadcast the Royal Family's news every day from 7pm to 8.30pm.

Licensed broadcasters must submit to the NBTC overall broadcast schedules, show ratio and plans of TV shows, including the categorisation and time allocation of the show using the application form provided by the NBTC at least 15 days before the initial operation. After the first year, licensed broadcasters must submit their planned broadcast schedule with the aforementioned information at least once a year to the NBTC for its approval at least 15 days before the broadcasting. If the NBTC finds that the broadcaster is not following the regulations concerning its categorisation and time allocation, then the NBTC shall issue a warning letter asking the broadcaster to revise the schedules and plans of its TV shows before broadcasting. Any change to the approved schedules and plans must be submitted to the NBTC at least seven days before broadcasting. There is no mechanism for financing the costs of the above-mentioned obligations.

Broadcasting licensees must broadcast news and warnings to the public in a disaster or emergency case as prescribed by the NBTC. Programmes affecting state security, disrupting public order, containing revolutionary material concerning the overthrow of the government or containing obscenities that are against community standards are prohibited. Licensees are obligated to examine and suspend the broadcasting of programmes that have the aforementioned characteristics.

Law stated - 1 June 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

New media is relatively recent and is not as rigidly regulated as traditional broadcast media. However, the government is currently considering policies to regulate new media content.

Law stated - 1 June 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

In 2012, the NBTC promulgated the First Broadcasting Master Plan (2012–2016) (the Plan), delineating that the transition to digital broadcasting transmission falls into one of seven main categories subject to regulation. The Plan established transition policies and planned to switch to digital television broadcasting within one year and switch to digital audio broadcasting transmission within two years. Commencement of digital audio

broadcasting and television broadcasting was anticipated at that time to begin within four years. The authorisation to use frequency for digital television services will be granted by auction, while other categories (such as community or public services) will be granted at the discretion of the NBTC.

Policies and plans to switch over from analogue to digital television broadcasting have been completed within the expected period, which was 2015. Currently, digital television is being widely broadcasted in Thailand. In addition, Digital audio broadcasting (at frequency spectrum 174–230MHz) is now being tested in several provinces throughout Thailand per the policies and plans issued by the NBTC.

Law stated - 1 June 2025

Digital formats

25 | Does regulation restrict how broadcasters can use their spectrum?

No measures restrict how broadcasters can use their spectrum, except a licensee is obligated to comply with the rules and regulations of the respective licence they have been granted.

Law stated - 1 June 2025

Media plurality

26 | Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

To evaluate the efficiency of market competition, the Herfindahl-Hirschman Index (HHI) is applied to assess market concentration. The assessment will result in the squared total market share for each licensee. If the value of HHI reflects that market concentration is high, then that will be taken by the NBTC to mean that market competition is inefficient. The NBTC may then roll out specific precautionary measures to prevent any licensee with significant market power from monopolising, restricting, hindering competition or misusing market power. If precautionary measures are imposed on a licensee with dominant market power, such licensee may object, and the NBTC may hold a public hearing on the objection. Likewise, measures set forth by the NBTC are subject to adjustments at its discretion.

Law stated - 1 June 2025

Key trends and expected changes

27 | Provide a summary of key emerging trends and hot topics in media regulation in your country.

In 2025, Thailand is advancing its regulatory framework for over-the-top (OTT) platforms and streaming services. These platforms, which deliver content directly over the internet without relying on traditional telecom or cable services, have grown rapidly and are currently subject to minimal regulatory oversight. The Thai government, through the Ministry of Digital Economy and Society (DES), has recognised the need for a more robust framework that addresses issues such as content regulation, data protection, fair competition and consumer rights.

Historically, OTT services have not been directly regulated by the Broadcasting and Television Business Act or similar broadcasting legislation. This regulatory gap has led to inconsistencies in content monitoring and compliance with national laws. However, the DES has tasked the NBTC and the Electronic Transactions Development Agency (ETDA) with developing a regulatory framework that will address content oversight, licensing, tax compliance, and digital industry promotion, with a particular focus on foreign OTT platforms operating in Thailand.

Existing laws, such as the Copyright Act and the Computer Crimes Act, are being applied to OTT services to address intellectual property and illegal content issues. Despite these efforts, enforcement remains challenging due to the international nature of OTT platforms and the use of encryption technologies. Going forward, Thailand will need to adapt its legal approach to ensure that these services comply with local standards, protecting both consumers and national security, while fostering innovation in the digital media sector.

Law stated - 1 June 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The National Broadcasting and Telecommunications Commission (NBTC) regulates the media and telecom sectors, an independent organisation established by the Act on the Organisation to Assign Radio Frequency and Regulate Broadcasting and Telecommunications Services 2010. Under the supervision of the NBTC, a Broadcasting Committee regulates media businesses, and a Telecommunications Committee regulates telecommunications businesses.

Under the Trade Competition Act 2017, which became effective in October 2017, the trade competition authority relinquished its authority to regulate specific sectors, including broadcasting and telecommunications businesses. In other words, since the Trade Competition Act 2017 became effective, the broadcasting and telecom sectors that used to be regulated by specific legislation on trade competition have been exempted from complying with general competition laws and are only subject to sectoral regulations on competition.

Law stated - 1 June 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

A broadcasting or telecoms operator has the right to appeal orders or decisions of the NBTC to the Broadcasting Committee (if the order involves a broadcasting business) or to the Telecommunications Committee (if the order involves a telecoms business) within 15 days of receiving an order or decision.

If the order or decision is upheld, then the appellant has the right to further appeal to the Administrative Court within 90 days from the date the appellant received notice of the appeal decision.

Challenges to the NBTC are limited to having a cause in one of the following:

- the issuance of an order or decision without expressed basis, or not within the authority of a regulatory body;
- the issuance of an order or decision inconsistent with the law, process or procedure;
- the issuance of an order or decision in bad faith;
- abuse of discretion; or
- discrimination.

Law stated - 1 June 2025

Competition law developments

30 | Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

In 2024, Thailand's competition law framework remained dynamic, particularly with the enforcement of the Trade Competition Act BE 2560 (2017), which continues to be pivotal in the regulation of mergers and market competition. The Trade Competition Commission of Thailand (TCCT) focused on ensuring that mergers in the communications and media sectors do not stifle competition. Despite no major legislative amendments this year, the TCCT maintained an active role in monitoring and reviewing mergers, enforcing fair competition, and preventing market abuses.

One of the key developments in 2024 was a major merger within the telecommunications industry. True Corporation and Total Access Communication (DTAC), two of Thailand’s largest telecom operators, reached a landmark agreement to merge, with the merger valued at approximately US$ 8 billion. This transaction was scrutinised by the TCCT for potential anti-competitive concerns, particularly given the consolidation of market power in a sector with limited competition. The TCCT’s decision to approve this merger, subject

to specific conditions, marked a critical moment in the ongoing challenge of regulating monopolistic behaviours in highly concentrated industries.

Law stated - 1 June 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

The United Arab Emirates (UAE) consists of seven emirates, each of which operates as its own legal jurisdiction, and laws are made at both a federal and an emirate level. Some emirates have defined areas within them that have been designated as free zones, which typically have separate civil and commercial laws for businesses and individuals in the relevant free zone, although they all remain subject to the UAE federal criminal law. Examples of free zones in the UAE include Dubai International Financial Centre, Dubai Creative Clusters Authority and Abu Dhabi Global Markets. For the purposes of this chapter, unless otherwise specified, we focus on the laws and regulations applying at a federal level.

The principal law in the UAE that relates to the communications sector is Federal Law No. 3 of 2003 Regarding the Organisation of the Telecommunications Sector (the Telecoms Law).

The Telecoms Law establishes the Telecoms and Digital Government Regulatory Authority (TDRA) as the regulator of the telecommunications and information technology sector in the UAE. The Telecoms Law establishes a licensing-based regulatory framework for the supply of telecommunications services to customers in the UAE. Article 37 of the Telecoms Law, for instance, provides that individuals and corporate entities may not provide 'telecommunications services' through 'public telecommunications networks' to customers and 'subscribers' without obtaining a licence. Article 37 of the Telecoms Law is complemented by the TDRA's Resolution No. (6) of 2008 regarding the Licensing Framework (the Licensing Framework). The Licensing Framework provides that 'regulated activities' in the state are licensable by the TDRA. Here, 'regulated activities' means the operation of a 'public telecommunications network' or the provision of 'telecommunication services'.

Telecommunications services are defined in the Telecoms Law as delivering, broadcasting, converting or receiving, through a telecommunications network:

- wire and wireless communications;
- voice, music and other audio material;
- viewable images;
- signals used or transmission (other than public broadcasts);
- signals used to operate and control machinery or equipment;
- activities relating to the interconnection of equipment with a public telecommunications network;
- operating data transmission services, including the internet; and
- any other services approved by the High Committee appointed under the Telecoms Law.

Foreign ownership restrictions that previously applied to onshore companies in the UAE have been eased following amendments under Federal Decree-Law No. 26/2020 to the UAE's Commercial Companies Law (Federal Law No. 2/2015) (which has now been replaced by Federal Decree-Law No. 32/2021 on Commercial Companies). The Departments of Economic Development of Abu and Dubai have both released their respective lists of activities that would allow foreigners to establish companies with 100 per cent full ownership.

The Cabinet Decision No. 55/2021 on the Determination of the List of Strategic Impact Activities outlines seven categories of activities (eg, education, defence and telecommunications) that are considered to have a strategic impact on the UAE's economy whereby prior approval of the relevant regulatory authority needs to be obtained. Save for fisheries-related services (which requires 100 per cent UAE ownership), the specific details of minimum UAE ownership and UAE board representation requirements of these activities are to be decided by the relevant regulatory authority (Strategic Impact List).

Companies established in free zones are exempted from these foreign shareholder restrictions and can be wholly foreign-owned, and several international communications operators have established wholly owned entities in such free zones; however, they cannot offer public telecommunications services in the UAE, which, since 2006, has been a closed duopoly market.

The two providers of public telecommunications services (du and Etisalat) are licensees of the TDRA. The eligibility element of each licence refers to the licensee being a 'UAE juridical entity established and in good standing under the laws of the UAE'.

Other than public telecommunications services, there is scope for non-UAE businesses to actively participate in the broader communications sector, although even international businesses that have procured a specific licence from the TDRA have largely done so through a UAE-incorporated entity as the licensee. Beyond the provision of public telecommunications services in the UAE, there are many businesses offering products and services as part of the wider communications ecosystem, and many of these are not subject to foreign ownership restrictions.

Law stated - 8 May 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

Under the Telecoms Law, the provision, operation or sale of any telecommunications services through a public telecommunications network in the UAE requires a licence from the TDRA.

Currently, only two operators are licensed for public telecommunications in the UAE: du and Etisalat. This follows government policy on the operation of a duopoly in the telecommunications field. We understand the TDRA is not currently considering further licences to break the duopoly.

The licences granted to du and Etisalat have various features; for example, each is required to filter the content that flows through its networks in line with the priorities of the state. Notable content filtering takes place concerning matters concerning the state, foreign policy and morality issues. The decision as to which content should be filtered is essentially made through private discussions between the TDRA and the mobile operators (regarding TDRA policies on internet access), but there is no practice of publishing details on specific content-level filtering rationale.

In addition to the duopoly policy on fixed and mobile public telecommunications services, the TDRA has issued licences to other UAE entities for specific purposes, such as broadcast satellite transmission, public access mobile radio, mobile satellite and satellite services.

All such licences are issued individually to entities meeting various requirements under the Telecoms Law and under a decision made by the TDRA board. A licence can be categorised as either a class licence or an individual licence. Individual licences refer to whether scarce resources are requested such as spectrum or frequencies; class licences are issued where non-scarce resources are required and where the activities are insignificant enough that less regulatory supervision is required.

The TDRA requires an application form to be completed by a potential licensee, which includes relevant information such as management and shareholding structures, their business operations, including the type of networks and services they intend to provide and funding sources for these business operations.

Law stated - 8 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

The Telecoms Law gives the TDRA responsibility for managing and regulating radio spectrum in the UAE. There is no established spectrum trading or leasing practice. The TDRA grants temporary authorisations on application for up to 90 days and such authorisations are specific to the applicant.

In common with many other jurisdictions, the UAE has its National Frequency Plan. This is issued by the TDRA and provides that certain services can only be provided within certain spectrum bands. In practice, the TDRA is known to have shown some flexibility in certain cases where this would not cause interference. All of the 800MHz, 900MHz and 1,800MHz spectrum has been divided between the two mobile operators, which means higher bandwidths can be supported in all frequency bands. Not all the 2,100MHz band is currently licensed and the 3,500MHz band is licensed for fixed wireless access. The fourth updated version of the National Frequency Plan was published in November 2024. It includes the allocation of 600 MHz and 6GHz frequency bands for international mobile telecommunications systems, to support the infrastructure of 'smart cities' and 4IR technologies.

Law stated - 8 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Under the Telecoms Law, the TDRA does have the power to issue ex-ante regulations and decisions concerning practices, as well as to conduct ex-post investigations. Until 2012, it was not uncommon for the TDRA to publish determinations and decisions concerning telecommunications services publicly, including on their website. Since 2012, it appears the regulator has taken the decision not to publish such determinations and decisions publicly but to communicate them only to the relevant entities instead.

The TDRA has a short regulatory policy on ex-ante competition safeguards, which details the various factors it may take into account in assessing competition and dominance in the UAE. The policy provides wide discretion to the TDRA on the factors to be considered and the remedies to be imposed depending on the outcome of an assessment of the level of competition in the relevant market.

Cabinet Resolution No. 56 of 2024, issued in June 2024, sets out several important changes to the regulation of telemarketing, with the aim of regulating the marketing of products of services through telemarketing and reducing unwanted calls to consumers.

Further, Cabinet Resolution No. 57 of 2024 provides administrative penalties to those violating the provisions of Cabinet Resolution No. 56 of 2024 Concerning the Telemarketing Regulations.

Law stated - 8 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

There is currently no directive that imposes structural or functional separation between an operator's network and its services in the UAE.

Law stated - 8 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

It is the responsibility of the TDRA to oversee the provision of telecommunications services throughout each emirate of the UAE and ensure that they are sufficient to meet public demand across the UAE; however, this has not taken the form of a hard

universal service obligation. The TDRA fulfils this obligation via its relationships with the state-backed public telecoms companies who each have references in their licences to financial obligations around universal service obligations; however, these provisions are typically only references back to the general regulatory framework rather than a specific, hard obligation. Etisalat's TDRA licence differs from that of du on the issue of universal service and has a harder obligation that extends to certain services such as dial-up internet services.

The two public telecoms operators, du and Etisalat, have a significant government-ownership interest and have invested heavily in infrastructure and broadband. Given the nature of the duopoly, there are no direct government subsidies.

Law stated - 8 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

Under the Telecoms Law, the TDRA has the authority to control the allocation of telephone numbers and numbering plans. To this end, the TDRA has released a national numbering plan that sets out this approach to number allocation. This includes the numbering regimes used to indicate which emirate the call arose from, as well as reserving certain numbers for the emergency service and premium paid-for calls.

The licensed operators can apply to the TDRA for allocation of a batch of numbers, which is granted based on capacity, future demand, utilisation by the licensee and administrative effort. The TDRA allocates rights to use numbers in continuous blocks of up to 100,000 numbers. The licensed operators are then responsible for allocating the numbers to their subscribers.

At the end of 2013, the UAE implemented a mobile number portability programme. Notwithstanding the mobile virtual network operator or independent branded services, there are only two mobile network operators in the UAE and so the only number portability is between the two. Both networks offer a number porting application form that can be submitted to request a number transfer.

Law stated - 8 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

The TDRA is empowered by the Telecoms Law to represent customer interests in the UAE. This encompasses issuing rules or regulations relating to the terms of supply to the customer and includes consumer protection regulations, such as key terms that must be included in contracts with customers (eg, restrictions on usage and rights to terminate)

and detailed information that must be provided to the customer before the purchase of a service. The TDRA has also issued a consumer protection guide that sets out a customer's rights concerning their service contract, the privacy of information, access to services and several others.

Law stated - 8 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

No specific regulations require net neutrality in the UAE. Both of the public telecoms operators have offered plans with zero rating on certain social media applications.

Bandwidth throttling by internet service providers is common. Network traffic that relates to Voice over Internet Protocol (VoIP) services is often blocked or has its capacity reduced to give partial effect to the TDRA's policy on VoIP services, whereby such services (where there is network breakout) are not permitted unless provided by one of either du or Etisalat.

Law stated - 8 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

There is no specific legislation or regulation concerning digital platforms.

Law stated - 8 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

There are no specific regulations concerning NGA networks. Du and Etisalat are both committed to providing high-speed networks across the UAE, and the UAE has a very high penetration of fibre-to-home connectivity. Given the nature of the public telecommunications duopoly in the UAE, there are no direct government subsidies or financial schemes available.

Law stated - 8 May 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

The UAE issued its first federal data protection law in September 2021 (Federal Decree-Law No. 45 of 2021 Regarding the Protection of Data Protection) (Personal Data Protection Law) that is applicable to all sectors in the UAE, save for free zones like the Dubai International Finance Centre and Abu Dhabi Global Market that have their own data protection regimes. The newly established UAE Data Office will be responsible for regulating the implementation and enforcement of the core data protection concepts such as personal data, controllers, processors and processing, requirements to appoint a data protection officer and subject rights. The new Personal Data Protection Law is conceptually similar to the EU General Data Protection Regulation (GDPR) and will have extra-territorial effect in that it is applicable to organisations established in and outside of the UAE that process personal data of data subjects within the UAE. Despite its similarities to the GDPR, it is noteworthy that the Personal Data Protection Law does not provide for a 'legitimate interests' basis for processing personal data, and so consent will be required unless an exception (eg, public interest, defending a legal claim) applies. Furthermore, there are slightly more onerous obligations to record personal data and the requirement to notify the UAE Data Office of breaches of personal data 'immediately upon becoming aware of them' (as opposed to the lower threshold of 'without undue delay' under the GDPR).

Although the Personal Data Protection Law came into force on 2 January 2022, there was a six-month window of non-enforcement due to pending implementing regulations. The regulations, at the time of writing, remain unpublished thereby creating a significant degree of uncertainty on certain compliance matters.

Law stated - 8 May 2025

Cybersecurity

13 | Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

Key primary legislation relating to cybercrime includes Federal Decree-Law No. 34/2021 Concerning the Fight Against Rumours and Cybercrime (effective 2 January 2022) (the Cybercrime Law) and the Penal Code.

The new Cybercrime Law specifically deals with activities like hacking (this was previously described as unauthorised access), identity theft and fraud, crimes that involve computers, networks and electronic information, impersonation, electronic robots, cryptocurrency and the spreading of false information. The Penal Code consists of general provisions prohibiting various criminal acts, some of which will apply to cybercrime.

The Cybercrime Law applies across all sectors, with no exceptions. In practice, it will be of particular relevance to the telecommunications and financial services sectors, as these are typically entrusted with critical data and therefore more likely to be targets of cybercrime. Furthermore, there are specific implications for the banking, medical, media

or scientific sectors as aggravated penalties will apply if the harm affects the said sectors. The Cybercrime Law also penalises those who spread rumours and fake news as well as those who perpetuate (ie, republish and recirculate) such information that, among others, provokes public opinion and intimidates and harms the public interest.

From a general cyber security compliance perspective, many of the licensing instruments published by the TDRA relating to emerging technology such as the Internet of Things (IoT) emphasise the importance of cyber controls, particularly as regards the active elements of the related radio frequency-dependent infrastructure.

The Signals Intelligence Agency (SIA) is the UAE federal authority responsible for the cybersecurity of the UAE. The SIA operates under the direction of the UAE Supreme Council for National Security. Government organisations, semi-government organisations and business organisations that are identified as critical infrastructure in the UAE are required to follow SIA compliance guidelines. The primary standard to follow for SIA compliance is the UAE Information Assurance Regulations.

The TDRA has also established the UAE's Computer Emergency Response Team, which was established by statute and has published a wide-ranging information security policy.

The UAE National Cybersecurity Council is currently developing several new policies including for cloud computing and data security, IoT security, and cybersecurity operations centres.

Further, sector specific regulators in the UAE who issue certain licences (such as the financial services regulators) impose obligations on businesses that fall within their respective jurisdictions which are focused on cyber security and operational resilience.

Law stated - 8 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

There is no specific federal legislation or regulation in place; however, the emirate of Dubai has introduced the Dubai Law No. 26/2015 (the Dubai Data Law), which provides for local government and private entities to contribute certain non-confidential information relating to the emirate, known as Dubai Data, to a knowledge and database from which such entities can benefit. The intention is to improve integration, harmonisation and efficiency between services and encourage the development of a smart economy through digital transformation.

Law stated - 8 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

The Personal Data Protection Law implements restrictions on transfers of personal data whereby it may only be transferred outside the UAE to limited jurisdictions as determined by the UAE Data Office. If the intended jurisdiction is not deemed to have an adequate level of protection, personal data is only allowed to be transferred outside of the UAE if, among others, the transfers are necessary for the performance of a contract with, or in the interest of, the data subject, the transfers are necessary for establishing a legal claim or the express consent of the data subject is obtained and the transfer does not conflict with the security and public interest of the UAE. These concepts are similar to the ones introduced by the GDPR but have additional considerations of national security issues. The implementing regulations are expected to set out the controls and requirements for these exceptions for transferring personal data to jurisdictions that are deemed to not have an adequate level of protection.

Until the Personal Data Protection Law's proposed implementing regulations are published and come into effect, guidance given by regulators on data domiciliation within the UAE in certain key sectors, including telecommunications, will apply (but this does not come in the form of hard law or publicly available guidance). State-owned entities are also expected to abide by certain data domiciliation rules, which are not set out in hard primary legislation. As the Personal Data Protection Law does not apply to certain free zones, entities registered in the Dubai International Financial Centre or Abu Dhabi Global Market have to adhere to their specific regimes around transfers of personal data that impacts those businesses' freedom to outsource or offshore certain functions.

Law stated - 8 May 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

As there is no expectation that the TDRA will permit any additional public telecommunications service providers to enter the UAE market in the near future, key changes in the market dynamics and regulation are likely to result from increased competition between the two operators. The TDRA has stated previously that the intention behind introducing a second licensed operator was that 'Competition is the drive for development, where it leads to higher quality services, lower prices and the adoption of latest technologies. It is a race that pumps innovation and progress into the veins of the sector.' There is an expectation going forward that the TDRA will be keen to ensure that as much real competition as possible emerges between the operators.

Being considerably newer in its establishment, du has been playing catch-up around the infrastructure and expertise to compete on a truly level playing field with Etisalat. The two providers have often divided regions up geographically rather than competing directly for the same customers, so customers are effectively faced with a service provider with a de facto monopoly. In 2015, the two providers started bitstream access, a method by which the one network could be shared by the two operators, permitting customers more flexibility to choose a provider where the infrastructure previously restricted their choice. Greater ability

for customers to switch between the providers has also been encouraged. It is likely that the TDRA will continue to encourage this competition.

The marked perception of increased competition in the mobile market was increased in 2017 when each of du and Etisalat launched mobile services under new brands: du acquired rights to launch a Virgin mobile branded service and shortly after, Etisalat launched a prepaid service branded as 'SWYP'. Neither the Virgin Mobile nor the SWYP services are regulated independently of their respective MNOs.

Enterprise-focused information and computer technology (ICT) services growth through operator divisions or subsidiaries is a key area to watch, particularly as these divisions will compete with a large pool of non-operator affiliated entities. As regards the ICT services growth being experienced by the operators, enterprise adoption of emerging technology will continue to require regulatory guidance from the TDRA, as well as other concerned regulatory bodies in the UAE, to ensure the balance between advancement in technology and risk management is addressed.

The TDRA has been active in terms of regulatory and policy output covering a range of communications areas including Earth Station Regulations, Space Service Regulations and a new Information Assurance Regulation. One of the most significant developments in light of the various Smart City ambitions in the UAE is the IoT Regulatory Policy, which remains largely untested and has a seemingly broad ambit covering internet of things services.

One of the areas where change is expected is around the move of operations into mobile financial services, fintech verticals focusing on consumer products and services, and the impact of open banking and liberalisation of the financial services sector in the UAE.

The enforcement of the Personal Data Protection Law and its implementing regulations will be a much-anticipated development. Companies will have to be vigilant for the issuance of the implementing regulations by the UAE Data Office as they will then have six months to align and harmonise their internal processes. It will be interesting to see the extent of penalties decided upon via the implementing regulations and their influence on the manner of implementation of the new personal data protection laws of the neighbouring Kingdom of Saudi Arabia that came into force in 2023.

Law stated - 8 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

The principal source of law in relation to the media sector in the United Arab Emirates (UAE) is Federal Law No. 55 of 2023 on the Regulation of Media (the Media Law). The law was issued on 18 December 2023 and came into force on 18 December 2024. The law covers a large number of regulations on the media including ownership, prohibitions on certain types of reporting and defamation. The related implementing regulations, the Cabinet Resolution Concerning the Executive Regulation for Federal Decree-L

aw Regulating the Media (the Implementing Regulations) went into effect on 31 October 2024. The regulations provide detailed guidelines on media activities, licensing procedures, and standards for media content.

Under the previous media law, which dates back to 1980, the Ministry of Culture and Information was the national media regulator. Then in 2006, Cabinet Resolution No. 14/2006 abolished the Ministry and established a new regulator for the media industry, the National Media Council (NMC), which has now been replaced by the Media Regulatory Office (MRO) in 2021 following the merger of the NMC and the Federal Youth Authority. As well as being the regulator, the MRO is tasked to prepare research and foresight studies relating to the media sector and aims to combat false news and unprofessional media practices. Following the enactment of Federal Law No. 57 of 20 22, the UAE Media Council has been established to coordinate media efforts with the National Media Office (NMO) also under its remit.

The Media Law and its Implementing Regulations provided a much-needed update and clarification, especially for ensuring that media activities cover not just traditional media such as books, newspapers and television but also electronic and digital media and video-on-demand services. Wide discretion for the licencing of these new electronic and digital media activities has been provided, in the same way as newspapers and radio and television in the previous law.

The Media Law provides Media Content Standards which must be adhered to by anyone performing a media activity or profession, including duties and prohibitions, for example:

- respect for the Islamic beliefs and other beliefs;
- respect and not to offend the State, the Emirates or their legal, economic, judiciary and security systems;
- not to perform any act that affects foreign relations;
- respect the culture and national identity of the UAE;
- not to publish any offensive content;
- respect the privacy rules and whatever is related to the private life of individuals;
- not to publish any matter that incites to commit crimes or use illegal substances;
- not to publish, broadcast, or share expressions, photos, drawings, or opinions that breach the public morals or that corrupt the morals of the youths; and
- not to publish or broadcast rumours, fake news or falsified papers.

In addition to the Media Law, the UAE has a history of trying to regulate social media influencers. In March 2018, the Electronic Media Activity Regulation Resolution 2018 (the EMR) was published, which regulates a wide range of digital media activities including websites that sell content and individuals who seek to monetise their social media popularity by way of an annual licence arrangement. The National Media Council Circular No. 13/2020 was then issued to further clarify rules on advertisements on social media including the need for the advertisement to use non-confusing language and restrictions on advertising health-related products, drugs and other pharmaceuticals.

There are also relevant provisions relating to media found in the Penal Code, particularly in regard to defamation, and the Cybercrime Law, when considering digital communications.

Across the UAE there are various media-related free zones that have their own civil regimes, while still being subject to the same criminal restrictions as the main jurisdictions. Many national and international media companies are established in these zones.

Law stated - 8 May 2025

Ownership restrictions

18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Under article 4 of the Media Law, the owner of a licensed media publisher or of any means of mass media and publication, must:

- have legal capacity;
- have a good reputation and conduct and not have been convicted of an offence related to morality or dishonesty;
- obtain any necessary approvals from government entities; and
- any other requirements once the implementing regulations have been enacted.

However, if ownership is by a company rather than an individual, the company must also be limited to the practice of media activities. The Implementing Regulations further specify that foreign media offices must appoint a director who is at least 25 years old and holds an appropriate academic qualification, with approval from the competent authority.

Many media outlets are owned, in whole or in part, by the government or prominent local families closely aligned with the government.

There are also certain academic and experience qualification requirements on editors-in-chief and standard writers and journalists, though these are typically not enforced in practice.

The EMR set out requirements of applicants for the licensing regime as well as the mandatory appointment of a ‘responsible manager’ to act as a representative, although breaches of the EMR by an applicant or licensee do not extend to liability on the part of this responsible manager. There is no requirement in the EMR for the responsible manager to be a UAE national.

Law stated - 8 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

Under the Media Law, all practitioners of media activities are required to hold a licence before they can lawfully publish. The Implementing Regulations specify that the UAE Media Council or the competent authority shall review the application for issuing a licence to practise media activities within three working days from the date of its submission, provided that it meets the terms and conditions. Failure to submit a licence renewal application within 90 days from the date of expiry shall result in the automatic cancellation of the licence and the imposition of fines.

Separately from the ownership requirements under the Media Law, article 4 of Cabinet Decision No. 22/2017 on Licensing Media Activities, requires licensees to:

- be a Gulf Cooperation Council (GCC) national;
- not to have been suspended from practising media activities;
- not owe the MRO any dues;
- be at least 25 years of age;
- have a good reputation and conduct and not have been convicted of an offence in relation to morality or dishonesty; and
- have appropriate academic qualifications.

The Implementing Regulations further detail that the application must be submitted through approved electronic means using the designated form, with all required documents and data. The licence applicant must have full legal capacity and be of good reputation and conduct, not having been previously sentenced to imprisonment for a felony or a misdemeanour involving moral turpitude or breach of trust unless rehabilitated.

The proposed new media outlet must apply to the MRO, requesting the granting of such a licence. This can be done online via the MRO's website and must include details of the owner and the proposed media outlet brand. Applications must be in Arabic. The MRO will review the application and, if it is in favour of the licence being granted, will support the application in front of the federal government. The federal government must then approve the application and grant the licence.

The Media Law and its Implementing Regulations provide for an applicant to deposit a guarantee of 50,000 UAE dirhams for an application for a newspaper and 20,000 UAE dirhams for other media outlets to be paid along with the application. Fines imposed will be removed from this deposit, which must then be topped up to maintain its original level. The MRO can also charge a range of service fees ranging from 500 UAE dirhams to 100,000 UAE dirhams, dependent on the type of licence sought and the activities covered.

The EMR also sets out an annual licensing regime for electronic media activities that have variable fees depending on the category of the regulated activity: the most expensive of the categories identified in the EMR is electronic or online accounts and websites, including specialised ones (commercials, advertising, news, etc), which attract a new application processing fee of 15,000 UAE dirhams and the same amount for a renewal.

Law stated - 8 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

There are no specific regulations preventing the broadcasting of foreign-produced programmes, providing that they do not contain any content that is not permitted under the Media Law. The Implementing Regulations require foreign media offices to obtain a licence from the competent authority, specifying the type of media outlet to be represented within the UAE. There are also no official requirements in relation to the minimum amount of local content.

Law stated - 8 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

The Media Law contains restrictions on advertising similar to those found in many other nations, though unlike in jurisdictions that rely largely on self-regulation, advertising standards are enforced by the MRO. The Implementing Regulations prohibit advertisements that contravene media content standards or harm the public interest. Advertisements must be factual, not misleading, and clearly identified as advertising.

In particular, advertisements are prohibited where they are inconsistent with the Media Content standards or are against the public interest. This includes those that are 'inconsistent with public conduct', a phrase capable of covering a broad range of cultural sensitivities including inappropriate dress or behaviour. It also prohibits adverts that mislead the public, could cause harm to the state or the value of society or contain subversive ideas.

The Implementing Regulations further specify that advertisements must not include incorrect or misleading claims, exaggerations, or any content that may be construed as fraudulent or deceptive. Advertisements must be clearly identified and distinct from other editorial and media content.

The Media Law also requires advertisers to make clear that their material is clearly and explicitly noted as advertising.

The MRO issued an official advertising guide in 2018, which consolidates various principles on advertisements in the UAE and protects local religious, cultural and social values and improves the freedom of expression of the media.

The EMR addresses electronic advertisements, including the use of digital social media and imposes a broad licensing requirement on those involved in such online advertising.

The Telecoms and Digital Government Regulatory Authority (TDRA) Consumer Protection Regulations also contain restrictions on the advertising of products or services regulated under Federal Law No. 3 of 2003 Regarding the Organisation of the Telecommunications Sector. These include the requirement to be able to evidence to the TDRA's satisfaction

of any statements or claims made in the advertisement, whether direct or implied and restrictions on the form of comparative advertising.

Federal Law No. 15/2020 on Consumer Protection also prohibits misleading advertisement whether it relates to the price or the description of the goods. Furthermore, advertisements related to consumers shall be made in Arabic (with other languages being able to be made in addition to Arabic).

Article 20 of 2024's Federal Decree by Law Concerning Media Regulation further regulates promotion and advertising, strengthening consumer protection.

Law stated - 8 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

No, there are no official must-carry obligations in the UAE. In line with the requirements on the media not to insult or harm the state and for official news reporting to be undertaken through a centralised, state-controlled function, certain state media content will sometimes unofficially be required to be included as part of the schedule. Also, local broadcast media channels will observe mourning content (eg, soft music or recitation of the Holy Quran) in circumstances where there has been a death of a royal or some other nationally observed tragic event.

Law stated - 8 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

There is no distinction in the Media Law between different types of media content according to their delivery. The Implementing Regulations extend media content standards to digital content and require adherence to the Age Rating System approved by the UAE Media Council. In July 2017, the UAE Cabinet issued Resolution No. 23 of 2017 concerning media content consolidated content rules and extended these specifically to digital content and then, more recently, the EMR established a licensing and compliance framework for digital media (including licensure relating to social media 'influencers').

On 9 September 2020, the MRO issued National Media Council Circular No. 13/2020, a circular regarding social media advertisements emphasising the need to obtain prior approval from the Media Licensing Department. This will impact companies, brands, influencers, and anyone who carries out social media advertising activities on a commercial basis. Furthermore, the circular sheds more light on the regulation of advertising on social media including the need for the product to be authentic and not exaggerated and not

cause confusion with other similar names. The identity of the advertisement must be clear and distinctive from other materials presented – for example, phrases like 'paid advertisement' as opposed to 'in collaboration with' should be used to make it clear whether the advertisement is commercial or not.

Ultimately, the fundamental principles behind the UAE's regulation of traditional media and the UAE's regulation of new media are not different.

Law stated - 8 May 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The switchover from analogue to digital broadcasting was completed in 2012, coordinated with other GCC states such as Qatar and Saudi Arabia.

Additional radio capacity was allocated to improve mobile telephone services.

Law stated - 8 May 2025

Digital formats

25 Does regulation restrict how broadcasters can use their spectrum?

No, there is no regulation that restricts how broadcasters are permitted to use their spectrum allocation.

Law stated - 8 May 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

There is no official assessment or regulation of media plurality in the UAE. Many media service providers are owned or part-owned by the UAE government or members of prominent local families closely linked to the government.

The MRO oversees the content prepared by the media and any material that is considered to be undesirable is likely to be blocked. Particularly in a commentary in relation to the state, foreign affairs or Islam, journalists are likely to self-censor and a similar position will typically be taken across all media outlets. On controversial or sensitive issues, journalists will often take their lead from the single official government news agency, the Emirates News Agency operated by the MRO, and adopt identical reporting positions.

Law stated - 8 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

The rise of social media has spurred a slew of regulations looking to regulate this area and stop the spread of misinformation. Even the Cybercrime Law that came into force in January 2022 provides more protection against online crimes committed via social media networks and IT platforms. For example, the Cybercrime Law now penalises taking pictures of others without permission and also photographing victims of accidents or disasters and spreading the same. As social media becomes more integrated into everyday life, the increased regulatory scrutiny and enforcement of such laws will be one to watch in the coming years.

The Implementing Regulations for the new Media Law, which came into effect in October 2024, provide detailed guidelines on media activities, licensing procedures, and standards for media content. These regulations have amended or replaced several previous regulations, ensuring that media activities cover not just traditional media but also electronic and digital media and video-on-demand services

Law stated - 8 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The communications and media sectors are regulated by the Telecoms and Digital Government Regulatory Authority (TDRA) and the United Arab Emirates (UAE) Media Council and Media Regulatory Office (MRO), respectively. Given the convergence in the sector, there is some overlap between these and indeed other UAE regulators and their respective jurisdictions. As the communication and media sectors include embedded payment propositions for consumer services, the regulatory jurisdiction of financial services regulators (including the Central Bank of the UAE) can also be triggered.

With regard to competition, the UAE adopted a new competition law in the form of Federal Law No. 36 of 2023 on the Regulation of Competition (the Competition Law) replacing the 2012 law. The Competition Law has been in force since December 2023; however, the implementing regulations have not yet been published. Therefore, the previous law's executive regulations (Council of Ministers' Resolution No. 37 of 2014) and two relevant

resolutions (the Resolutions), which provided key thresholds and definitions, remain in effect.

The previous competition law provided for a Competition Regulation Committee (the Committee) to be established to oversee general competition law policy in the UAE and this remains in effect. Day-to-day enforcement of the Competition Law is the responsibility of the Ministry of Economy, acting through its Competition Department. To date, there have been no officially publicised cases of Competition Law enforcement, although we are aware that the Competition Department has been established and issued views on specific cases that have been brought to it (in particular, with regard to merger control notifications).

The Competition Law provides that its provisions shall be enforced on all businesses in relation to their economic activities or the effect of their economic activities in the UAE (even where the conduct takes place outside of the UAE). It is as yet unclear how the courts will react to any jurisdictional disputes.

Unlike under the previous law, the telecommunications sector is no longer specifically excluded from the remit of the Competition Law. However, exemptions remain in cases where other law already governs the competition of that sector or the Minister decides that other criteria relating to economic development or growth are fulfilled. The Telecoms Law stipulates that the TDRA shall have the competence to issue regulations, instructions, decisions and rules regulating and ensuring competition in the telecommunications sector. The TDRA includes terms in the licences issued to operators requiring them not to participate in anticompetitive practices.

Law stated - 8 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

Decisions of the Competition Department can be appealed directly to the Minister of Economy within 15 days of the applicant becoming aware of the decision. Such appeals will be considered by the Committee, which will submit recommendations to the Minister within 10 days. The Minister must then respond to the applicant within 30 days of the appeal being filed; if nothing is heard in this time, the decision is deemed to be rejected. After this, the only remaining appeal is to a court of law (which must take place within 60 days of the decision or the deemed decision).

Licencing decisions issued by the UAE Media Council and the MRO may be appealed directly to the Director-General of the UAE Media Council within 15 days of the date of notification. The Director-General must then respond to the applicant within 30 days of the appeal being filed. Following that, the only remaining appeal is to a court of law. Decisions by the MRO under Federal Law No. 55 of 2023 on the Regulation of Media and the Executive Regulation for Federal Decree-Law Regulating the Media do not currently have an option for appeal, but may also be appealed through the courts.

Law stated - 8 May 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

The key concepts in the Competition Law include a prohibition on anticompetitive agreements, a prohibition on any abuse of a dominant position and merger control. Anticompetitive behaviour is broadly similar to the regimes in jurisdictions with more developed competition law systems, such as Europe and the United States. The new law has tightened controls on economic concentration and market dominance, with the threshold for dominance being altered to be determined by the Ministers (which has not been published yet). Additionally, mergers or joint ventures of a certain size must now be pre-notified to the relevant government ministry at least 90 days before completion (instead of 30 days).

The Competition Law also provides for the issue of individual exemptions for businesses in relation to particular agreements or practices where this is considered appropriate, which can be obtained by application to the Ministry's Competition Department.

It remains to be seen how the Competition Law will be implemented in practice and whether there will be consistency in approach. Once the Competition Department and Competition Regulation Committee begin to make decisions and recommendations, it is unlikely that these will be available to the public. The Competition Law specifically requires the Competition Department to take steps to maintain the confidentiality of information provided by the parties, which is considered confidential. Accordingly, trends in this context will not be easy to be identified through conventional research; however, as market consolidation and convergence in the sector take effect, the approach taken by authorities will be easier to comment on.

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Law stated - 8 May 2025

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COMMUNICATIONS POLICY

Regulatory and institutional structure

1 Summarise the regulatory framework for the communications sector. Do any foreign ownership restrictions apply to communications services?

Communications law and regulation in the United Kingdom is principally founded on the Communications Act 2003 (CA 2003). This legislation implemented several EU laws aimed at harmonising, simplifying and increasing the usability of telecoms regimes across all EU member states. The Electronic Communications and Wireless Telegraphy (Amendment etc) (EU Exit) Regulations 2019 and the Broadcasting (Amendment) (EU Exit) Regulations 2019 were made on 12 February 2019 and came into force on 31 January 2020, both of which amended certain deficiencies within CA 2003 and addressed implications of Brexit. Additionally, the United Kingdom implemented Directive (EU) 2018/1972 (the European Electronic Communications Code) (EECC) through the Electronic Communications and Wireless Telegraphy (Amendment) (European Electronic Communications Code and EU Exit) Regulations 2020, which were made on 2 December 2020 and came into force on 21 December 2020. The EECC replaced the previous EU authorisation directives, but the authorisation regime remained largely unchanged.

CA 2003 grants authority to the Office of Communications (Ofcom), the UK's national regulatory authority for communications. The role of Ofcom is to set and enforce regulatory rules in all sectors for which it is responsible and, along with the Competition and Markets Authority (CMA), to promote fair competition across the industry by enforcing competition laws. As part of Ofcom's regulatory principles, Ofcom must take the least intrusive approach to intervention and will only do so where the intervention would be evidence-based, proportionate, consistent and transparent.

Although Ofcom is accountable to Parliament, the Department for Culture, Media and Sport, is the UK government department with overall responsibility for developing the telecoms regulatory framework within the United Kingdom. Ofcom is restricted to acting within the powers conferred on it by Parliament.

Ofcom's 2025–2026 Plan of Work outlines four main priorities for the coming year, and how the delivery of such priorities will be supported by various projects and programmes that Ofcom will run during the course of 2025–2026. These four areas are:

- 'Internet and post we can rely on' – including ensuring that UK consumers have access to high-quality full-fibre and gigabit-capable networks, along with appropriate security and resilience measures to protect such demand. A particular note was given to how this aligns with the Telecoms Access Review 2026–2031 (TAR 2026–2031), that is going to conclude in 2025 and will set the regulatory framework for the communications sector in the UK during the period 2026–2031, and how ensuring the availability of digital infrastructure is central to this;
- 'Media we trust and value' – including ensuring continued access to broadcast and on-demand media, along with appropriate protections against harmful content being presented on such platforms. A particular note was given to ensuring access to trusted, duly accurate and duly impartial broadcast news;

- 'We live a safer life online' – including establishing the foundations of the regime imposed under the Online Safety Act 2023 (OSA), and starting to put in place the additional regulatory requirements for those that fall under 'categorised services' under OSA. A particular note was given to ensuring that, within this framework, children are appropriately protected online; and
- 'Enabling wireless in the UK economy' – including ensuring that radio spectrum remains an enabler for wireless services in the UK, not only in the commercial market, but also in the public sector (for emergency services, armed forces, etc). A particular note was given as to how this will involve meeting greater demand in the market, and that Ofcom will appropriately apply flexible authorisation processes and encourage a greater degree of sharing between users.

The Ofcom Plan of Work broadly aligns with the UK government's Draft Statement of Strategic Priorities for online safety, published on 20 November 2024, which outlined the following priorities for 2025: safety by design; transparency and accountability; agile regulation; inclusivity and resilience; and technology and innovation. What we see then, are overlapping themes of safety in content, resilience of infrastructure and the applicability of agile regulation in order to encourage an active and competitive market.

The UK government implemented a ban on the purchase of Huawei 5G equipment by UK operators (after 31 December 2020) and a requirement that all Huawei equipment be removed from 5G networks (by the end of 2027) through the Telecommunications (Security) Act 2021 (TSA 2021), which came into effect on 1 October 2022. TSA 2021 replaced sections of CA 2003 and provides for a duty to take security measures, allowing for the UK government to prohibit or restrict communications providers from using goods, services or facilities on national security grounds. There are also new duties on the provider to inform users of a security compromise.

The implementation of the powers under TSA 2021 involved the UK government marking Huawei with a 'Designation Notice' on 13 October 2022, and simultaneously releasing an accompanying 'Designated Vendor Direction', that was both published online and directly sent to 35 public communications providers. This contained a series of 12 specific requirements around the use of the goods and services of the 'Designated' Huawei group.

Ofcom published a follow up statement on 12 December 2022, which outlined the procedures it expects to follow in carrying out its monitoring and enforcement activities under CA 2003, as amended by TSA 2021. The statement contains general guidance about which security compromises providers would be expected to report to Ofcom and how to do so. Further to this, the UK government then published the 'Monitoring direction' that it had issued to Ofcom on 31 October 2023, which outlined the specific role and duties that had been assigned to Ofcom in order to enforce the Huawei 'Designated Enforcement Direction' under TSA 2021. In particular, this noted how certain public communications providers had been designated as 'Relevant Service Providers', and that Ofcom was now responsible for obtaining regular reporting information from said providers in order to ensure ongoing compliance with the 'Designated Vendor Direction'.

The National Security and Investment Act 2021 (NSIA 2021), which came into effect on 4 January 2022, reformed the UK government's ability to scrutinise foreign investment in, among other things, the communications and data infrastructure sectors. If an acquisition of a company falls within communication or data infrastructure (two of the 17 sectors called

out in NSIA 2021) then NSIA 2021 may apply, granting the Cabinet Office (acting through the Investment Security Unit) powers to scrutinise and review the transaction if one of the 'mandatory filing' trigger events occurs where a threshold of 25, 50 or 75 per cent of votes or shares in a qualifying entity is hit or passed through, or where there is the acquisition of voting shares that prevent the passage of a resolution governing the affairs of the qualifying entity. A voluntary NSIA 2021 filing is also potentially required where material influence is acquired over a qualifying entity, or control acquired of a qualifying asset. A telecoms service provider could fall within the definition of a qualifying entity if it is carrying on activities in the United Kingdom or supplying goods and services to the United Kingdom. If NSIA 2021 applies, companies must either make a mandatory notification or can make a voluntary notification to the Investment Security Unit. The Secretary of State will review the transaction and can either approve, approve with conditions or prohibit the entities from completing the acquisition.

On 21 May 2024, the UK government published updated guidance and resources related to NSIA 2021, including a new 'section 3 statement' on the exercise of the call-in power and guidance on compliance and enforcement. Key updates include:

- Section 3 statement: An updated statement outlines when the Secretary of State is likely to exercise the power to call in acquisitions for scrutiny, detailing the factors considered to protect national security.
- Guidance on compliance and enforcement: New guidance provides information on compliance with NSIA, including notices, orders, offences, and enforcement actions, emphasising the importance of adherence to the Act.
- Notifiable Acquisition Regulations: The first statutory review of the Notifiable Acquisition Regulations has been completed, with findings published to refine the system.
- Call for evidence response: The government has responded to a call for evidence, outlining future work to enhance the effectiveness of NSIA.
- Market guidance: Additional information is provided on the application of NSIA to the higher education sector and other topics, ensuring clarity for stakeholders.
- Outward Direct Investment: New guidance notes that NSIA may apply to outward direct investment by UK investors, expanding the scope of scrutiny.

On 19 December 2024, the UK government published its first statutory review of the notifications that are applicable under NSIA 2021. In its conclusions, it noted that it felt the system was currently working well and that its objectives were being met, but did conclude that it would continue to keep these notifications under review.

Law stated - 1 May 2025

Authorisation/licensing regime

2 | Describe the authorisation or licensing regime.

The general authorisation regime under CA 2003 makes no distinction between fixed, mobile and satellite networks and services. All electronic communications networks

(ECNs), electronic communication services (ECSs) and associated facilities (AFs) fall under the scope of CA 2003, irrespective of the means of transmission. Moreover, under the general authorisation regime, there is no requirement for specific licensing of ECNs, ECSs and AFs, provided they comply with Ofcom's General Conditions.

The broad definition of ECNs to include any transmission system for the conveyance of signals between a transmitter, a medium and a receiver, by use of electrical, magnetic or electromagnetic energy, is in line with the EU's overarching principle of technology neutrality. Equally widely defined, an ECS is an internet access service that has as its principal feature the conveyance of signals through an ECN, excluding content services (the provision of material such as information or entertainment). Under CA 2003, an AF is a facility, element or service that is, or may be, used to enable the provision of an ECN or ECS or other services on that network or service, or supports the provision of such services.

ECNs or ECSs can provide networks or services to the public without the need for prior authorisation from Ofcom where they have complied with the General Conditions of Entitlement (the General Conditions). ECNs or ECSs may, however, need a licence in relation to the particular network or service that they are operating.

The General Conditions continue to receive regular updates from Ofcom, and a copy of the most recent unofficial consolidated version can be found on its website, along with a log of changes and accompanying statements that explain any historical amendments. The most recent edition of the unofficial consolidated version of the General Conditions was published on 22 April 2025, which reflects recent changes to General Condition B.1 in order to implement bans on 'Global Title' leasing arrangements, or the use of 'Global Titles' that have already been created from sub-allocated numbers, that were coming into force that day.

There are currently 17 General Conditions in force, the majority of which must be complied with by all ECNs and ECSs. The remainder apply in more limited circumstances, such as for public pay telephones. Under CA 2003, Ofcom has the power to amend or revoke any of the General Conditions as appropriate. For example, in the recent update on 1 February 2025, Ofcom removed references to the Phone-Paid Services Authority and modified the language of Conditions C2.11 and C2.12, along with the overarching definitions, to reflect the fact that Ofcom has taken over the regulation of premium rate phone services in accordance with the Regulation of Premium Rate Services Order 2024 (PRS Order).

In the smaller number of cases where an ECN or ECS is subject to specific conditions, Ofcom will notify that provider of the fact that those conditions are to be imposed. The General Conditions apply to ECNs irrespective of whether a provider owns or rents some or all of the network in question. The ECS will generally be the entity with a direct contractual relationship with the end user, or the reseller or other intermediary in the case of a wholesale provider. Ofcom provides further guidelines on which organisations will fall within these categories.

ECSs expressly include internet access services, interpersonal communications services (differentiated into number-based or number-independent) and services consisting wholly or mainly in the conveyance of signals. Number-independent interpersonal communications are not subject to the General Conditions as they 'do not benefit from

the use of public numbering resources and do not participate in a publicly assured interoperable ecosystem'.

Entities using radio spectrum, such as mobile network operators or satellite service providers, will require the grant of a licence from Ofcom under the Wireless Telegraphy Act 2006 (WTA 2006). Each grant will detail the specific frequency, use, fees and duration of the licence. Some services, such as receive-only earth stations, may not fall within the scope of the WTA 2006 licence condition, but still require Ofcom to authorise any such use under a scheme of recognised spectrum access. Operators of set-top boxes that convert signals for viewing will also need an operating licence under the Broadcasting Act 1996. The use of certain frequencies in the radio spectrum for short-range devices, such as alarms and radio frequency identification equipment, is exempt from the need to obtain licences. On 17 January 2025, Ofcom launched a consultation on updating and changing the relevant equipment licence exemptions. The consultation proposes a range of changes that Ofcom primarily groups as either: harmonising conditions for use with other countries; or exemptions that can be identified through Ofcom's own simplification of its programme of work. For completeness, the processes for obtaining licences for amateur users is handled separately, and an upgraded platform for doing so, Licensing Platform Evolution 3 (LPE-3) was launched on 7 April 2025.

Ofcom's approach to spectrum award is to allow the market as much flexibility in how the spectrum is used without assigning it to a particular technology or application. While spectrum licences are most commonly awarded via auction, Ofcom can design these in such a way as to ensure that there is the greatest possible competition within the market. In March 2022, Ofcom released its Spectrum Roadmap, which was subsequently updated on 10 November 2022, to outline the work that Ofcom plans to do to deliver on the strategy to manage the UK's spectrum. There are three key themes:

- network evolution and divergence;
- accelerating innovation and sharing with spectrum 'sandboxes'; and
- better data for better spectrum management.

The UK's latest auction by Ofcom was for spectrum to service 5G in April 2021. Ofcom has since announced in 2024 that it is planning to auction further licences to use spectrum in the 25.1–27.5 GHz and 40.5–43.5 GHz bands in certain parts of the country, primarily to enable the use of new services, including 5G mobile services. Following the CMA's approval of the Vodafone and H3G merger in December 2024, Ofcom announced that it was planning to host these auctions in September 2025, and published an updated version of the process guidance for such in March 2025.

Licence duration

Licences issued by Ofcom under WTA 2006 have varying durations depending on the type of licence granted. The mobile 3G licences granted in 2000 were subject to a fixed term of 20 years. Following the WTA (Directions to Ofcom) Order 2010, and subsequent consultation by Ofcom, mobile licences will continue for an indefinite period but be subject to annual renewal fees. ECNs and ECSs under the general authorisation regime are not subject to licensing requirements and, therefore, there is no set licence duration applicable to the provision of ECNs and ECSs.

On 11 January 2024, Ofcom published its response to the UK government's invitation to review its market-based approach to mobile spectrum management. Amongst other topics, Ofcom was invited to consider its current approach to the duration of licences granted. Following analysis of its own practices and comparison to the practices used in other European countries, Ofcom announced that it was planning on changing its approach, and that the licences being auctioned in its upcoming September 2025 auction will be for a fixed term of 15 years, and will then be reallocated.

Modification of licences

Although ECNs and ECSs will not be subject to any direct licence modification, under CA 2003 Ofcom may impose changes to the General Conditions or specific conditions from time to time. CA 2003 requires that Ofcom publish a notice, outlining the proposed changes and justifying its reasons for these, providing a period for proposals from those providers affected of not less than one month. Variations to significant market power (SMP) conditions are subject to additional requirements, including that Ofcom must consider all representations made to it about the proposal and have regard to every international obligation of the United Kingdom as notified to it by the Secretary of State. Licences under WTA 2006 may be varied by Ofcom providing written notice to the licence holder or publishing a general notice to all holders of a class of licence.

Fees

Under the Digital Economy Act 2017 (DEA 2017), Ofcom is entirely funded through industry fees and charges. Communications service providers (with a revenue of more than £5 million) must pay a fee based on 0.0788 per cent of relevant turnover for the year ending 31 December 2023. Operators that have Code powers under the Electronic Communications Code (conferring benefits such as not having to apply for a street works licence to install certain equipment) must also pay an annual fee to Ofcom. The charge for 2025–2026 is £1,000. Operators must also pay a one-off charge of £10,000 for Ofcom's cost of dealing with the application for Code powers.

Radio communications

Ofcom has the power under WTA 2006 to set fees concerning wireless telegraphy licences, other than for those awarded by auction. Under WTA 2006, Ofcom can prescribe administered incentive pricing, allowing for fees to be set at above administrative costs to encourage efficient use of the spectrum. Ofcom must set out the fees through published regulations. Ofcom can either update existing regulations or publish new ones. Most recently, the Wireless Telegraphy (Licence Charges) Regulations 2020 came into force on 21 October 2020.

On 13 December 2024, Ofcom launched a formal review of its annual licence fees, and laid out proposals for revised fees for licence holders in the 900, 1,800 and 2,100 MHz spectrum. This included reducing the fees charged for licence holders in the 900 and 1,800 MHz spectrum by 21 per cent, and increasing the fees charged for licence holders in the 2,100 MHz spectrum by 12 per cent, resulting in a net reduction of fees paid of circa £40

million. The closing date for responses to these proposals was 7 March 2025, and Ofcom is planning to release a statement in response in Q3 of 2025.

Television and radio

Ofcom also charges licence fees for the radio and television sectors. The percentage of annual turnover payable varies according to the turnover of the operator or the operator is charged a flat fee, depending on the particular licence that they hold.

Public wi-fi

The Investigatory Powers Act 2016 (IPA 2016) applies to public Wi-Fi providers, which may result in them being required to retain and disclose communications data to authorities.

Law stated - 1 May 2025

Flexibility in spectrum use

3 Do spectrum licences generally specify the permitted use or is permitted use (fully or partly) unrestricted? Is licensed spectrum tradable or assignable?

In its 2022 Spectrum Roadmap Management Strategy statement, Ofcom highlighted the importance of providing as much flexibility as possible in spectrum licence conditions to liberalise the rights of the licensee, allowing that user to re-purpose the use of its spectrum without needing to seek a licence variation.

Ofcom's 2022 statement set out three access licences for the use of spectrum. First is a Technically Assigned licence that allows Ofcom to coordinate the individual assignment of frequencies within the band. This will be granted where various users apply to use the same spectrum and where failure to coordinate licensed users may result in harmful interference. Second are light licences that are available on request and do not require any assignment or coordination by Ofcom, which will be available where there is limited risk of interference between different users. Finally, there are block-assigned licences that provide access to a block of specific spectrum within a geographical area, and licensees then manage spectrum use within the block. These are generally awarded by auction. Defining interference parameters remains an important tool for allowing licence owners to understand how they can use their own network and the possible interference levels they may experience.

Alternatively, there is the licence exemption for radio equipment if its installation or use is not likely to result in undue interference to other radio equipment. A user will not need a licence if their device complies with specified technical parameters, which means that most mass-market consumer devices are licence exempt.

Spectrum trading

Spectrum trading is allowed in the United Kingdom, with the prior consent of Ofcom only required for the trading of mobile licences. The laws governing such trading are:

- WTA 2006;
- the Wireless Telegraphy (Spectrum Trading) Regulations 2012; and
- the Wireless Telegraphy (Mobile Spectrum Trading) Regulations 2011 (the Mobile Trading Regulations).

The parties to the transfer must notify Ofcom with certain information about the trade before Ofcom can then publish a notice setting out information on the trade and basic details about the licence. For mobile transfers, Ofcom must consent to the transfer, possibly giving further directions to the parties. Certain types of partial transfers are also permissible under the Mobile Trading Regulations, although these may be restricted to limit the number of available licences in the band. Ofcom produced its guidance on spectrum trading in March 2020, which provides further details.

On 31 October 2024, Ofcom launched a consultation paper that included proposed changes to Ofcom's existing spectrum trading and register rules. Amongst other things, this outlined proposed changes that would extend the ability to transfer rights and obligations through spectrum trading to include 'shared access' licences and 'point-to-point fixed links' licences, within certain frequency bands and under certain circumstances. Ofcom has announced that any new rules will come into force 21 days after its final statement is published – anticipated to be some time in Spring 2025.

Law stated - 1 May 2025

Ex-ante regulatory obligations

4 Which communications markets and segments are subject to ex-ante regulation? What remedies may be imposed?

Ofcom has powers to impose ex-ante regulations on markets where that market is found not to display effective competition. Under these ex-ante regulatory powers, Ofcom may impose certain SMP conditions on a communications provider where that provider is deemed to have SMP such that it can dominate a market, namely, it has a position of economic strength affording it the power to behave to an appreciable extent independently of competitors, consumers and customers. The EECC requires that Ofcom carries out market reviews to establish the level of competition before any SMP regulation can be imposed. If a market is found effectively competitive (namely, no operator has SMP), taking into account changing market conditions, no regulation can be imposed. Ex-ante regulation must be removed when the market has become effectively competitive. In 2002, the European Commission published guidance on how national regulatory authorities (NRAs) should approach imposing SMP conditions on a provider. These were updated in 2018 to reflect the changes to EU competition law generally as well as changes to the telecoms sector.

Under the EU framework, the European Commission identified the set of markets in which ex-ante regulation may be warranted. In its Recommendation on Relevant Markets, adopted on 21 December 2020, only the following markets were identified:

-

wholesale local access provided at a fixed location (to ensure access-based competition in the broadband mass market); and

- wholesale dedicated capacity (which is mainly relevant for business use requiring a higher quality of connectivity).

As the UK NRA, Ofcom is required to carry out SMP assessments and review and report on existing SMP determinations every five years. Since 31 December 2020, Ofcom's decision-making concerning SMP markets and related conditions is no longer subject to EU oversight.

The current position on SMP markets in the United Kingdom is as follows.

Business connectivity markets

On 28 June 2019, Ofcom published the final statement and concluded that it will continue to regulate what Openreach can charge providers to use their leased-line networks and imposed requirements on Openreach for repairs and installations. Openreach will also be required to give competitors in certain areas physical access to its fibre-optic cables.

Physical infrastructure market

On 28 June 2019, Ofcom decided on regulation that will allow all telecoms providers access to Openreach's network of underground ducts and telegraph poles.

Wholesale fixed telecoms market (Hull)

The Ofcom consultation published in July 2020 setting out regulation plans for five years from April 2021, including proposals to remove regulation from the wholesale fixed analogue exchange line, integrated services digital network 2 and 30, wholesale call origination and wholesale broadband access markets. Regulation to remedy KCOM's SMP will continue.

Wholesale fixed telecoms market

The Ofcom statement published on 18 March 2021 continues to allow all network operators access to Openreach's network of underground ducts and telegraph poles. Depending on local competition, Openreach may continue to be required to provide wholesale access to its network or be subject to a cost-based charge control. Ofcom did not impose price caps on full-fibre connections provided by Openreach.

On 26 March 2024, Ofcom initiated a review that will apply to the UK fixed telecoms markets from April 2026 until March 2031, known as the TAR 2026–2031. On 20 March 2025, Ofcom published for consultation its initial set of policy proposals for the UK fixed telecoms market for this period of five years. As part of this pack, in volume 2, Ofcom outlined its proposed approach for market definition and SMP assessment as part of this process, with the proposed remedies (in the event of finding an SMP) outlined in volumes 3–6. Entities have until 12 June 2025 to respond. Ofcom has noted that it will consider all the feedback

received in response to this consultation, before publishing a statement containing its final decisions in early 2026.

Wholesale voice market

The Ofcom statement published on 30 March 2021 states the decision to deregulate wholesale call origination and remove mobile donor conveyance charges price cap, although these continue to be required to be set at cost. Regulation and charge controls on mobile call termination and wholesale call termination were retained. New internet protocol interconnection regulations were introduced.

Law stated - 1 May 2025

Structural or functional separation

5 Is there a legal basis for requiring structural or functional separation between an operator's network and service activities? Has structural or functional separation been introduced or is it being contemplated?

In 2005, BT gave binding undertakings to Ofcom under the Enterprise Act 2002 (EA 2002) under which it agreed to implement a functional separation of its network division – Openreach – from the rest of the BT group. Organisational boundaries and information barriers comprised the basis of this functional separation, with Openreach obliged to deliver products providing access to the first-mile infrastructure to all communications providers on a non-discriminatory basis.

The status and operation of Openreach was reviewed in 2016 with Ofcom considering proposals, including retaining functional separation with increased independence of Openreach's governance, along with stricter access and quality requirements for Openreach (following several criticisms levelled at BT alleging abuse of the Openreach monopoly, underinvesting in the UK's broadband infrastructure and charging high prices with correlating poor customer service). Following Ofcom's announcement of its intention to file a formal notification to the European Commission to commence the separation process, in March 2017, BT Group agreed to implement a legal separation of Openreach from the BT group. On 31 October 2018, Ofcom published a notice confirming that BT was released from its EA 2002 undertakings given in respect of Openreach. Ofcom continues to monitor Openreach's strategic independence to ensure that the separation is operating in practice. If Ofcom is not satisfied that this separation does not work, a further option would be a structural separation that would see Openreach being completely separated from the BT Group.

Ofcom published its most recent such Annual Monitoring Report on 11 September 2024. In this report, though Ofcom noted that it had received some reported breaches of the voluntary commitments made by BT in 2017 regarding the strategic independence of Openreach from the BT Group, it had not seen enough evidence to warrant opening any new formal investigations during the relevant period. Indeed, Ofcom noted that it had continued to see evidence that these commitments were continuing to work as

intended, and that they were well-established and well-embedded throughout both BT and Openreach.

Furthermore, following Ofcom's open letter to industry associated with Openreach's fibre build in 2022, Ofcom reiterated in this latest Annual Monitoring Report that it had found no evidence that Openreach was targeting competitors or making decisions that were not commercially rational.

In this report, Ofcom also noted that it had finished its own investigation into Openreach's compliance with quality of service standards for certain markets in 2022/2023; and that though it had found that Openreach was in breach of three of the standards that Openreach had been directed to meet in that period, Ofcom had decided not to impose a financial penalty given broader consideration of the particular circumstances and the steps taken by Openreach to comply with quality of service standards.

Law stated - 1 May 2025

Universal service obligations and financing

6 Outline any universal service obligations. How is provision of these services financed?

The law on universal service provision is partly derived from Directive 2009/136/EC (Universal Service Directive), which was incorporated into the EECC and implemented in the United Kingdom on 21 December 2020. Under the Electronic Communications (Universal Service) Order 2003, BT and KCOM, the designated Universal Service Providers in the United Kingdom, must comply with conditions aimed at ensuring the provision of universal service. The obligations include:

- special tariff schemes for low-income customers;
- reasonable geographic access to public phone boxes;
- a connection to the fixed network (including functional internet access); and
- the provision of a text relay service for customers with hearing impairment.

DEA 2017 established a power for the Secretary of State to include a broadband universal service obligation (USO) for a legally binding minimum level of broadband service with a connection of at least 10Mbps download speed and upload speeds of at least 1Mpbs by giving each household and business a new legal right to demand an affordable broadband connection up to a reasonable cost threshold. This was implemented through the Electronic Communications (Universal Service) (Broadband) Regulations 2018, which came into force on 4 December 2018. Ofcom designated BT and KCOM (in Hull) as the universal service providers to which broadband conditions are to apply. With the Broadband Delivery UK programme having brought fixed-line superfast broadband to more than 96 per cent of the United Kingdom, the 2018 USO is geared towards achieving the final 4 per cent.

Customers have the right to request an affordable broadband connection from BT or KCOM including requesting an upgraded connection should it not reach a download speed of

10Mbps and an upload speed of 1Mbps. If customers only have access to a service that is priced over £56.20 per month, there is the right to request a universal service connection.

The relevant provider will have 30 days from the request to confirm whether the customer is eligible. The customers will be eligible if their property does not already have access to affordable broadband and is not due to be connected by a publicly funded scheme within 12 months. The costs of providing connection will be paid for up to £3,400. If the required work costs more, the customers will have an option to either pay the additional costs or seek an alternative solution outside the universal service. Customers will pay the same price as anyone else on the same package, and this will be no more than £56.20 a month. Most people will get a connection within 12 months, but it may take up to 24 months.

The Electronic Communications (Universal Service) (Costs) Regulations 2020, which came into force on 15 June 2020, set out how universal service providers BT and KCOM will be compensated, including Ofcom rules for assessing the extent of the financial burden associated with the provision of universal services.

Law stated - 1 May 2025

Number allocation and portability

7 Describe the number allocation scheme and number portability regime in your jurisdiction.

Under retained EU law, end users have a right to keep their original telephone number when switching communications providers. Under its powers under CA 2003, Ofcom has laid out the conditions for number portability under General Condition B3. An end user's original service provider must provide them with a porting authorisation code in the shortest possible time when requested. The end user may then pass this code to a new provider and the porting must then take place within one business day.

In relation to mobile customers they can leave their network by sending a short, free text message without needing to call their existing provider. Ofcom has also banned mobile providers from charging for a notice period that runs after the switch date.

If a customer's request to port their number is being frustrated, the old provider will be put on notice and will have up to five days to resolve any issues. If it fails to do so, the customer has the right to trigger the process that will enable their new provider to override this obstacle. The customer will need to submit a complaint on Ofcom's website, which will be assessed by an independent industry panel.

Ofcom introduced a 'One Touch Switch' (OTS) process which established revised processes that residential landline and broadband customers should use as well as changes to the information service providers must give residential customers when they want to switch. The OTS process was due to be applicable from April 2023, and after some implementation delays, it formally launched on 12 September 2024 (albeit, with a further six-week transition period). Ofcom announced in an industry letter on 11 October 2024 that it would terminate the use of the interim notification of Transfer (NoT+) service at the end of the six-week transition period (24 October 2024), following which it will investigate individual operators for breaches of the OTS process requirement.

In addition, Ofcom and the Office for Telecommunications Adjudicator (OTA2), who had been brought on board to help with this transition to the OTS, conducted a joint review on matching under the new system. In this review, though they noted that there was good performance in some areas, Ofcom and OTA2 identified further areas of improvement. In a follow- up industry letter on 2 December 2024, Ofcom shared the findings of this review and directed relevant entities to improve their compliance as a matter of urgency. Following this, Ofcom announced on 31 January 2025 that it had sent an information request to certain operators to open an investigation into the industry's failure to implement OTS by the original deadline of 3 April 2023, in a potential breach of C7.18–C7.27 of Ofcom's General Conditions.

Law stated - 1 May 2025

Customer terms and conditions

8 Are customer terms and conditions in the communications sector subject to specific rules?

As well as any service contracts in the communications sector being subject to general unfair terms legislation (eg, the Consumer Rights Act 2015), part C of the General Conditions by Ofcom imposes consumer protection conditions. Condition C1 imposes minimum information provision requirements in consumer contracts, including a maximum initial duration of two years and conditions for termination. One of the matters to be disclosed includes details of prices and tariffs, which is further extrapolated under Condition C2. Under this condition, all operators must make available clear and up-to-date information on their prices and tariffs, as well as on their standard terms and conditions of access to, and use of, publicly available telephone services.

Condition C4 and CA 2003 further require that dispute resolution mechanisms provided by the communications provider or otherwise are accessible to their domestic and small business customers (namely, businesses with 10 or fewer employees). The two dispute resolution schemes approved by Ofcom for this purpose are the Ombudsman Services and the Communication and Internet Services Adjudication Scheme.

Ofcom has set out a number of fairness rules that require providers to (among other things):

- provide clear and honest information to prospective broadband customers concerning a minimum guaranteed speed before they commit to a contract;
- compensate broadband and landline customers when they experience difficulties and delays in receiving the service;
- inform customers before their contract comes to an end and explain their best available deal (including those available to new customers); and
- allow mobile phone customers to switch provider with a text message.

Any terms that are deemed to be unfair will not be binding on consumers and Ofcom has a duty to consider any complaint that it receives from a consumer about unfair standard

terms and conditions. Under Part 8 of the EA 2002, Ofcom has enforcement powers against sellers and suppliers who breach consumer protection legislation.

In determining whether customers are treated fairly by communications service providers, Ofcom will consider the following aspects:

- how providers treat their customers throughout the customer journey;
- who is being harmed;
- the extent of the harm;
- the importance of the service; and
- whether the service depends on risky new investment.

Ofcom also publishes guidance on treating vulnerable consumers fairly. The latest version was adopted in September 2022 and, influenced by the cost-of-living crisis at the time, four key areas were revised to include additional good practice measures. These areas were:

- engagement with customers and proactively emphasising the support providers offer;
- strengthening links to the free debt advice sector;
- measures taken by providers to effect payment; and
- social tariffs, whereby in essence, communications providers should assist those who are facing financial hardship in a more proactive way.

As a recent example of its powers being implemented to protect consumers, Ofcom issued a statement on 17 January 2025 that noted that it amended the General Conditions in order to ban telecoms and pay TV providers from including inflation-linked or percentage-based mid-contract price rises in the terms of new agreements. This included amendments to C1 and the definitions under the General Conditions.

Law stated - 1 May 2025

Net neutrality

9 Are there limits on an internet service provider's freedom to control or prioritise the type or source of data that it delivers? Are there any other specific regulations or guidelines on net neutrality?

The principle of net neutrality was enshrined into law by Regulation (EU) No. 2015/2120 (the 2015 EU Roaming and Open Internet Access Regulation) (the 2015 Regulation) (implemented in the United Kingdom by the Open Internet Access (EU Regulation) Regulations 2016 – necessary for designating Ofcom as the UK national regulatory authority), which prohibits discrimination, interference or paid prioritisation affecting end-user access. It includes transparency rules requiring internet access services to publish information on any traffic management measure that could affect end users (in terms of quality, privacy and data protection), as well as information on fair use policies, actual speeds, data caps and download limits (among others). It further requires Ofcom to monitor and enforce the rules.

In October 2023, Ofcom issued guidance on net neutrality and open internet regulations. The guidance allowed internet service providers (ISPs) to offer premium quality retail packages and provided clarity on the development of 'specialised services' with the advent of 5G and full fibre networks, which could include real-time communications, virtual reality, and driverless vehicles. The guidance further clarified the use of traffic management measures by ISPs to maintain good service quality and addressed zero-rating offers, where data used by certain websites or apps does not count towards a customer's overall data allowance, stating that such offers will generally be allowed.

Ofcom published its latest Annual Monitoring Report on Net Neutrality compliance in January 2025. The report highlights significant improvements in internet access services, with gigabit-capable broadband now available to 83 per cent of residential premises and 5G coverage reaching 90 per cent of areas outside premises. It notes that Ofcom's monitoring and reporting efforts continue to support ISP compliance with net neutrality rules, which aim to ensure equal and non-discriminatory treatment of internet traffic. The report summarises Ofcom's 2023 review, which concluded that net neutrality has generally worked well, supporting consumer choice and enabling content providers to deliver services effectively. It also provides revised guidance for ISPs to innovate and manage networks more efficiently. The review found that while traffic volumes have been growing, ISPs have managed this growth without impacting service quality, and network congestion has been limited.

In 2024, Ofcom reviewed the implementation of its 2023 updated guidance by gathering information from major UK ISPs, covering data from January 2023 to September 2024. The assessment found improved internet access quality, with expanded gigabit-capable broadband coverage and increased speeds. Traffic management tools were used sparingly, indicating a need for more dynamic approaches. Retail offers complied with regulations, focusing on data allowance and speed, while specialised services were underutilised. Ofcom plans to continue annual reporting and may adjust data requirements to enhance net neutrality and network efficiency.

Ofcom's future monitoring approach will involve gathering data on network performance, traffic management policies, and the services offered by ISPs. This data will be used to assess compliance with net neutrality rules and will be included in future reports. The report also discusses the use of specialised services, zero-rating practices, and the treatment of terminal equipment by ISPs, ensuring that these practices do not infringe on end-user rights. See the Ofcom website for more information.

The 2015 Regulation now applies as retained EU law, as amended by the Open Internet Access (Amendment etc) (EU Exit) Regulations 2018 to address issues arising from the United Kingdom exiting the European Union and provide for amendments such as removing references to 'national regulatory authority', 'common rules' and requirements for Ofcom to follow requirements set by the European Commission and the Body of European Regulators for Electronic Communications (BEREC). Following Brexit, Ofcom does not need to implement the BEREC guidelines but still considers them in compliance reviews where appropriate.

Law stated - 1 May 2025

Platform regulation

10 Is there specific legislation or regulation in place, and have there been any enforcement initiatives relating to digital platforms?

Ofcom's remit covers the following platforms:

- digital terrestrial television;
- digital audio broadcasting;
- radio; and
- video-on-demand (VOD) services.

Any other digital platforms are subsequently only subject to general competition law and sector-specific regulations.

Competition

The complex nature of digital platforms and the difficulties in understanding their competitive effects has led the UK government and the CMA to take a flexible and case-by-case approach to policing digital platforms.

The CMA published a report of its online platforms study in July 2020, recommending the implementation of a new pro-competition regulatory regime. The report proposed that a Digital Markets Unit (DMU) should be empowered to enforce a code of conduct to govern online platforms with market power and make pro-competitive interventions to tackle sources of market power. The government responded in November 2020, accepting the CMA's findings and commissioning the Digital Markets Taskforce to provide advice on the code of conduct. The DMU was established within the CMA on 7 April 2021 to focus on operationalising and preparing for the new regulatory regime. The Digital Markets, Competition and Consumers Bill received Royal Assent on 24 May 2024 and is now an Act of Parliament (law), with the regime coming into force on 1 January 2025. On 11 January 2024, the CMA published an overview of how it intended to implement the new digital markets competition regime provided for under Part 1 of the Digital Markets, Competition and Consumers Act 2024 (DMCCA), including the outcomes the CMA seeks to achieve and a set of 11 principles underpinning how it will carry out its new role. On 7 January 2025, the CMA published a press release which set out its initial plans as the new digital markets competition regime came into force. The CMA plans to initiate strategic market status (SMS) investigations in three digital activity areas within the first six months. The DMCCA empowers the CMA to designate firms with SMS and impose conduct requirements to benefit UK consumers and businesses. The CMA commits to a transparent and proportionate implementation. Investigations into Apple and Google's SMS designation began in January 2025, and a third investigation is expected in the first half of the year. Each investigation will be completed within nine months, with consultations on conduct requirements running concurrently.

Spectrum management

On 11 November 2024, Ofcom published the Information Memorandum for the award of licences in the 25.1–27.5 and 40.5–43.5 GHz bands, providing details for parties considering bidding in the auction regarding the relevant spectrum, licence terms, and the award process. This was part of Ofcom's broader strategy to make 6.25 GHz of spectrum available for mobile services globally, enhancing 5G deployment in Europe. Ofcom has decided to implement new regulations, namely the Wireless Telegraphy (Limitation of Number of Licences) Order 2025 and the Wireless Telegraphy (Mobile Spectrum Trading) (Amendment) Regulations 2025, to facilitate the use of the 25.1–27.5 GHz and 40.5–43.5 GHz bands in major towns and cities. The Order proposes to grant a limited number of spectrum access high density licences for high-density areas, while the Regulations will make trading these licences subject to existing mobile spectrum trading regulations. On 5 December 2024, the CMA approved the merger between two major telecom entities. Ofcom reviewed its policy decisions for the mmWave auction and found them appropriate for a three-player market, deciding not to impose additional competition measures. Preparations for the auction are underway, with applications to be accepted in September 2025 and the principal stage beginning in October 2025. On 20 March 2025, Ofcom updated the process guidance for the auction, streamlining the timeline for withdrawals, bidder packs, and additional deposits. The Auction Regulations timeline and other procedural details were also updated. Additionally, on 14 January 2025, Ofcom opened applications for shared access licences in the 26 GHz band, with subsequent updates to the mmWave Information Memorandum on 8 April 2025 to reflect these changes.

Wider digital regulation

On 6 July 2021, the UK government published its Plan for Digital Regulation, which aims to drive agile regulation, offering clarity and confidence to consumers and businesses. Regulation will be underpinned by three principles:

- actively promoting innovation;
- achieving forward-looking and coherent outcomes; and
- exploiting opportunities and address challenges in the international arena.

The Plan set out a timeline of strategy reviews and consultations that the government intended to undertake across three, six and 12 months, including areas such as artificial intelligence, cybersecurity, media literacy, innovation and national data. The next steps were outlined in June 2022 under the Digital Strategy, a cross-government strategy that sets out the government’s agenda for digital policy. The strategy focuses on a number of key areas, including reforming and improving skills and talent provision for the digital economy. In October 2023, the UK government published an updated Outcomes Monitoring Framework against the Plan, building on stakeholder views and new research.

The UK government introduced new legislation for online safety, the OSA in September 2023. The OSA establishes a new regulatory regime to combat illegal and harmful content online, and is the first regulation in the UK to specifically target providers of online platforms and search services by requiring them to actively monitor content through their platforms to ensure user safety.

On 18 March 2024, the UK government introduced its Digital Development Strategy 2024–2030, focusing on inclusive, responsible, and sustainable digital transformation.

The strategy's four objectives were digital transformation, inclusion, responsibility, and sustainability. It aimed to reduce the digital divide, enhance infrastructure, establish AI labs, and support women's digital participation, while addressing connectivity, democracy, cybersecurity, and green initiatives, leveraging UK expertise for global development.

In 2025, the UK government implemented its 2021 plan for digital regulation, focusing on enhancing digital governance and efficiency. This included the DMCCA and the OSA, which expanded the powers of the CMA and Ofcom. The DMCCA, effective from 1 January 2025, empowers the CMA to impose conduct requirements on firms with SMS and make 'pro-competitive interventions'. The OSA provides Ofcom with broad powers to enforce online safety compliance.

The UK government aimed to transform into a more efficient digital entity by prioritising user-centric policies, upskilling civil servants, and improving security measures. Additionally, it published its response to the AI White Paper consultation, announced funding for AI research hubs, and outlined a digital development strategy for 2024–2030, including greening government initiatives and reviewing digital technology use in the public sector.

Law stated - 1 May 2025

Next-Generation-Access (NGA) networks

11 Are there specific regulatory obligations applicable to NGA networks? Is there a government financial scheme to promote basic broadband or NGA broadband penetration?

There is currently no legislation or regulation covering NGA networks in the United Kingdom. Indeed, Ofcom has stated its role is not to provide operators with incentives to make particular investments, but rather to attempt to ensure that the incentives for efficient investment are not distorted as a result of disproportionate regulation.

Pursuant to the undertakings entered into between BT and Ofcom in 2002, BT must allow its competitors access to its virtual unbundled local access points to foster competition over the supply of superfast broadband services to consumers. BT is also required to allow other providers the option of investing in NGA by giving access to its ducts and poles and other physical infrastructures.

In April 2021, the UK government announced the launch of the £5 billion Project Gigabit, in collaboration with Building Digital UK (BDUK) – now an executive agency within the Department for Science, Innovation and Technology (DSIT) – which, in its first phase, will provide more than 1 million hard-to-reach homes and businesses with next-generation gigabit broadband. In an update published in June 2023, it was reported that 76 per cent of UK premises had access to a gigabit-capable connection.

As of April 2024, the latest update on Project Gigabit showed significant progress, with 81 per cent of UK premises having access to gigabit-capable networks. The government is on track to meet the 85 per cent coverage target by 2025, with a broader goal of achieving at least 99 per cent nationwide coverage by 2030.

In December 2024, CityFibre began construction in all Project Gigabit areas, with some customer connections live by year-end. The Scottish government released a revised report on eligible premises for funding, and CityFibre added over 900,000 ready for service premises in 2024. The Gigabit Broadband Voucher Scheme supports connection costs for eligible homes and businesses. BDUK conducts National Rolling Open Market Reviews to gather infrastructure data, with the January 2025 review concluded and evaluations underway. The next review is set for May 2025, ensuring continued progress in enhancing digital connectivity across the UK.

On 26 March 2024, Ofcom launched its review of the regulations that will apply to wholesale telecoms markets from April 2026 until March 2031, which aims to create an environment to promote competition and investment in gigabit-capable broadband. Ofcom expects to publish its final decisions by early 2026.

On 20 March 2025, Ofcom announced its consultation on proposed regulations for fixed telecoms markets from 2026 to 2031, aiming to maintain pro-competition measures and support the full-fibre rollout. The proposals include expanding areas for network competition, strengthening rules on Openreach wholesale deals, introducing price caps for speeds up to 80Mbit/s, and supporting the closure of copper networks. Building on the 2021 regulations, which have led to significant industry progress, the strategy aims to achieve 96 per cent full-fibre coverage by 2027. Ofcom recognises BT's SMP and proposes a regulatory framework to address competition concerns. The consultation will run until 12 June 2025, with decisions expected by March 2026. The proposals also focus on promoting competition, especially in rural areas, protecting consumers, and ensuring a smooth transition from copper to fibre networks, with a view to potentially continuing support beyond 2031 if necessary.

Law stated - 1 May 2025

Data protection

12 | Is there a specific data protection regime applicable to the communications sector?

Regulation (EU) No. 2016/679 (General Data Protection Regulation) (GDPR) governs data protection in the United Kingdom with effect from 25 May 2018. The GDPR generally imposes stringent compliance obligations on both data controllers and data processors, alongside onerous information requirements, to ensure that the personal data of data subjects is afforded an adequate level of protection. The GDPR was implemented into UK law under the European Union (Withdrawal) Act 2018 and the Data Protection Act 2018 (DPA 2018), which received Royal Assent on 23 May 2018 and came into force on 25 May 2018.

The GDPR is complemented by the Privacy and Electronic Communications (EC Directive) Regulations 2003 (as amended) (PECR). The PECR (which implemented Directive 2002/58/EC on privacy and electronic communications) provide for measures such as:

- the safeguarding the security of a service by public ECSs;
- notice requirements, should there be any breaches of security;
- prohibitions on unsolicited or direct marketing communications;

- restrictions on the processing of user identity and location; and
- how long personal data may be held or held without modification.

The Investigatory Powers Act 2016 (IPA 2016) deals with data retention, interception and acquisition of communications data. The powers provided for in this law have been subject to various challenges since its inception. The IPA 2016 was challenged in the courts in November 2018 when a human rights group won the right to a judicial review of Part 4 of IPA 2016, which gives government agencies powers to collect electronic communications and records without reason for suspicion. Following that, the Data Retention and Acquisition Regulations 2018 increased the threshold for accessing communications data to serious crime only and imposed a requirement on authorities to consult with an independent Investigatory Powers Commissioner before requesting data. In July 2019, the High Court dismissed a human rights group's further challenge against IPA 2016 powers on the basis that the IPA 2016 includes several safeguards against the possible abuse of power and was therefore not in breach of the Human Rights Act 1998.

The Investigatory Powers (Amendment) Act 2024, which received Royal Assent in April 2024, introduced targeted amendments to IPA 2016. These changes aimed to address evolving threats from new technologies and sophisticated criminal groups. Key updates included the introduction of notification notices, which required operators to notify the Secretary of State of relevant changes to systems or services, helping to mitigate risks posed by technology that precludes lawful data access.

The Act also emphasised the importance of statutory codes of practice, providing guidance on the use of powers and ensuring safeguards to protect human rights. It introduced new regimes for handling bulk personal datasets, focusing on datasets with low or no expectation of privacy, and established criteria for assessing privacy expectations. Access to third- party bulk personal datasets was also controlled, requiring compliance with data protection laws.

Additionally, the review process for technical capability notices was clarified, ensuring operators had a clear framework for addressing concerns. These changes reflect a balance between enabling effective law enforcement and safeguarding individual rights, ensuring that the UK's investigatory powers remain robust and adaptable to future challenges.

Ofcom also has the responsibility of making sure the UK's telecoms networks are safe and secure, under TSA 2021. Ofcom has the power to monitor and enforce how providers comply with the TSA rules, including fines and enforcing interim steps to address security gaps.

Law stated - 1 May 2025

Cybersecurity

13 Is there specific legislation or regulation in place concerning cybersecurity or network security in your jurisdiction?

There is no single piece of legislation or regulation in place concerning cybersecurity or network security in the United Kingdom. It is instead covered by several pieces of

legislation, such as CA 2003 (as amended by TSA 2021), the Privacy and Electronic Communications Regulations, the GDPR and the Network and Information Systems Regulations 2018 (the NIS Regulations). The NIS Regulations impose cybersecurity and incident reporting obligations on two classes of operator in the United Kingdom:

- relevant digital service providers; and
- operators of essential services (provided they operate in certain sectors and meet threshold requirements).

On 31 May 2023, Ofcom published its updated guidance for the NIS Regulations, including changes to the incident reporting thresholds for the digital infrastructure subsector. Ofcom offers guidance on how communications providers should implement technical and organisational security measures to manage the security risks of public ECNs and ECSs. On 6 September 2024, Ofcom published an updated Network and Service Resilience Guidance for Communications Providers. The guidance aims to enhance network resilience by outlining measures such as designing networks to avoid single points of failure, implementing automatic failover functionality, and setting processes, tools, and training for resilience. It specifically prioritises voice services, especially emergency calls, over other traffic types. Providers are encouraged to inform customers about service reliability and potential risks. While there may be additional costs for providers to amend their infrastructure, the benefits are considered to outweigh these costs. The guidance is flexible, applying to all types of communications networks and services, and providers are expected to consider it in their security duties. Furthermore, Ofcom initiated a Call for Input on power backup for mobile radio access networks, seeking to address potential harms from power outages, particularly in rural areas. The feedback highlighted the need for a broader approach to power backup beyond the telecoms sector. Ofcom plans to further analyse the information to determine if additional resilience measures are needed, working with government and industry to find suitable solutions.

CA 2003 requires public ECN and ECS providers to take appropriate technical and organisational measures to manage the ECNs and ECSs, the focus of which is to minimise the impact of security breaches on end users and the interconnections of public electronic communications networks. CA 2003 also imposes several notification requirements on these providers. TSA 2021 amended the CA 2003 to introduce new, overarching security duties on public ECN and ECS providers, including by taking appropriate measures to identify and reduce the risks of security breaches occurring. The PEC Regulations similarly impose obligations on public ECSs to ensure that personal data is handled appropriately and subject to appropriate security policies.

Under the UK GDPR, data controllers and data processors must ensure that appropriate technical and security measures are put in place when handling a data subject's personal data. Where transfers are outside of the United Kingdom and are being sent to a country that does not have an adequacy decision given by the UK government, there is a need to have appropriate safeguards in place (eg, 'standard contractual clauses' approved by the UK government), and following the *Schrems II* decision (an EU decision but which is followed through UK Information Commissioner's Office (ICO) guidance) this can include requirements for 'supplementary measures' to protect the data. While supplementary measures can be contractual, there may also be requirements to have additional technical, organisational and security measures in place.

In July 2024, the UK government announced the introduction of a Cyber Security and Resilience Bill during the King's Speech, aiming to strengthen the UK's cyber defences and protect critical infrastructure and digital services. On 1 April 2025, the UK government published the Cyber Security and Resilience Policy Statement, detailing the legislative proposals for the Bill. The Bill addresses increasing threats from cyber criminals and state actors targeting essential services like hospitals and government departments and is set to be introduced to Parliament in 2025.

Key measures of the Bill include expanding the regulatory framework to cover more digital services and supply chains, enhancing the powers of regulators, and increasing incident reporting requirements to better understand cyber threats. Additionally, the government is considering further measures, such as bringing data centres into the regulatory framework and empowering the Secretary of State to direct regulated entities and regulators to take action for national security. These measures aim to ensure the regulatory framework can adapt to emerging threats and technological advancements. The Bill is part of the government's broader strategy to secure the digital economy, foster economic growth, and protect public services from cyber threats

Law stated - 1 May 2025

Big data

14 Is there specific legislation or regulation in place, and have there been any enforcement initiatives in your jurisdiction, addressing the legal challenges raised by big data?

While general data protection legislation applies to big data, no particular UK legislation or regulation covers big data specifically. However, several inquiries have been conducted by UK bodies into the benefits and challenges arising from the exponential growth in the use of big data (and its link to the internet of things). In November 2018, the UK government created the Centre for Data Ethics and Innovation, which aims to assist the UK government with identifying and addressing areas where clearer guidelines or regulation concerning data and data-related technologies are needed. In 2019, the ICO appointed a new role of data ethics adviser whose key task is to contribute to ongoing data ethics discussions.

In its Furman Report, the Digital Competition Expert Panel recognised the importance of data as a competitive tool in the UK's digital market. Specifically, it saw how digital markets tended towards concentration, with limited degrees of in-market competition, leading to significant barriers to entry because of the accumulation of data by incumbent firms. Some recommendations, therefore, sought to enable greater personal data mobility and systems with open standards. The Panel also encouraged policies of data openness in granting access to non-personal or anonymised data to new market participants. The government accepted the recommendations of the Furman Report and announced the establishment of a new DMU which has a statutory footing following the implementation of the DMCCA on 1 January 2025. The DMU will oversee the new regime for digital markets and monitor compliance with a new enforceable code of conduct to govern the behaviour of platforms funded by digital advertising that are designated as having strategic market status.

The DMCCA introduces significant reforms to UK competition and consumer protection laws, particularly in the digital sphere. As of 8 April 2025, the digital markets and competition law sections of the Act, including Parts 1 and 2, are in force, while the CMA's new direct consumer enforcement powers (Part 3) and consumer protection law updates (Part 4) came into effect on 6 April 2025.

Key elements of the Act include empowering the CMA with new enforcement powers, allowing it to decide on consumer protection law infringements and impose fines without court proceedings. The Act establishes a digital markets regulatory system and enhances consumer protections against issues like 'subscription traps' and fake reviews. It also amends existing competition laws and aims to foster a level playing field for businesses, supporting economic growth by promoting trust and confidence in the market.

The CMA has committed to a framework of proportionality, predictability, process, and pace (the '4Ps') to ensure a supportive regulatory environment. Immediate next steps include opening enforcement cases under the new regime and working with stakeholders to address consumer law advice needs The UK Plan for Digital Regulation includes plans for a review of the National Data Strategy. It intends to work on smart data, transform the use of government data and ensure the security and resilience of data infrastructure. It is planned to legislate powers for the government to mandate participation in smart data initiatives.

Law stated - 1 May 2025

Data localisation

15 Are there any laws or regulations that require data to be stored locally in the jurisdiction?

There are no data localisation requirements in the United Kingdom. There are, however, rules in the UK GDPR that require personal data transferred outside the United Kingdom to be subject to adequate protection, and where it is not subject to an adequacy decision, appropriate safeguards put in place (eg, 'standard contractual clauses' approved by the UK government), and following the *Schrems II* decision (an EU decision but which is followed through UK ICO guidance) this can include requirements for 'supplementary measures' to protect the data. Those supplementary measures can be either contractual or technical and organisational.

Law stated - 1 May 2025

Key trends and expected changes

16 Summarise the key emerging trends and hot topics in communications regulation in your jurisdiction.

AI regulation in the UK

On 26 March 2024, Ofcom published its strategic approach to AI for the year 2024/25, outlining its commitment to harnessing AI benefits while mitigating associated risks across its regulated sectors, as follows.

- Regulation of AI technologies: Ofcom focuses on the services people use rather than the underlying AI technologies. It assesses AI's impact on its sectors, ensuring that AI-driven technologies comply with regulatory outcomes, such as preventing illegal content and enhancing telecom security.

- Understanding and tackling AI risks: Ofcom has identified key AI risks, including synthetic media, personalisation, and security. It has published draft codes of practice under the online safety regime and engaged in projects to improve transparency and robustness of AI systems.

- Capability to address AI risks: With over 100 technology experts, Ofcom is enhancing its data skills and building strategic partnerships with academic institutions to share knowledge and address AI challenges effectively.

- Cooperation on AI issues: Ofcom collaborates with domestic and international organisations, including the Digital Regulation Cooperation Forum and the Global Online Safety Regulators Network, to address AI-related issues and share best practices.

- Planned AI work: Ofcom's planned AI work includes consulting on codes of practice, researching AI tools for content moderation, and engaging with broadcasters and telecoms providers to understand AI's implications on production costs and security risks

Implementation of the Online Safety Act 2024

Ofcom has released an update on the progress of implementing the OSA, which mandates online service providers to ensure user safety, particularly for children. The OSA imposes legal responsibilities on companies to assess and mitigate risks of harm to UK users, regardless of the company's location.

- Phase One: Illegal Harms. In December 2024, Ofcom published the illegal harms statement, detailing the duties related to illegal content. All relevant service providers were required to complete an illegal content risk assessment by 16 March 2025. Further consultations to enhance the initial codes are planned for spring 2025.

- Phase Two: Child Safety and Protection. Final guidance on age assurance for pornographic content was issued in January 2025, with compliance monitoring underway. Children's access assessments were required to be completed by April 2025, with risk assessments due by July 2025. Draft guidance on protecting women and girls was published in February 2025, with final guidance expected by the end of 2025.

- Phase Three: Categorisation and Additional Duties. A select group of services will be categorised as category 1, 2A, or 2B, subject to additional requirements for safety and transparency. Ofcom plans to publish a register of categorised services

by summer 2025 and issue transparency notices shortly thereafter, with further proposals on additional duties expected by early 2026

Cloud services market probe

Following a reference from Ofcom, which had carried out a market study on cloud services, the CMA independent inquiry group has published provisional findings from its investigation into the UK cloud services market, revealing that competition is not functioning optimally. The inquiry found that the biggest public cloud computing service providers dominate the market, each holding significant shares of customer spend. Significant barriers to entry and technical challenges restrict customers from switching providers, locking them into initial choices. Certain software practices further hinder competition. To address these issues, the CMA is considering using new digital markets powers to designate these major providers with SMS and implement interventions. The inquiry group is consulting on these findings and recommendations, aiming to enhance competition and unlock benefits for UK businesses and the economy.

Ofcom Communications Market Report

Ofcom's annual statistical survey of developments in the communications sector was published in July 2024. The report is now an interactive data portal containing all the major datasets for these markets. Ofcom identified certain key findings in its report, which include the following:

- decreases in the use of traditional communications services have continued;
- the demand for data across fixed and mobile connections continues to grow;
- growth in the use of data has been enabled by continued take-up of faster broadband connections; and
- overall audiovisual revenues were flat, while radio revenues grew.

Ofcom's Proposed Plan of Work 2025/26

On 28 March 2025, Ofcom released its plan of work for 2025/26, along with a strategy outlining how it intends to fulfil its mission of ensuring effective communication over the next three years.

Ofcom's Proposed Plan of Work for 2025/26 focuses on the following telecommunications and media topics:

- fast and reliable internet connections and services for everyone, everywhere;
- sustainable, affordable postal services available across the United Kingdom that meets evolving customer need;
- high-quality media and protection for audiences across the United Kingdom;
- living a safer life online, with platforms incentivised to reduce harms and keep consumers safe; and
- enabling wireless services in the wider economy.

The UK government has confirmed that it intends to designate a new SSP (Statements of Strategic Priorities) for telecommunications, the management of radio spectrum and postal services, and an SSP for online safety matters.

The UK government has published its draft SSP for Online Safety, which covers:

- safety by design;
- transparency and accountability;
- agile regulation;
- inclusivity and resilience; and
- technology and innovation

Ofcom will include a review of what it has done in consequence of the new SSP(s) in its annual report.

This Plan follows a consultation in December 2024 to gain feedback on the proposed plan.

Ofcom's three-year plan for 2025–2028, sets out its longer-term ambitions and priorities:

- internet and post: ensure reliable, high-quality networks and fair consumer treatment, and maintain affordable postal services;
- media: provide diverse, trusted content, and ensure fair competition and audience protection;
- online safety: enhance platform transparency and governance, and design services with user safety in mind;
- wireless economy: manage spectrum access efficiently, and support innovation and international engagement; and
- cross-cutting: support digital market regulation, promote media literacy, and facilitate digital transitions.

Law stated - 1 May 2025

MEDIA

Regulatory and institutional structure

17 | Summarise the regulatory framework for the media sector in your jurisdiction.

Broadcasting is regulated by the legislation set out in the above question with additional regulation from the Broadcasting Act 1990 (as amended by the Broadcasting Act 1996 and the Communications Act 2003 (CA 2003)).

Law stated - 1 May 2025

Ownership restrictions

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18 Do any foreign ownership restrictions apply to media services? Is the ownership or control of broadcasters otherwise restricted? Are there any regulations in relation to the cross-ownership of media companies, including radio, television and newspapers?

Restrictions as to who can hold a broadcasting licence and control a broadcaster are set out in both the 1990 and 1996 Broadcasting Acts; these were revised by CA 2003, which relaxed these provisions. If at any point there is a change in control over the licence or the owner of the licence, they must notify Ofcom, which will ensure that no person disqualified from holding the licence has taken control. Ofcom will also undertake a review to ensure that change of control will not negatively affect the programme content. If Ofcom does believe certain aspects of the programming may change, it could vary the licence.

Those who will be disqualified from holding a broadcasting licence will generally fall under two categories:

- religious or political groups; and
- advertising agencies.

Although religious bodies are generally restricted from holding a broadcasting licence, there are exceptions to this rule. They may own licences for:

- local analogue radio and satellite;
- cable broadcasting;
- local digital sound programme;
- national digital sound programme;
- television restricted service;
- digital programme service; and
- digital additional service licences.

Ofcom also has a duty to ensure that any licence holder is a 'fit and proper person', although there is no further guidance on this in the legislation. In the licence change of control form, Ofcom asks whether any of the new directors, shareholders, members or other relevant individuals have criminal convictions or if they have been declared bankrupt. However, the form notes that this will 'not necessarily prevent' someone from holding a licence. In addition to the above, it is worth noting that the National Security and Investment Act 2021 (NSIA 2021) gives the UK government powers to review investments and intervene in transactions that may give rise to a national security risk. NSIA 2021 introduces a mandatory notification regime that will apply to certain transactions involving entities that carry on activities in one of 17 'sensitive sectors'. 'Communications' has been listed as one of these sensitive sectors, meaning that acquisitions in this sector may require mandatory notification to the UK government for review. Following a review of the filed notification, the Secretary of State may:

- approve;
- approve with conditions; or
- outright prohibit or unwind the transaction.

Completing an acquisition that requires mandatory notification without approval (and without 'reasonable excuse') is a criminal offence under the new regime.

On 21 May 2024, the UK government published further guidance on how it would interpret the power to give a 'call-in' notice under section 3 of NSIA 2021 (ie, the circumstances under which it will be able to investigate certain dealings in intellectual property where there is a perceived risk of harm to national security). It is anticipated that this will be reviewed (at least) every five years. In this latest guidance, there were not widespread changes made to the understanding of how this power would be applied. Rather, the UK government attempted to consolidate the existing legislation into a more digestible format, and particularly noted that there are three primary risk factors that it will consider when analysing each case on an individual basis: target risk; acquirer risk; and control risk.

Law stated - 1 May 2025

Licensing requirements

19 What are the licensing requirements for broadcasting, including the fees payable and the timescale for the necessary authorisations?

BBC

The main document that regulates the BBC is the founding charter. The current charter came into force on 1 January 2017 and will end on 31 December 2027. Under the current charter a unitary board was formed to replace the BBC Trust and BBC Executive. The board ensures that the BBC's strategy, activity and output are in the public interest. Also, from 2017, the BBC fell under the remit of Ofcom and the BBC must comply with an operating licence that is set by Ofcom. The most recent licence came into effect in March 2024, and was last amended in August 2024 (where Ofcom approved a reduction in the minimum hours of news required at peak times in Scotland).

Channel 4

The most recent licence for Channel 4 came into effect in January 2025, following a 2023 consultation and 2024 decision by Ofcom. Channel 4 previously operated on a digital replacement licence that replaced its original analogue broadcasting licence in 2004. The 2017 variation to the previous licence provided for the clearance of the 700MHz band for mobile data use by 1 May 2020 (note that the 700MHz DTT Clearance Programme was completed on 20 August 2020).

On 6 December 2023, Ofcom published a consultation on the renewal of Channel 4's licence, which was due to expire on 31 December 2024. The proposals aimed to allow C4C to transition to being a 'digital-first' broadcaster, whilst ensuring continued investment in its UK content and protection of the delivery of the core elements of its output on Channel 4. Following the consultation period through early 2024, Ofcom published its decision regarding a new 10-year broadcast licence for Channel 4 on 15 October 2024. Amongst other changes, this included an acknowledgement of Channel 4's aspiration to transition to being a 'genuinely digital-first public service streamer' by 2030, and an increase in the

quotas for productions being outside England to ensure that Channel 4 is supporting the creative economy beyond London and England.

Channels 3 and 5

The most recent licences for both Channels 3 and 5 came into effect in January 2025 and will remain in place until 31 December 2034, following the conclusion of a multi-stage relicensing process by Ofcom. These licences replace Channels 3 and 5's digital replacement licences, which came into effect in 2004 to replace the original analogue Channel 3 and 5 licences. The current licence maintains the regional programming commitments in Channel 3 licences for English regions; and the creation of a more localised Channel 3 news service, which also lowered obligations. These arrangements were originally implemented following Ofcom's approval of ITV's proposals to deliver more tailored regional news, alongside a reduction in other regional programming obligations. Earlier variations made in 2017 addressed technical matters, including the provision for the clearance of the 700MHz band for mobile data use by 1 May 2020 (note that 700MHz DTT Clearance Programme was completed on 20 August 2020). Ofcom published a report in 2022 in anticipation of this new licensing round for the Channel 3 and Channel 5 services.

On 1 March 2024, Ofcom confirmed that it had decided to renew the licences for Channels 3 and 5 for a further 10 years. The formal licences were published on 1 September 2024, and included a review of the financial terms under which the licences were being granted.

Digital television programme services

Other than those provided by Channels 3, 4 or 5, digital television programme services (DTPS) licences cover the provision of television programme services. The broadcasts covered will be in digital form for general reception on a digital television terrestrial multiplex. They will also cover ancillary services such as subtitling.

Digital television additional services licences cover television services text and data services including teletext and electronic programme guides. These are not covered by DTPS licences as they are not considered an ancillary service or digital television programme services. They are broadcast in a digital form on a digital television multiplex.

Television licensable content services

A television licensable content services (TLCS) licence covers services broadcast from a satellite, distributed using an electronic communications network (ECN) or electronic communication service made available by a radio multiplex. Its principal purpose must be the provision of television programmes or electronic programme guides or both. The service must also be available for reception by members of the public.

Services such as Channels 3, 4 and 5, covered by the other licences outlined in this section, do not require a TLCS licence. Internet services, pure video-on-demand (VOD) services and two-way services, such as videophone, do not require a TLCS licence.

The most recent version of the Ofcom guidance on applying for a TLCS licence was published on 31 January 2025.

A new local television licence regime was created as part of the Local Digital Television Programme Services (L-DTPS) Order 2012. An L-DTPS will have sufficient capacity at its location for one standard-definition digital service on the local multiplex. These are operated on Multiplex L with 29 L-DTPS licences awarded.

Under the Broadcasting Act 1990, Ofcom must not grant a licence to any person unless it is satisfied that the person is a 'fit and proper' person to hold it and is not disqualified by statute from holding the licence. The proposed service cannot be contrary to the standards objectives laid out in CA 2003.

The complete Ofcom tariff table, as regularly updated, is available online. The tariffs for 2025–2026 were published on 28 March 2025.

Radio

Under CA 2003, Ofcom has the authority to regulate the following concerning independent radio services:

- analogue sound broadcasting services at a national or local level;
- radio licensable content services (services provided in digital or analogue form, broadcast from a satellite or via an ECN, for use by the public and consisting of sound programmes);
- additional radio services (a service consisting of the sending of signals for transmission by wireless telegraphy using space capacity within signals carrying any sound broadcasting service);
- digital radio multiplex services;
- digital sound and digital additional sound services at both a national and local level (text and data services not intended to be related to programming); and
- radio restricted services (licences intended to cover small-scale community uses).

Fees, duration and permissible content vary depending on the type of licence to be granted. Ofcom suggests that the easiest way to set up a radio service is to start an online radio station. Ofcom currently does not regulate online-only radio services that, therefore, do not require a licence from Ofcom.

Law stated - 1 May 2025

Foreign programmes and local content requirements

20 Are there any regulations concerning the broadcasting of foreign-produced programmes? Do the rules require a minimum amount of local content? What types of media fall outside this regime?

CA 2003 contains a limited number of provisions covering the broadcasting of foreign programmes. Regulations set out in Directive 2010/13/EU (Audiovisual Media Services) (as amended by Directive (EU) 2018/1808 and incorporated into the Broadcasting Code), require that where practicable, European production (referred to as European Works)

should account for over 50 per cent of the transmission hours of each broadcaster established in that market (subject to certain exclusions).

The amending Directive (EU) 2018/1808 provided, among other things, for an increased European Works content quota for on-demand services, raised from 20 per cent to 30 per cent. The United Kingdom was required to fully implement the amending Audiovisual Media Services Directive despite its exit from the European Union, as the date for implementation (19 September 2020) fell before the end of the Brexit transition period. Despite the UK's exit from the European Union, works produced in the United Kingdom are still considered to fulfil the definition of European Works, as European Works are defined by reference to production by ECTT countries, rather than EU member states. As a result, there may not be a significant downturn in demand for UK-produced works, as they will continue to help fulfil European Works quotas post-Brexit.

Also, the Secretary of State maintains powers under CA 2003 to disallow foreign television and radio should it fall foul of provisions in CA 2003 (eg, those that offend against taste or decency). There are no equivalent foreign restrictions for online and mobile content.

Ofcom also has the power to require local programming to be included in the output of broadcasters where appropriate. An example of this is in Ofcom's inclusion in every Channel 3 licence of a condition requiring a regional channel with programmes targeted at persons living in the area. The BBC's licence (which is also set by Ofcom) also contains quotas to broadcast local and regional programmes.

In March 2023, the UK government published the Media Bill which aimed to give domestic public service broadcasters a more flexible remit for the programmes they produce and show by replacing the 'purposes' and 'objectives' from CA 2003. On 26 February 2024, Ofcom published its roadmap for putting the Media Bill into practice and indicated that it intends to implement the new rules as quickly as possible and estimates that the full implementation programme (including designating relevant services, developing new codes and guidance and necessary changes for licences) will take place in phases over the first two years.

The Media Act 2024, the primary legislation enabling the powers to make the changes envisaged by the Media Bill, received Royal Assent on 24 May 2024. The first related regulations were published under the Media Act 2024 (Commencement No. 1) Regulations 2024 on 15 August 2024, and it is anticipated that the various changes outlined in the Media Bill will continue to be enacted through phased implementation over the course of 2025 and 2026. Ofcom publish regular updates, including an interactive timeline of consultations and proposed implementations of various sections, on their website.

Law stated - 1 May 2025

Advertising

21 How is broadcast media advertising regulated? Is online advertising subject to the same regulation?

Ofcom's role under CA 2003 is to regulate advertising on broadcast media to ensure advertising rules and standards are met. These rules and standards can be found across

several instruments. Primarily, broadcast media must follow the UK Code of Broadcast Advertising (the BCAP Code), which covers misleading advertising, protection of children, harmful and offensive content, a ban on political advertising, and rules on environmental claims, to name but a few. Additional rules are contained in Ofcom's Broadcast Codes, which cover issues such as taste, decency and product placement. Enforcement of the aforementioned rules, while ultimately Ofcom's responsibility, has been largely contracted out to the Advertising Standards Authority and its associated bodies.

One of the key amendments to the Audiovisual Media Services Directive, which were approved by the European Parliament in October 2018, was to introduce new rules concerning the proportion of daily broadcasting time that would be taken up by advertisements. Under the new rules, advertising can take up a maximum of 20 per cent of the daily broadcasting period between 6.00am and 6.00pm, but broadcasters can adjust their advertising slots within this time period so long as they do not exceed the total 20 per cent limit. The new rules also introduce a prime-time window between 6.00pm and midnight, during which advertising will also only be allowed to take up a maximum of 20 per cent of broadcasting time.

Product placement, while allowed in films, series made for television, sports programmes and light entertainment programmes (both foreign and national), is prohibited in news, children's, current affairs, religious and consumer affairs programmes. There are also rules requiring special logos to be shown at the beginning and end of the programme, as well as at the end of each advertising break to signify the use of product placement.

There are strict rules on advertising and product placement in children's television programmes and content available on VOD platforms introduced under the amendment to the Audiovisual Media Services Directive approved in November 2018.

Ofcom released a statement in December 2020, setting out the amendments to the Broadcasting Code and the Code on the scheduling of television advertising (COSTA). These amendments included changes to the rules in the Broadcast Code to reflect revised definitions, and product placement restrictions resulting from the Audiovisual Media Services Regulations.

Online advertising is subject to the Code of Non-broadcast Advertising and Direct and Promotional Marketing (CAP Code), which imposes similar standards and rules. The CAP Code also contains the rules that apply to VOD services. While there are some differences between the codes, the Code of Broadcast Advertising (BCAP Code) states that BCAP works closely with CAP to provide, as is practicable and desirable, a consistent and coordinated approach to standards-setting across non-broadcast and broadcast media.

Following the UK government's consultation on possible options for reform to the regulatory framework for paid-for online advertising in March 2022, the UK government published its formal response to the consultation in July 2023. In that response, the government committed to addressing harmful advertising practices, particularly those affecting children.

As part of this, the Department for Culture, Media and Sport (DCMS) established the Online Advertising Taskforce (OAT). The taskforce was created to deliver a programme of work to help address 'in-scope harms' (eg, illegal advertising or children being served advertising for products and (or) services that it would be illegal for them to purchase).

In November 2023, the UK government published an Action Plan outlining the OAT's key priorities and approach. In this, it was announced that the OAT's remit was being extended for at least another year, with new industry-led working groups that would tackle the following areas: age assurance, gold standard, influencer marketing, information sharing, intermediary and platform principles and research.

Law stated - 1 May 2025

Must-carry obligations

22 Are there regulations specifying a basic package of programmes that must be carried by operators' broadcasting distribution networks? Is there a mechanism for financing the costs of such obligations?

Under CA 2003, public service broadcasters, including (but not limited to) the BBC, ITV, Channel 4 and Channel 5, must provide PSB channels to all the main distribution platforms. As a result, such channels have a right to be carried on all the main platforms on a free-to-air basis. Ofcom has a responsibility under CA 2003 to review and report on the extent to which the PSBs have fulfilled the purposes of PSB and make recommendations regarding how to maintain and strengthen the quality of PSB in the future, with reviews taking place every five years. The purposes of PSB in the United Kingdom are:

- to provide a variety of programmes on a wide range of subject matters;
- to provide television services that are likely to meet the needs and interests of as many different audiences as practicable (as well as those of the actual available audiences); and
- to maintain high standards in respect of programme content, development and skill, and editorial integrity.

On 17 December 2024, Ofcom announced its review of Public Service Media from 2019–2023. In this, it outlined the proposed scope of this review, along with some underlying data and key trends identified, and laid out the terms of reference of how the review is going to be conducted over the following years. In particular, it was noted that the review will focus on how the continued trend towards online consumption of media is creating increasing pressure on the financial sustainability and future of PSBs. It was announced that this review will consist of two phases, a backwards looking then a forward looking report. These terms of reference included a proposed outline, and Ofcom announced that it is hoping to have all findings published by the end of 2025.

Alongside the decline in viewership of PSB channels, the debate concerning the television licence fee has increased. However, on 29 November 2024, the Secretary of State for the DCMS said that the UK government was committed to upholding the licence fee until the end of the BBC charter period (2027), Amongst other things, the UK government also announced a 'simple payment plan' for those facing financial difficulties.

Law stated - 1 May 2025

Regulation of new media content

23 Is new media content and its delivery regulated differently from traditional broadcast media? How?

New media content is regulated under the same broadcast content rules and legislation as broadcast media, so, for example, internet protocol television services simply require the same licences as they would for the same content offline. Following the Audiovisual Media Services Directive, the United Kingdom (through Ofcom) regulates VOD content and advertising. Rules include several minimum content standards, and on-demand services are subject to the UK Code of Non-Broadcast Advertising, Sales Promotion and Digital Marketing. The amendments made to the Audiovisual Media Services Directive in November 2018 extended its scope to video-sharing platforms in addition to VOD providers.

The Media Act 2024 builds on this framework by introducing a statutory Video-on-Demand Code specifically for larger VOD services, bringing them more in line with the standards expected of traditional broadcasters. This includes regulations on harmful content, age-appropriate ratings, and accessibility features like subtitles, audio descriptions, and sign language. Ofcom is granted the authority under the Act to enforce these standards, which includes imposing fines and mandating content removal when necessary. These reforms are designed to update regulations in response to evolving viewer habits and ensure that major streaming platforms like Netflix and Disney+ adhere to consistent content and safety standards alongside traditional UK broadcasters.

In October 2023, the UK Parliament passed the Online Safety Act (OSA). This applies to providers including search engines, messaging services, websites and online forums and captures not only services based in the United Kingdom but those based elsewhere that target UK users.

The OSA introduces a host of new duties, including obligations to prevent fraudulent advertising, remove illegal and harmful content quickly and implement and enforce age limits, as well as creating new criminal offences. The provisions are wide-ranging but focus on protecting users (in particular children) from online harm.

Ofcom is also granted new responsibilities as the independent regulator for online harms. Under the OSA, Ofcom is given the power to fine companies up to £18 million, or 10 per cent of qualifying revenue, if they fail in their new duty of care.

In light of the OSA, video-sharing platforms are subject to the new communications offences, Ofcom's new information and enforcement powers, and fee notification requirements. Starting from 10th January 2024, all pre-existing video-sharing platforms established in the UK entered a transition phase. Ofcom clarified that during this period, video-sharing platforms will be regulated under both the video-sharing platforms regime and the OSA. However, most duties under the OSA will not be applicable until the transition period concludes. On 19 April 2023 the Secretary of State laid a statutory instrument that set 2 September 2024 as the start of the 'assessment start date'. This gives video-sharing platforms in the transition phase three months to complete their assessment from the date of publication of the associated guidance. It also starts the minimum six- month notice period required to repeal the video- sharing platform regime under the Audiovisual Media

Services Regulations 2020, with the final date to be determined by the UK government in due course.

Law stated - 1 May 2025

Digital switchover

24 When is the switchover from analogue to digital broadcasting required or when did it occur? How will radio frequencies freed up by the switchover be reallocated?

The UK digital television switchover commenced in 2008 and was completed in 2012. The 600MHz band was auctioned in 2013 and the remaining freed analogue television channels have yet to be allocated.

Under the Digital Economy Act 2010, the Secretary of State was given the power to nominate the digital switchover for radio broadcasting. The UK government set the following criteria to be met before the switchover could commence:

- digital listening must reach 50 per cent of all radio listening (including via television and digital audio broadcasting (DAB));
- national DAB coverage must be equal to analogue coverage; and
- local DAB must reach 90 per cent of the population.

Ofcom's Communications Market Report, published on 30 September 2020, indicated that DAB radio listening had reached 58 per cent. Despite this, the DCMS announced in October 2021 that the digital switchover had been put on pause until at least 2030.

Law stated - 1 May 2025

Digital formats

25 Does regulation restrict how broadcasters can use their spectrum?

Although licences may set out certain restrictions in terms of information requirements and governing codes or guidance, broadcasting licences are not restrictive in terms of how the spectrum may be used.

Law stated - 1 May 2025

Media plurality

26 Is there any process for assessing or regulating media plurality (or a similar concept) in your jurisdiction? May the authorities require companies to take any steps as a result of such an assessment?

In line with its statutory obligation to review the operation of the media ownership rules every three years under section 391 of CA 2003, Ofcom released a statement in November 2021 on the future of media plurality in the United Kingdom following a call for evidence in June 2021. In this statement, Ofcom identified three features of the modern UK media landscape that may present a risk to media plurality, but are not captured under the existing regulatory framework, namely:

- online intermediaries and their algorithms control the prominence given to different news sources and stories;
- the basis on which online intermediaries serve news via their algorithms is not sufficiently transparent; and
- consumers do not always critically engage with the accuracy and partiality of online news.

As such, Ofcom has recommended that Parliament updates the current media ownership rules with the objective of promoting plurality, and that the Secretary of State broadens the scope of the existing public interest test for media mergers framework.

The current four broad media ownership rules that Parliament has put in place in the United Kingdom (and that are set out in Ofcom's November 2018 report to the Secretary of State) are set out below:

- the national cross-media ownership rule: this rule prevents a newspaper operator with a 20 per cent or more market share of newspaper circulation from holding a Channel 3 licence or a stake in such a licence of more than 20 per cent, and and prevents the holder of a Channel 3 licence from holding an interest of 20 per cent or more in a large national newspaper operator;
- the Channel 3-appointed new provider rule: this rule requires regional Channel 3 licensees to appoint a single news provider among them;
- the public interest test for media mergers: this test allows the Secretary of State to intervene in a merger involving a broadcaster or newspaper enterprise, where that merger meets certain value or market share requirements. The Secretary of State may choose to issue an intervention notice triggering a review if a merger might result in harm to the public interest; and
- the disqualified persons restrictions: certain bodies or persons must first be approved by Ofcom before holding certain kinds of broadcast licence to prevent undue influence over broadcasting services.

Intervention by the Secretary of State on the grounds of public interest under the EA includes the need for accurate presentation of news and free expression of opinion in newspapers, the need for a plurality of persons who control the media and the need for UK-wide broadcasting that is both of high quality and likely to appeal to a variety of tastes and interests. Where a public interest ground applies, the Secretary of State need not assess as to whether there would be a substantial lessening of competition by the merger (as would otherwise be required).

Detailed guidelines from 2004, by the former Department for Trade and Industry, set out those situations where the Secretary of State may intervene in merger situations involving media organisations, including cross-media mergers (eg, where there is a merger between

a newspaper and a Channel 3 or 5 licence holder). The Secretary of State may intervene where the merger involves entities from outside the European Economic Area. The policy is not for the Secretary of State to intervene where the mergers are related to satellite and cable television and radio services.

In a more recent exercise of these powers, the Secretary of Statue issued a public interest intervention notice concerning the anticipated acquisition of Telegraph Media Group Limited by RB Investco Limited (RBIL) on 26 January 2024. This was in relation to the proposed sale of the Telegraph media group, including the Daily Telegraph newspaper, to RedBird Capital IMI – a joint venture between RedBird Capital and a state-funded enterprise of the UAE. As a result, and alongside concerns over foreign ownership of a UK newspaper, legislation was eventually proposed to amend the 2002 Enterprise Act to allow the UK government to prevent such foreign control over a UK newspaper. As a result, RBIL eventually pulled out of the deal.

In November 2022, Ofcom published a discussion document that considered the role played by online intermediaries in plurality and news consumption. The report suggested the need for regulatory changes to protect media plurality due to the rise of online intermediaries. It proposed tests for potential interventions, including their proportionality, enforceability, and adaptability, and considered which intermediaries and news content should be regulated. In a report published in March 2024, Ofcom set out information on new research on online news that focused on social media, which reflected the concerns identified in the 2022 document. The evidence set out in the report will assist Ofcom with its next review of public service media.

Law stated - 1 May 2025

Key trends and expected changes

27 Provide a summary of key emerging trends and hot topics in media regulation in your country.

Media Act 2024

The DCMS published the draft Media Bill on 29 March 2023, based on the 2022 white paper ‘Up next – the government’s vision for the broadcasting sector’. The draft Bill aimed to modernise the CA 2003 and promote UK PSBs and UK radio.

The draft was formally introduced in Parliament late in 2023, and it received Royal Assent on 24 May 2024, becoming the Media Act 2024.

The Act consists of seven Parts, which include provisions around radio licensing and regulation, increased quotas to ensure VOD is accessible to those with disabilities and requirements for smart-speaker platforms to give listeners access to UK radio stations.

The Act introduces provisions to extend the ‘prominence’ regime – which guarantees a prime spot for PSB channels on electronic programme guides – to VOD services. The current regime is governed by Ofcom’s code of practice under the CA 2003 and to the new rules require VOD providers to comply as part of their regulatory obligations.

The Act has updated the regulatory framework for PSBs to make it more flexible. The Act provides greater freedom on how to fulfil the public service remit laid out in the CA 2003. This has been done by updating certain quotas to include VOD as well as linear programming and streamlining purposes and objectives.

The Act introduces new rules for Channel 4 and imposes a new duty on the Channel 4 board to consider its long-term sustainability and secure its ability to meet costs, which must also be included in its annual report to be laid before Parliament. The Act also removes restrictions on Channel 4's involvement in content production – its current status as a 'publisher-broadcaster' limits the channel to content from third parties, but the Act now allows Channel 4 to produce its own content in-house.

The Act also gives Ofcom new powers to regulate VOD (eg, Netflix, Amazon Prime or Disney+), including VOD providers that are based outside of the United Kingdom. This extends Ofcom's jurisdiction and could have significant impact on providers who will be regulated by both the European Union and the United Kingdom simultaneously. Ofcom may enforce a new code to regulate VOD services to the same standards as traditional linear broadcasting, to level the playing field between the two. Ofcom also has accompanying enforcement powers, which would enable them to impose fines of up to £250,000 or 5 per cent of qualifying revenue worldwide.

In February 2024, Ofcom published its roadmap to regulation in relation to the Media Bill, which sets out its implementation plan of each part of the Act. In particular, the plan details proposed timeline for the implementation process for regulation in relation to public service television, listed events, Channel 4, VOD, radio services, and radio selection services.

The first related regulations were made on 15 August 2024, under the Media Act 2024 (Commencement No. 1) Regulations 2024. This marks the beginning of a staggered rollout, with Ofcom publishing ongoing consultation plans, updates, and implementation guidance over the next two years. These materials are available on Ofcom's website and will include codes, updates, and relevant reports.

Online Safety Act 2023

The OSA was passed on 26 October 2023, with Ofcom as the designated regulator to enforce the Act in the United Kingdom. This imposes new duties around social media, online advertising, messaging and search services. Provisions include new communications offences and obligations to prevent fraudulent advertising as well as protections for news publisher content. Since December 2024, certain rules under the OSA particularly those related to illegal content have come into effect. Additional measures to protect children, including the use of age assurance technologies such as facial recognition and email analysis, are expected to be enforced by July 2025, especially for platforms hosting pornographic or age-restricted content.

The majority of duties under the OSA continue to be implemented in phases. Ofcom is finalising its codes of practice following consultations which are subject to the Secretary of State's endorsement. The timeline for the remaining provisions coming into effect will coincide with Ofcom 's guidance and the codes of practice.

Law stated - 1 May 2025

REGULATORY AGENCIES AND COMPETITION LAW

Regulatory agencies

28 Which body or bodies regulate the communications and media sectors? Is the communications regulator separate from the broadcasting or antitrust regulator? Are there mechanisms to avoid conflicting jurisdiction? Is there a specific mechanism to ensure the consistent application of competition and sectoral regulation?

The Office of Communications (Ofcom) and the Competition and Markets Authority (CMA) have been the bodies responsible for the regulation of the media and communications sectors in the United Kingdom since 1 April 2014.

Ofcom

Aside from its regulatory functions, Ofcom also has competition law enforcement powers, which it holds concurrently with the CMA. These concurrently held powers allow the CMA and sector-specific regulators in their respective areas to enforce the competition law prohibitions contained in the Competition Act 1998 (CA 1998). In Ofcom's case, these concurrency powers are limited to activities concerned with communications matters.

Communications Act 2003 (CA 2003) sets out Ofcom's principal duty of furthering citizen and consumer interests by regulating communications, protecting consumers from harm and by promoting competition. The Secretary of State retains some powers in certain circumstances – for instance, where a merger may raise public interest questions relating to the plurality of the media or if the Secretary of State considers it necessary to remove any concurrency functions.

Ofcom's competition law powers cover the prohibitions against anti-competitive agreements and abuse of a dominant position. These powers are derived from the CA 1998.

In addition to enforcing the competition law prohibitions, Ofcom also has investigative powers over markets by conducting market studies, with the ability to make references to the CMA for an in-depth market investigation, under the Enterprise Act 2002 (EA 2002).

One of Ofcom's competition law functions under CA 2003 is to 'further the interests of consumers in relevant markets, where appropriate by promoting competition'. Both the Enterprise and Regulatory Reform Act 2013 (ERRA 2013) and the government's 2015 Strategic Steer encourage all the concurrent regulatory authorities to coordinate in the exercise of their general competition powers, rather than their purely sector-specific regulatory powers. To facilitate this, ERRA 2013 encourages information-sharing between Ofcom, the CMA and the other regulatory bodies. The UK Competition Network and UK Regulator's Network provide the fora within which this improved coordination can take place such that cases may more effectively be resolved.

CMA

The CMA is the overarching UK competition regulatory body, coordinating competition policy and encouraging consistent enforcement between itself and the sector-specific regulators. The CMA's powers include the ability to act on a case after consultation with the sectoral regulators if the CMA believes that the case would be better tackled centrally, and the ability to withdraw a competition case from a sectoral regulator and progress the case itself.

The legal basis on which the concurrency regime is to be operated is set out in the Competition Act 1998 (Concurrency) Regulations 2014. Details of the relationship between Ofcom and the CMA concerning competition law can be found in the 'Memorandum of understanding between the [CMA] and [Ofcom] – concurrent competition powers' (published on 2 February 2016). The memorandum sets out how the concurrency regulations are to be applied to the Ofcom–CMA relationship. Both will endeavour to reach an agreement as to which body will exercise its concurrent competition powers in any given case, which will include taking into consideration the relative expertise and circumstances of the bodies. On an occasion where a decision is not adequately reached within two months, the CMA 'must notify [Ofcom] that it intends to determine which [of the bodies] is to exercise' their concurrent powers. The concurrency regulations expressly prevent the possibility of 'double jeopardy' (where two regulatory bodies review the same case simultaneously) and also provide for rules regarding case transfers between concurrent regulatory bodies.

The CMA's most recent 'Annual report on concurrency' (published on 24 July 2024) assesses how the concurrency regime has operated between 1 April 2023 and 31 March 2024. The report highlights that the Digital Markets, Competition and Consumers Act 2024 has enhanced the CMA's and sector regulators' concurrent competition powers with improved enforcement tools. It also notes that the new CMA guidance on the application of the Chapter I prohibition on environmental sustainability agreements explains that the CMA can be approached for informal advice on its application. A memorandum of understanding for regulatory coordination was published by the CMA in December 2024, setting out the arrangements by which the CMA and Ofcom will give effect to the provisions in Part 1 of the Digital Markets, Competition and Consumer Act 2024 with regard to regulatory cooperation.

In December 2024, the CMA published its 10-year review of the competition concurrency arrangements in which it sets out its findings and recommendations.

There are three areas where the CMA identified scope for improvement: (1) the sector regulators' capacity for the exercise of their concurrent powers, (2) the priority sector regulators give to Competition Act enforcement, and (3) co-operation between sector regulators and the CMA on markets work. Despite submissions by a minority of stakeholders that the concurrency regime leads to under-enforcement in certain sectors, the CMA is of the opinion that the concurrency model leads to more enforcement in regulated sectors overall compared to a model where the CMA alone exercises competition powers.

CMA panel

If it is reasonably believed that certain characteristics or conduct within a communications market may be harmful to competition, either Ofcom or the CMA can bring a cross-market

reference to the attention of an impartial CMA panel – consisting of members not involved with the initial investigations. This panel may then investigate (potentially through a Phase 2 enquiry under EA 2002) and can decide whether it should take action to mitigate, prevent or remedy any adverse competition effect or negative impact on consumers – including higher prices, lower quality, reduced variety of goods or services and stifled innovation. Alternatively, it may recommend another body take remedial action or can instead indicate what type of remedial action needs to take place to rectify any issues that are uncovered.

Law stated - 1 May 2025

Appeal procedure

29 | How can decisions of the regulators be challenged and on what bases?

CA 2003 and the Digital Economy Act 2017 (DEA 2017) outline the appeal mechanisms for Ofcom and CMA decisions concerning electronic communications networks (ECNs), electronic communication services (ECSs) and associated facilities (AFs). Also, CA 2003 offers appeal mechanisms to those wishing to appeal decisions relating to television and radio broadcasting.

ECN, ECS and AF appeal regime

Certain Ofcom decisions may be appealed to the Competition Appeal Tribunal (CAT) on judicial review grounds, namely: illegality, irrationality and unfairness. Decisions taken by the Secretary of State can also be appealed, including decisions concerning networks and spectrum functions, any restrictions or conditions set by regulators on electronic communications, a direction of Ofcom regarding its powers to suspend or restrict electronic communications, or a specific direction under the Secretary of State's powers under the Wireless Telegraphy Act 2006. Under the CAT Rules (2015), where an appeal is made concerning price control matters, the CAT must refer the case to the CMA. The CMA will then deliberate and decide on an outcome under CA 2003.

Schedule 8 of CA 2003 lists certain types of (more legislative type) decisions by the CMA, Ofcom and Secretary of State that are not appealable to the CAT, but rather by way of judicial review to the Administrative Court. These include, inter alia, the instigation of any criminal or civil proceedings, decisions relating to administrative charges orders, the publication of the UK Plan for Frequency Authorisation, recovery of sums payable to Ofcom, giving effect to regulations and imposing penalties.

Before the passage of DEA 2017, the appeal process for appealing Ofcom's decisions was on the merits. It was cumbersome, permitting considerable new evidence and new parties to an appeal. DEA 2017 made substantial alterations to the way an appeal is brought under CA 2003 by attempting to streamline the process of gathering evidence, including the cross-examination of witnesses and experts, and the general treatment of that evidence. The CAT must apply the same principles as would be applied by a court on an application for judicial review. The CAT may dismiss the appeal or quash the whole or part of the decision to which the appeal relates, remitting the matter back to the decision-maker with a direction to reconsider and make a new decision.

Television and radio broadcasting appeal regime

Owing to the changes enacted by DEA 2017, the appeals process for television and radio broadcasting-related decisions is similar to the ECN, ECS and AF appeal regime. Ofcom must have first complied with its powers under the Broadcasting Act 1990 (BA 1990) and have considered, before exercising its BA 1990 powers for competition purposes, whether there is a more appropriate way of proceeding under CA 1998 concerning some or all of the matters in question. A party affected by an Ofcom decision may appeal to the CAT only that part of the decision relating to Ofcom's competition powers under BA 1990. If a party wishes to appeal any other type of Ofcom decision, this must be done following standard judicial review procedures.

Law stated - 1 May 2025

Competition law developments

30 Describe the main competition law trends and key merger and antitrust decisions in the communications and media sectors in your jurisdiction over the past year.

Mergers

Vodafone/CK Hutchison

In January 2024, the CMA launched a Phase 1 investigation into the anticipated joint venture between Vodafone UK Limited and Hutchison 3G UK, parent company of Three UK. The CMA's Phase 1 findings suggested that the potential merger of two of the four major UK mobile network operators could lead to increased costs for consumers and a decline in service quality. Both companies are key competitors in the market, with recent substantial network investments, including 5G rollouts. Concerns arose that the merger may result in less motivation among operators to attract customers, reduce prices, or enhance services. The CMA was also concerned about the potential negative effects on smaller 'virtual' network operators which may struggle to negotiate favourable terms due to a smaller pool of host network operators.

On 4 April 2024, the CMA referred the anticipated transaction to a Phase 2 investigation and on 13 September 2024 provisionally found competition concerns as part of its in-depth investigation. The CMA published a remedies working paper in November 2024, which set out the assessment of, and provisional decision on, the appropriate remedy to address the competition concerns identified in the provisional findings. This comprised an eight-year network investment programme and specific customer protections such as time limited price caps for three years.

In February 2025, the CMA gave notice of the proposal to accept final undertakings and invited comments on the same before ultimately accepting the undertakings on 28 March 2025.

CMA Merger Charter and remedies review

The CMA's willingness to clear the Vodafone/CK Hutchison joint venture by accepting novel remedies may have been the first sign of change in the regulator's approach to assess remedies. This is also against the backdrop of the CMA coming under broad political pressure to support and contribute to the overriding national priority of the UK government: economic growth, as underscored by the replacement by the government of the CMA Chair.

On 12 March 2025, the CMA announced that it is seeking comments on its approach to merger remedies, specifically in relation to three areas, including how the CMA approaches remedies, how remedies can be used to preserve pro-competitive effects of a merger, and how the process of assessing remedies can be made as quick and efficient as possible. On the same day, the CMA published its Mergers Charter, which details principles that the CMA will apply when engaging with businesses during a merger review, and what it expects from businesses in return.

Microsoft/Mistral AI

In early 2024, Microsoft Corporation entered into a partnership with Mistral AI which comprised: (1) introducing Mistral Large (a text generation model) on Microsoft's Azure platform, (2) making Mistral's flagship commercial model and model variants available on Azure, (3) a €15 million investment by Microsoft in convertible bonds issued by Mistral, and (4) the possibility of future collaboration on research and development.

In April 2024, the CMA initiated a process inviting third parties to share their perspectives on whether the collaboration between Microsoft and Mistral complies with UK merger regulations and its potential influence on UK competition. The following month, the CMA announced its decision that the partnership did not qualify for a merger investigation as it did not believe that Microsoft had acquired material influence over Mistral AI's commercial policy through the envisaged collaboration and development opportunities.

Microsoft/Inflection

In March 2024, Microsoft Corporation announced that it had hired almost all of Inflection AI's team and entered into a non-exclusive licensing deal to utilise the Inflection IP. The CMA decided to initiate a Phase 1 investigation in July 2024 due to the overlapping activities between Microsoft and Inflection, being foundation model development and consumer chatbots.

On 4 September 2024, the CMA published its final decision clearing the transaction. The CMA found that, due to lack of material competitive constraint provided by Inflection's solutions, the transaction did not give rise to a realistic prospect of a substantial lessening of competition, and so the merger was free to proceed without further conditions.

Amazon/Anthropic

In August 2024, the CMA launched a merger inquiry into Amazon.com's partnership with Anthropic PBC which resulted in Amazon acquiring certain rights with respect of

Anthropic's business. The investment, marking Amazon's second in Anthropic, included agreements for using Amazon Web Services and Amazon's custom chips for operations.

In September 2024, the CMA cleared Amazon's US$4 billion investment in Anthropic, concluding that the deal did not warrant a merger investigation due to Anthropic's limited local revenue and market share in the UK.

Alphabet/Anthropic

The CMA launched a merger inquiry into Alphabet's partnership with Anthropic in October 2024 following an invitation to comment on the transaction from interested parties. Alphabet invested US$500 million in Anthropic in 2023, and invested a further US$1 billion at the beginning of 2025. The CMA decided that Google did not acquire material influence over Anthropic as a result of the partnership and ultimately found that no further investigations were required.

Microsoft/OpenAI

On 5 March 2025, the CMA announced that the partnership between Microsoft Corporation and OpenAI did not qualify for a merger control investigation after conducting a Phase 1 probe. Microsoft and OpenAI entered into a partnership in 2019, it involved a multi-year, multi-billion-dollar investment and an agreement to collaborate across AI supercomputing and research. Microsoft is the largest investor in OpenAI but its formal governance rights in OpenAI are limited to typical financial investor protections, the day-to-day management of OpenAI is controlled by OpenAI Nonprofit. Microsoft has also been the exclusive supplier of compute infrastructure to OpenAI workloads across research, products and application programming interface services, and benefits from an exclusive licence to OpenAI's IP, including in relation to artificial general intelligence. In light of the available evidence, the CMA did not consider that Microsoft controlled OpenAI's commercial policy, and instead exerts a high level of material influence over that policy – meaning this latest transaction did not bring about a change in the level of control vis-à-vis the position since 2019.

LetterOne loses challenge to NSIA prohibition decision

The High Court of Justice handed down its judgment in the first ever challenge to a UK government decision under the National Security and Investment Act (NSIA 2021) in November 2024. The government's Investment Security Unit initially prohibited the completed acquisition by investment firm, LetterOne, of fibre broadband company, Upp, with LetterOne subsequently bringing a judicial review challenge of the decision.

The High Court ruled that LetterOne must unwind the transaction and sell its 100 per cent stake in Upp. The judgment holds that, for several reasons including LetterOne's five founders being Russian and four of them being subject to UK sanctions for their alleged support for the Russian government, there was a sufficient risk to the UK's national security. This is particularly in the context of Upp's previously stated plans to expand its fibre broadband network across rural UK communities, where national security could be even further undermined. While the judge gave LetterOne limited permission to appeal, the deadline for doing so has since passed.

Markets

Ofcom bans inflation-linked mid-contract price rises

In December 2023, Ofcom proposed a ban on mid-contract price rises linked to inflation, suggesting that any price written into a customer's contract be set out in 'pounds and pence', prominently and transparently, at the point of sale. This rule would prohibit providers from including inflation-linked, or percentage-based, price rise terms in all new contracts. Ofcom consulted on this proposed new requirement and published its final decision in July 2024.

Ofcom's data analysis revealed that as of April 2023, four in 10 broadband customers and over half of mobile customers were on contracts subject to inflation-linked price rises. However, customer awareness and understanding of these terms remained low. Ofcom also received a significant increase in complaints related to price rises between January and October 2023, with many highlighting the uncertainty created by inflation-linked price rises.

BT compliance with the clear and simple information requirement

In January 2023, Ofcom launched an investigation into BT's compliance with the requirement to provide customers with clear and simple contract information before signing up for a new deal. Telecoms providers are required to provide customers with a summary of the main contract terms, including price, length of the contract, and early termination terms, since June 2022. Customers with disabilities can also request documents in an accessible format. Ofcom suspected that BT subsidiaries EE and Plusnet failed to comply with these requirements. The investigation considered whether BT breached the regulator's rules as a result of suspected breaches by each of these subsidiaries. A Confirmation Decision was issued in May 2024 and it was published the following July. Ofcom found that BT failed to provide required contract information and contract summary documents to some new and re-contracting EE and Plusnet customers since June 2022, which constituted a serious breach of the regulator's consumer protection rules. A penalty of £2.8 million was imposed on BT after the 30 per cent discount on the penalty figure of £4 million resulting from BT's admission of liability and its completion of Ofcom's settlement process.

Investigation into Meta's use of data

In August 2024, the CMA announced that it accepted proposals to vary commitments imposed on Meta in late November 2023 relating to competitor advertising data, following a request from the company in April 2024.

The variations, aimed at maintaining competitive fairness without disadvantaging advertisers on Facebook Marketplace, include allowing Meta to apply technical controls more broadly, covering data from all advertising customers rather than limiting them to competitors' data. Consequently, advertisers no longer need to opt-out proactively for their data not to be used, significantly simplifying the data collection process for what is known as

'digital display advertising' (where advertisers pay online companies such as social media platforms to display advertising on the latter's web pages or mobile apps).

Ofcom's industry-wide launch of the One Touch Switch process

12 September 2024 was the industry-wide launch date for the One Touch Switch (OTS) process. This comes after the regulator's previous target of 14 March 2024 proved unattainable and the broadband industry failed to meet the April 2023 deadline for implementing the OTS process. The OTS process is designed to allow customers to switch broadband and landline providers easily and quickly by only needing to contact their new provider to make the change. The new rules require providers to compensate customers if they are left without service for more than one working day and not to charge any notice-period charges beyond the switch date.

Inquiry into mobile browsers and cloud gaming

The CMA published its final report on mobile browsers and the cloud gaming market in March 2025, following its provisional report issued in November 2024. The report found that several mobile browser markets are not working well for consumers and businesses. Of particular concern was Apple's policies on how mobile browsers work on Apple's devices. The inquiry group has confirmed its concerns in all areas but two found in the provisional report. Specific aspects of Apple and Google's choice architecture practices are no longer a concern after Apple released a software update to enable users to switch their default browser, and Google provided evidence relating to prompts used to encourage users to set Chrome as their default browser for Android. No further action was necessary in relation to cloud gaming given that primary concerns have been addressed.

SMS investigation into Google in search and search advertising

The first probe under the new digital markets competition regime is seeking to establish whether Google has strategic market status (SMS) in search and search advertising activities and whether these services are delivering good outcomes for people and businesses in the UK. The CMA published an invitation to comment on 14 January 2025, setting out the scope of its initial SMS investigation and held a series of roundtable events for groups of stakeholders to explore the issues and hear their views. The intervention roadmap sets out the next steps in the investigation, these include but are not limited to further evidence gathering and analysis, a consultation on the proposed decision on the SMS designation, and an opportunity for Google to make oral representations on the proposed designation. The statutory deadline for the issue of the SMS decision notice has been scheduled for 13 October 2025.

CMA investigating SMS in mobile ecosystems

In January 2025, the CMA launched an SMS investigation into Apple and Google in relation to their mobile ecosystems. The regulator will assess the impact on people who use mobile devices and on businesses that develop services or content such as apps for them. The CMA will explore the extent of competition between Apple's and Google's

mobile ecosystems and plans to assess the potential barriers that are preventing other competitors from offering rival products and services on Apple's and Google's platforms. The investigation will also encompass any potential exploitative conduct, such as whether Apple or Google are requiring app developers to sign up to unfair terms and conditions to distribute their apps on Apple's and Google's app stores, or whether users are presented with architecture which makes it difficult to make active choices about the apps on their devices. The statutory deadline for both investigations is 22 October 2025.

Mobile radio network services CMA market investigation

On 25 October 2021, the CMA decided to refer the supply of the land mobile radio network services for public safety (and other ancillary services) for a market investigation. In April 2023, the CMA published the final report where it identified the relevant market as the supply of communications network services for public safety and determined that Airwave Solutions and Motorola now possess considerable market power and the competitive dynamics meant that there was an adverse effect on competition in the market for communications network services for public safety. Given the limited potential for remedies due to criticality of the Airwave Network and the Home Office's dependence on it, the CMA has decided on two main actions. First, a charge control will be imposed on the price for Airwave Network services to mitigate the detrimental effects on customers. Second, the CMA recommends that the Home Office develop and implement a plan for competitive pricing arrangements or regulatory measures for the supply of communications network services by the end of 2029.

On 31 July 2023, the CMA published a final order following its market investigation in October 2021. The CMA decided to impose a charge control on the price for Airwave Network services which limits the price to a level that would apply in a competitive market and will reduce the current price by almost £200 million per year. The charge control will be in effect until December 2029, subject to a review in 2026.

Motorola challenged the CMA's final order, alleging errors in the CMA's evaluation of competition in the relevant market and the profitability of the Airwave Network. However, following a hearing in August 2023, the CAT rejected both grounds of Motorola's appeal. In November 2024, a further challenge was heard by the CAT, all arguments were unanimously dismissed. Motorola then sought permission to appeal the CAT's decision and in January 2025 the Court of Appeal dismissed the grounds of application for permission to appeal the CAT decision, which upheld the CMA's findings.

BT compliance with the clear and simple information requirement

In January 2023, Ofcom launched an investigation into BT's compliance with the requirement to provide customers with clear and simple contract information before signing up for a new deal. Telecoms providers are now required to provide customers with a summary of the main contract terms, including price, length of the contract, and early termination terms, since June 2022. Customers with disabilities can also request documents in an accessible format. Ofcom suspects that BT subsidiaries EE and Plusnet may have failed to comply with these requirements, and the investigation will consider if BT has breached the regulator's rules as a result of suspected breaches by each of these

subsidiaries. The investigation is ongoing, and further updates will be provided as more information is gathered.

Cloud services market investigation

On 5 October 2023, Ofcom referred to the CMA the UK cloud services market for an in-depth examination following its market study in October 2022 which identified certain features and practices that hinder customer switching and the use of multiple cloud suppliers. The investigation has revealed that Amazon Web Services and Microsoft are the leading cloud infrastructure providers in the UK, with Google as their closest competitor. While competition has brought benefits such as innovative products and discounts, certain aspects of the market raised concerns.

To address Ofcom's concerns the CMA's investigation was based on the three market features that Ofcom expressed the most concern about, along with the potential impact of software licensing practices on cloud competition. The CMA's investigation scrutinised whether technical barriers and egress fees hinder customers from switching providers or using multiple cloud services, and whether these factors contribute to customer lock-in and impede competition. Additionally, it examined whether the discount structures of existing providers obstruct market entry and expansion, and whether software licensing practices discourage the use of rival cloud providers.

The CMA published its provisional report on cloud infrastructure services in January 2025 and found that there are 'as-efficient competitors' arising from certain features in the cloud services markets in the UK, and proposes remedies to address the harms to competition that have been identified such as switching costs and barriers to entry for new providers. The proposed remedies focus on appropriately designating SMS when applicable to allow the CMA to take targeted interventions to address competition concerns in the cloud services market.

Ofcom's 2026 wholesale telecoms review

In March 2024, Ofcom initiated a review of the regulations set to govern the UK's wholesale telecoms markets from April 2026 to March 2031. The review is designed to ensure that the UK's broadband infrastructure is future-ready, fostering competition and investment in gigabit-capable broadband to enhance services and consumer choice. Since the last review in 2021, Openreach and several other companies have accelerated the deployment of their next-generation networks. Ofcom anticipates releasing its primary consultation on regulatory proposals in 2025, with final decisions expected by early 2026.

Antitrust/litigation

Class action launched against Vodafone, EE, Three, and O2 over alleged abusive out-of-contract pricing

In December 2023, Justin Gutmann filed an application at the CAT to commence class action proceedings against the UK's four mobile network operators – Three, Vodafone, EE and O2/Telefónica. The class representative alleges that these operators exploited their market dominance by overcharging customers who did not terminate their handset

and airtime services contracts after their minimum terms expired. The claim, representing millions of customers, seeks approximately £3 billion in damages for the alleged abusive out-of-contract pricing. In March 2025, Three, Vodafone, EE, and O2 attempted to have the claim thrown out, arguing that the lawsuit is fundamentally flawed. The judgment has yet to be handed down.

EU, UK and US joint statement on competition in generative AI Foundation Models and AI products

A joint international statement supporting competition has been signed by the CMA, the European Commission, the US Federal Trade Commission and the US Department of Justice. The statement, published on 23 July 2024, is aimed at unlocking the opportunities for growth and innovation provided by AI technologies, whilst ensuring fair and open competition.

The three overarching principles for protecting competition in the AI ecosystem stipulated in the joint statement are fair dealing, interoperability and choice which mirror the core principles that already underpin competition rules for digital markets in the EU and UK.

CMA objects to Google's ad tech practices

The CMA published a statement on 6 September 2024 announcing that it had issued a series of objections alleging that Google has abused its dominance in online display advertising to favour its own ad tech services.

The CMA's provisional findings relate to the way in which Google 'self-preferences' its own ad exchange when a page is loading, which harms competition and, as a result, the performance of advertisers and publishers on Google's platforms and services. The CMA alleges that, during the series of auctions and transactions that take place to determine which ads are shown to the user, Google has been 'preferring' its own ad exchange, AdX, to prevent competition from other ad exchanges.

The CMA will now consider representations from Google, and the impacts on the online ad tech market, before reaching a decision.

Apple UK class actions on App Store fees and iCloud service

In October 2024, a £785 million class action in the UK targeting Apple over its App Store fees was cleared for trial, following a ruling from the CAT. The class representative, Sean Ennis, alleged that the tech giant has been abusing its dominant market position by overcharging UK-based app developers, while Apple argued that an aggregate award of damages would be unsuitable given certain proposed class members and developers actually benefit from Apple's alleged conduct.

The CAT published a notice of application to commence collective proceedings submitted by Which? against Apple relating to alleged anti-competitive conduct in its iCloud service in December 2024. The approximately £3 billion claim alleged that Apple abused competition rules by locking millions of consumers into its iCloud service at excessive prices, making it difficult for them to use alternative providers and forcing them to pay more than they would have paid under competitive conditions.

UK and EU announce new Competition Cooperation Agreement

In October 2024, the UK government and the EU formally concluded technical negotiations on the UK-EU Competition Cooperation Agreement (CCA), which brings to an end nearly 18 months of negotiation and which will supplement the overarching UK-EU Trade and Cooperation Agreement. The CCA will allow for greater dialogue and more rigorous enforcement of antitrust issues between the CMA, the European Commission and the national competition authorities of member states.

While the CCA represents the first instance of EU competition authorities collaborating directly with a non-EU member state, there are concerns that it does not go far enough on the UK side as the proposal only covers the CMA but not other regulators. The CCA will now be put before EU governments, the European Parliament and the UK Parliament for scrutiny.

Court of Appeal denies Meta's request to appeal CAT class action decision

In November 2024, the Court of Appeal handed down a judgment denying Meta leave to appeal a circa £2.3 billion data access class action brought by class representative Dr Liza Lovdahl Gormsen, following a February 2024 judgment in the CAT. The opt-out action alleges that Meta exploited UK Facebook users' personal data outside of the platform in an 'unfair bargain', on the basis that users had no choice but to submit to Meta's collection and processing of their information for the company's ad profit because of its market dominance in social networking. The current class is all UK Facebook users who accessed their Facebook account between 14 February 2016 and 6 October 2023 while in the UK.

Microsoft's cloud fees targeted in UK class action

Microsoft is facing a £1 billion class action in the UK over how it charges customers who buy cloud software services that rival its own Azure platform. The opt-out class action, which was announced in December 2024, alleges that Microsoft is abusing its dominance in computer operating systems and unfairly overcharging business customers if they purchase its Windows Server and use it with the cloud platforms of Microsoft's main rivals, including Amazon, Google and Alibaba.

BT wins first ever collective action

The CAT handed down its judgment for the first opt-out competition collective action to go to trial in the UK in December 2024. The CAT dismissed the £1.3 billion claim brought by the class representative Justin Le Patourel after finding that BT had charged its customers fair prices and had not acted abusively because the prices reflected the value attributed to BT's services by its landline only customers. The CAT focused on evidence relating to the positive BT brand value and high customer satisfaction scores to decide that pricing was adequate despite the fact that BT's prices exceed a competitive cost benchmark.

CMA publishes terms of reference for new Growth and Investment Council

In January 2025, the CMA published the terms of reference for the new Growth and Investment Council which has been established to bring senior stakeholders from business and investor groups together on a regular basis to discuss steps to support effective competition and consumer protection that drives innovation, investment and growth. Among other things, the Council will provide expert knowledge on how the regime can support businesses and investors in the UK, help to identify opportunities for growth in particular sectors in the UK economy, and offer feedback in relation to the CMA's proposed programme of activity as set out in its draft Annual Plan and in relation to its work as reflected in the CMA Annual Report.

CMA issues first fine for anticompetitive behaviour in the UK labour market

The CMA's first fine for anticompetitive behaviour in the UK labour market was issued on 21 March 2025 to sports broadcast and production companies: BT, ITV, IMG, BBC, and Sky. The five companies were found to have exchanged competitively sensitive information about freelance worker fees, including camera operators and sound technicians, which allowed for coordination on pay rates. The fines totalled £4.2 million after the application of discounts for admissions of wrongdoing by BT, IMG, ITV and BBC. Sky was exempt from the financial penalty for alerting the CMA of its involvement before the investigation was launched.

Regulatory

Digital Regulation Cooperation Forum

In July 2020, the CMA, Ofcom and the Information Commissioner's Office (ICO) established the Digital Regulation Cooperation Forum (DRCF) to deliver a step-change in coordination and cooperation between regulators in digital markets. The Financial Conduct Authority – initially an observer member – joined as a full member in April 2021. The DRCF is a non-statutory voluntary network – it does not have a decision-making role and does not provide formal advice or direction to members. Rather, the forum aims to achieve coherent, informed and responsive regulation of the UK digital economy; specifically, the organisations believe that the challenges posed by the regulation of online platforms require a greater level of regulatory cooperation.

On 27 April 2023, the DRCF published its key outputs across the period 2022–2023. It highlighted the CMA-Ofcom joint statement on 'Online safety and competition in digital markets', the publishing of the DRCF Terms of Reference, and the ICO-Ofcom joint statement on interaction between 'Online safety and data protection regimes'.

The DRCF also published its '2024/25 workplan', which set out the organisation's strategic vision for the following three years. The 2025/26 workplan published in April 2025 sets out how the three-year vision is being implemented currently. This vision is steering the long-term aims of the DRCF's annual work package and the plans it is developing and delivering for the years 2025/26 and 2026/27. The key areas of focus in the DRCF's three-year vision include protecting and empowering people online, unlocking digital

innovation and economic growth, supporting regulator effectiveness, leading domestic and international discussions, and anticipating future developments.

The Digital Markets, Competition and Consumers Act

The Digital Markets, Competition and Consumers Act 2024 (DMCCA) came into force on 1 January 2025 and became effective on 6 April 2025 after receiving Royal Assent in May 2024. The DMCCA is a piece of UK legislation that aims to promote free and fair competition among businesses, both online and offline, while also protecting consumers from unfair practices. There are three primary areas of focus for the legislation.

First is consumer protection. The Act empowers the CMA to take enforcement action against businesses that use unfair practices to deceive consumers, such as fake reviews, subscription traps, and pressure selling. It also allows the CMA to determine when consumer law has been violated, rather than having to take each case to court, which speeds up the process of protecting consumers and ensuring that fair-dealing businesses are not at a disadvantage. The Act also includes provisions that allow the CMA to fine businesses that break the law up to 10 per cent of their global turnover.

The second is digital markets. The Act established a new regime overseen by the Digital Markets Unit (DMU) within the CMA, which is designed to hold digital firms accountable for their actions and prevent firms with SMS from using their size and power to limit digital innovation or market access. The DMU uses a proportionate approach to regulate digital firms, enabling all businesses to compete fairly in digital markets.

In January 2024, the CMA published an overview of the CMA's provisional approach to implement the new Digital Markets competition regime as proposed by the DMCC. This regime is only applicable to firms identified by the CMA as having SMS in one or more digital activities, after a thorough investigation and public consultation. If a firm is found to be exploiting its SMS, the CMA will intervene with targeted actions. These actions may include imposing conduct requirements, such as preventing SMS firms from favouring their own products, requiring them to allow interoperability with other firms' products, or mandating increased transparency in their algorithms.

Finally, the DMCCA aims to promote competition in the economy more broadly. It gives the CMA stronger investigative and enforcement powers, which allows it to conduct faster and more flexible competition investigations and identify and stop unlawful anticompetitive conduct more quickly.

The DMCCA introduced amendments to the Enterprise Act 2002 to restrict foreign state ownership of UK newspapers. These amendments aim to prevent the influence or control over UK newspaper enterprises. To trigger intervention, the Secretary of State must have a reason to believe that a merger would lead to foreign state control or influence. If this is the case, then a 'foreign state intervention notice' will have to be issued to the CMA.

Updated National Security and Investment Act 2021 guidance

The UK government has continued to provide guidance on the application of NSIA 2021, which imposes mandatory and voluntary notification requirements for certain types of acquisitions that are deemed to raise national security concerns.

In November 2023, the UK government issued a call for evidence on the operation of NSIA 2021, specifically regarding views on the regime's impact on business and investors; whether the scope and requirements of the regime are proportionate and effective; and how well stakeholders understand the regime; and what risks to national security investments may pose.

On 18 April 2024, the UK government published the call for evidence outcome. Within the outcome the UK government announced that it would provide clarity on the areas of the economy that the UK government see risks and publish updated market guidance. In May 2024 a new edition of market guidance was published. It covers changes to the NSIA notification process, new guidance on UK nationals acquiring an entity or asset outside the UK, and changes to guidance for the higher education and research-intensive sectors. In December 2024, the government published its report on the performance of NSIA 2021 since it came into force, concluding that the Notifiable Acquisition Regulations 2021 are generally achieving their objective and are aligned with the government's growth mission.

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