

The EBU logo is displayed in a bold, white, sans-serif font. The letters 'E', 'B', and 'U' are connected, with the 'B' being significantly larger than the 'E' and 'U'. The background of the entire slide is a photograph of a modern building's interior at night, featuring multiple levels with glass railings and illuminated rooms. Two large, semi-transparent white circles are overlaid on the image, one on the left and one on the right, framing the central text.

**EBU**

OPERATING EUROVISION AND EURORADIO

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# LICENCE FEE

## Where? How? What's New?

MEDIA INTELLIGENCE SERVICE  
DECEMBER 2023

# ABOUT THIS REPORT

This public report presents the main findings and a selection of charts and maps from the latest edition of the EBU's Media Intelligence Service Licence Fee Report, published in December 2023. It aims to provide a unique international perspective on licence fees - including recent reforms, amounts charged and collection procedures.

The topic is crucial for Europe's public service media (PSM), as the licence fee remains the lifeblood of these organizations. Moreover, an international benchmark is particularly important at this time when many licence fee systems are under intense scrutiny or are being adapted to the changing media landscape.

## DATA SOURCES

This report mainly uses data provided by PSM organizations that are Members of the European Broadcasting Union (EBU). The information was collected in the financial section of the 2023 Media Intelligence Survey.

When necessary, additional information was obtained and/or cross-checked with official sources such as licence-fee collection agencies and regulatory authorities.

Economic and demographic data from the IMF (population, GDP, inflation), Eurostat (households) and Bloomberg (exchange rates) were also used in the report.

## COUNTRY SAMPLE

The EBU is a professional alliance of 112 member organizations spread across 56 countries. This particular report focuses on the licence fee and similar forms of contributions paid by households to fund PSM. As at 1 December 2023, 21 markets in the EBU area charged a licence fee.

When data refer to complete years, 2022 is used as the reference year. In cases where 2023 is already comparable, we provide the latest available data.

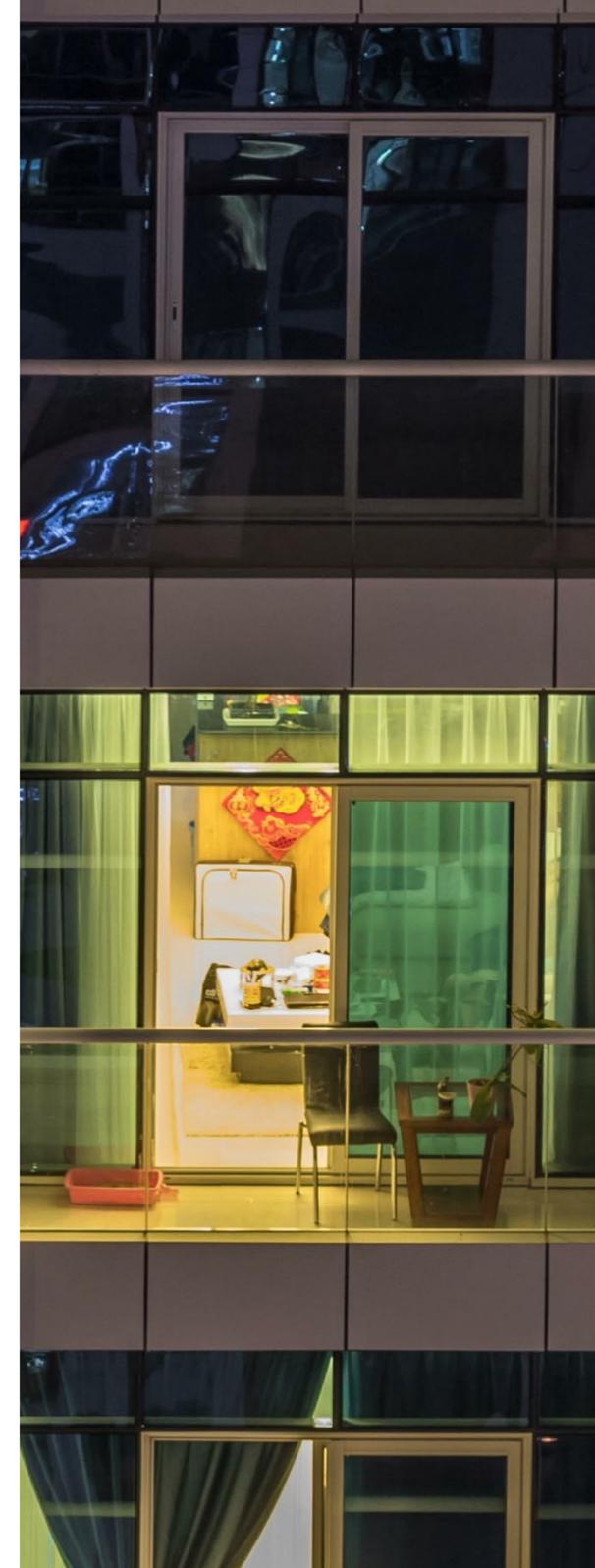


Please note that the full report - for EBU Members only - is available on the webpage of the Media Intelligence Service : [www.ebu.ch/mis](http://www.ebu.ch/mis)

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# KEY FINDINGS

## THE CORNERSTONE OF PSM FUNDING

### LICENCE FEE STILL WIDESPREAD IN THE EBU AREA



- 21 EBU countries (39%) still have a licence fee at the end of 2023.
- The fee remains by far the first source of PSM funding. It was providing EUR 18.7 billion, or 47% of the PSM funding mix across the EBU area in 2022.
- Data demonstrates that adequate fees still correlate with strongly performing PSM: the higher the fee, the better the PSM performs.

### FEE UNDER SCRUTINY



- The fee has recently been transformed or dropped in several European countries. In 2023, it was dropped in Slovakia.
- Its future is currently at stake in several additional markets. The three most frequent alternative options are: transforming the fee into a household charge (e.g. Germany and Switzerland), replacing it with a specific fund ringfenced outside the state budget, financed by a PSM special tax (e.g. Finland and Sweden), or simply replacing it with transfers from the state budget (e.g. Denmark, North Macedonia, Norway and Romania).

### IT IS AFFORDABLE FOR CITIZENS LIVING IN THE EBU AREA



- The fee costs EUR 0.29 per day per household on average (EUR 107 per year): that is far cheaper than most pay-tv and premium SVoD subscriptions tiers and bundles.
- The licence fee amounts to only 0.33% of GDP per capita on average, representing a limited outlay for European households.
- This proportion has been steadily decreasing (it was 0.55% in 2014): the fees represent an always smaller contribution from households, when considering the overall economic landscape.

### INCREASING PRESSURE TO TOP-SLICE



- There is increased pressure to top-slice the fee (i.e. when part of the licence fee is siphoned off to fund non-PSM organizations). In 2021, PSM received on average 90.5% of the fee income.
- Increased top-slicing undermines the fee's legitimacy and acceptance thereof by the public. This factor can be particularly damaging for PSM.

### A GREAT ARRAY OF LICENCE FEE MODELS



- There are many methods for organizing collection – the most widespread collection agencies are electricity suppliers (11 countries in 2023) and PSM themselves (6 countries).
- Other possibilities witnessed are tax authorities, postal agencies or private companies.

### FLEXIBLE FRAMEWORK AND SCOPE

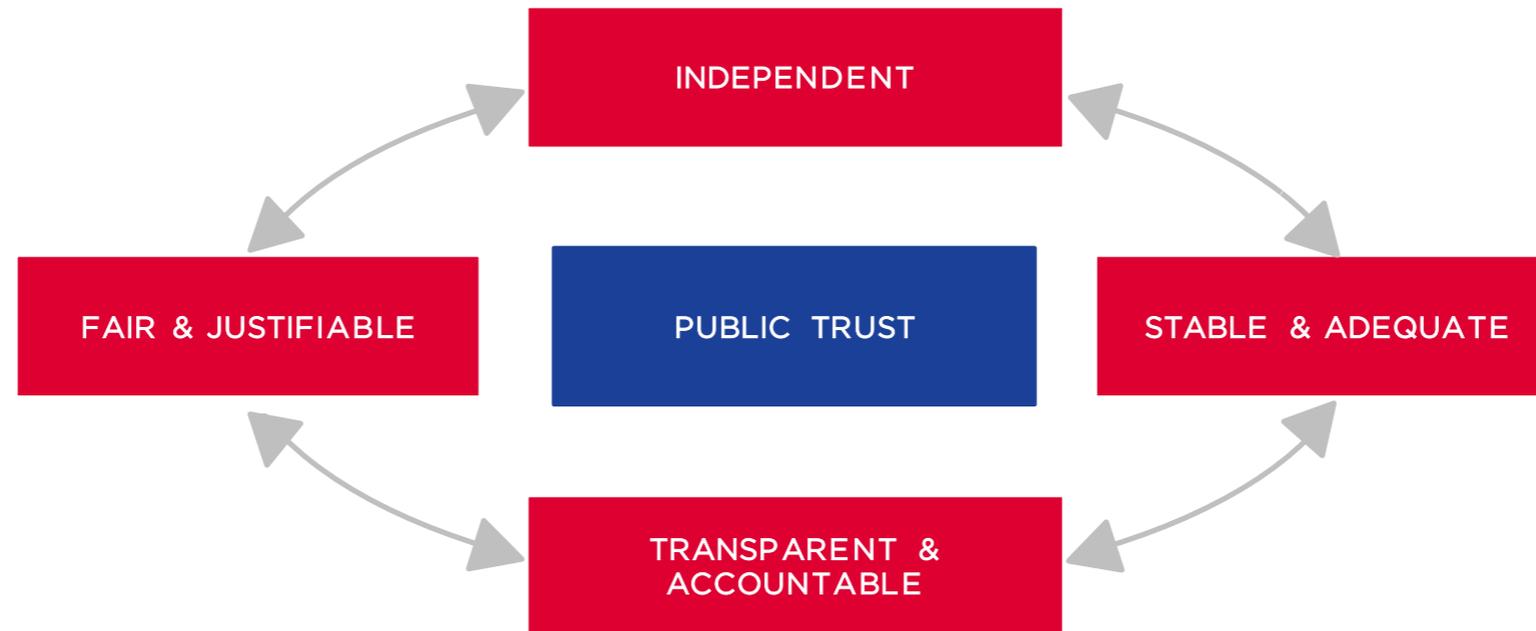


- The fee is adaptable to new realities. In 2023, 68% of countries no longer limit the fee to ownership of traditional devices but also link it to connected devices.
- Businesses are required to pay the fee in 95% of the markets in 2023.
- Second homes are subject to the fee in 41% of cases in 2023.
- Numerous exemptions are in place to correct the regressive nature of the fee.

## WHY A LICENCE FEE?

# A STABLE, INDEPENDENT, TRANSPARENT AND UNIVERSAL FUNDING SCHEME

### EBU PUBLIC FUNDING PRINCIPLES



Read more about PSM public funding principles in the publication from EBU-Legal [“Public Funding Principles for Public Service Media”](#).

WHY A LICENCE FEE?

## LICENCE FEE FAVORS ACCOUNTABILITY



**DIRECTLY FUND  
THEIR  
PUBLIC  
BROADCASTER  
VIA LICENCE FEE  
ACROSS THE EBU AREA**

HOW IMPORTANT IS LICENCE FEE FOR PSM?

## LICENCE FEE REMAINS THE MAIN SOURCE OF PSM FUNDING

PSM EARNED

EUR

18.7

BILLION

FROM LICENCE FEE  
IN THE EBU AREA  
IN 2022

Despite recent abolitions in Nordic countries, France and Türkiye, licence fees and household charges remain the most common source of PSM funding in western and southern Europe, and, overall, the main source of PSM funding with 47% of the entire PSM funding mix in 2022 in the EBU area.



Note: data based on 65 PSM in 48 EBU markets.

Sources: EBU based on Members' data

EBU Media Intelligence Service - Licence Fee 2023 (Public)

# HOW IMPORTANT IS LICENCE FEE FOR PSM?

## ADEQUATE FUNDING IS KEY TO PSM PERFORMANCE

The higher the licence fee, the larger the PSM market share in their domestic markets. This clearly speaks in favour of guaranteeing sustainable, stable levels of funding for PSM organizations.

Licence fee amounts are closely correlated with annual PSM radio and TV market shares.

The correlation should not be considered as showing an exclusive, one-to-one link between public funding and performance, as PSM may only receive a limited share of the total licence fee, and they may also receive supplementary funding.

### Interpreting the correlations

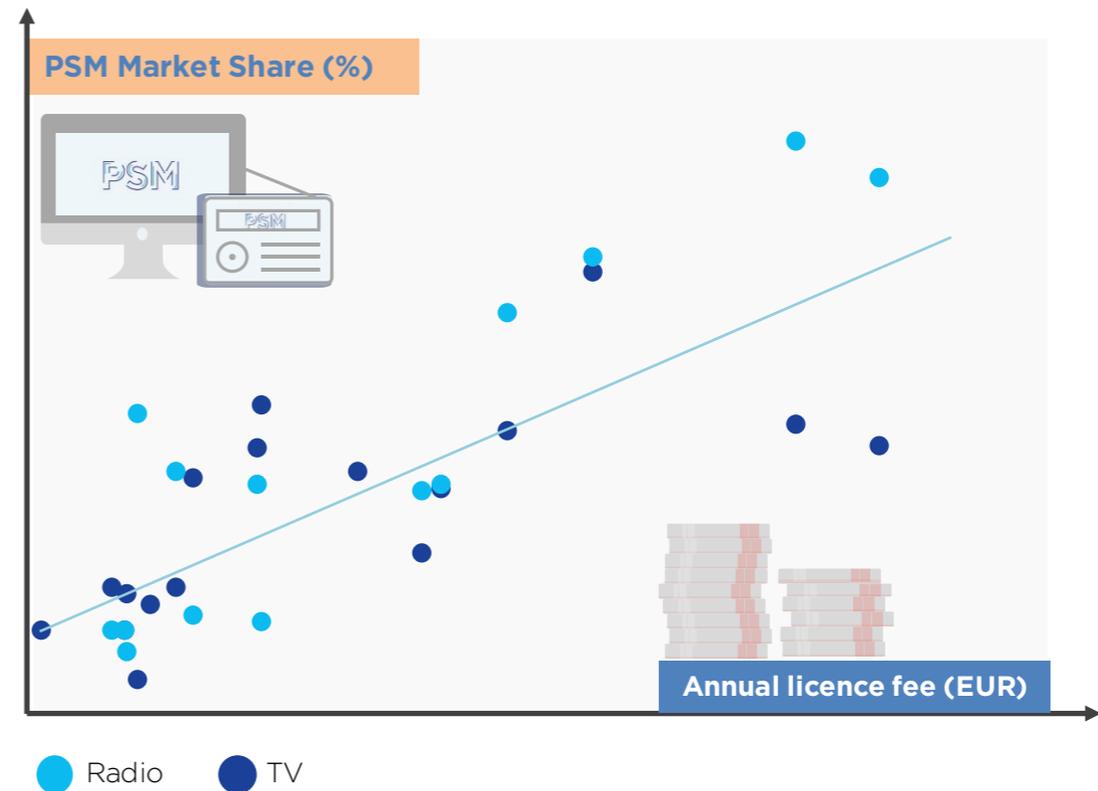
The fact that the level of the licence fee correlates with PSM performance raises several questions.

Are well-funded institutions more inclined to develop appealing, innovative programming, allowing them to perform better on their market?

Or, on the contrary, are the best-positioned organizations on the markets also better armed to negotiate with the political sphere for an appropriate licence fee?

Finally, are the more popular PSM organizations rallying massive public support, explaining the higher public acceptance of the licence fee and the opportunity to charge more?

ANNUAL LICENCE FEE VS. PSM TV AND RADIO MARKET SHARE  
(EUR, %, 2022)



Note: trend line stands for both correlations with TV and radio shares.

## WHERE IS THE LICENCE FEE COLLECTED?

# 21 EBU COUNTRIES COLLECT A LICENCE FEE IN 2023

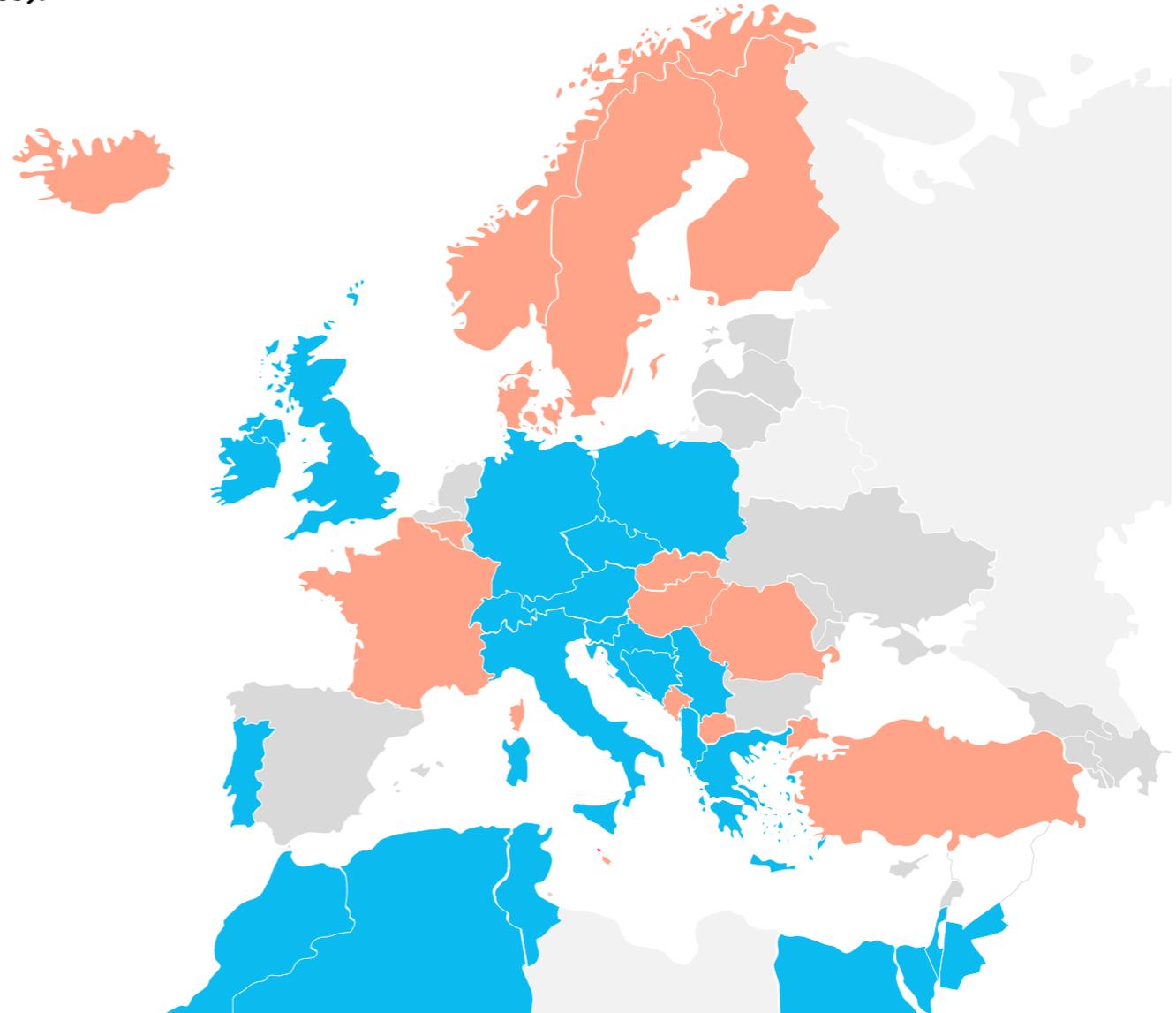
21 out of 54 EBU markets collect a licence fee at the end of 2023 (39%). This proportion stands at 37% when considering EU countries only (10 out of the 27 EU countries).

COUNTRIES WITH A LICENCE FEE  
(December 2023)

**LICENCE FEE IN PLACE**

**FEE DROPPED 2009-2023**

**NEVER ANY LICENCE FEE OR  
DROPPED BEFORE 2009**



HOW MUCH IS THE LICENCE FEE?  
**LICENCE FEE IS AFFORDABLE**

THE FEE COSTS  
ON AVERAGE  
ONLY

EUR

**0.29**

PER DAY AND  
PER HOUSEHOLD  
IN THE EBU AREA



# HOW MUCH IS THE LICENCE FEE? EUR 107 PER YEAR ON AVERAGE IN THE EBU AREA

In 2023, households in EBU countries with a licence fee paid an average of EUR 107 (and a higher EUR 124 in EU countries). This was EUR 0.29 per day per household in the EBU area (EUR 0.34 in the EU).

Despite a small increase between 2021 and 2023, the average fee across the EBU territory remains significantly lower than its 2018 level (EUR 132). This represents a decrease of 19% in just five years. This trend reflects the abolition of the fee in the Nordic countries and in France, where the fee was higher than the average.

## BENCHMARKING FEES: A DIFFICULT EXERCISE

The Annual Licence Fee chart displays annual licence fees in the 19 EBU countries which were still collecting a fixed licence fee in January 2023. Owing to the following factors, an international benchmark of licence fees must however be defined very carefully:

**VAT** - Whether VAT is charged or not creates a methodological caveat for licence fees, since the 2023 VAT rates ranged from 0% to 10% from country to country.

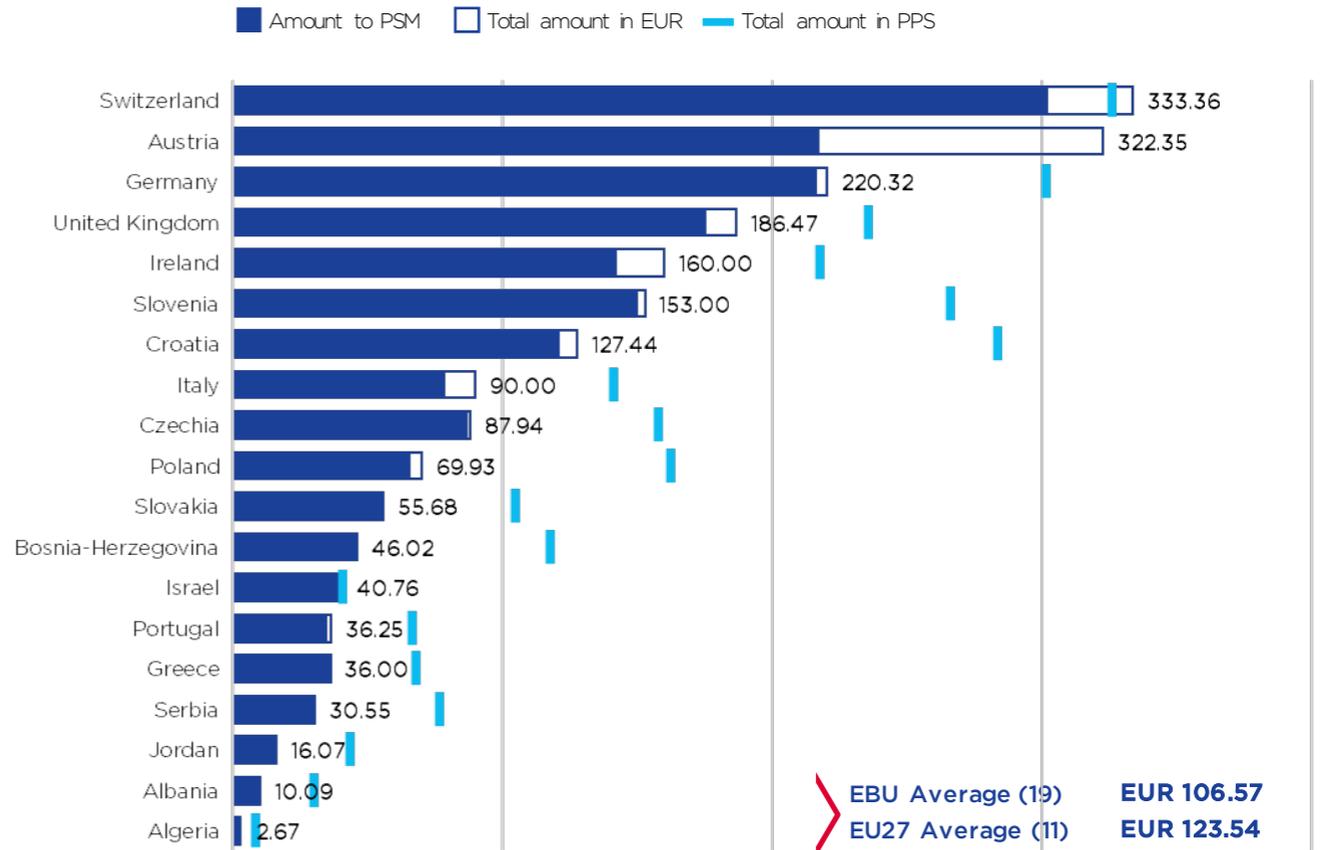
**Top-slicing: PSM do not always receive full fee** - In several countries the total amount collected is shared between various beneficiaries. The fee may therefore be set at a higher level than in comparable countries where it exclusively funds the activities of the PSM.

**PSM rely on the fee to differing extents** - In several markets, PSM do not rely heavily on licence fee income as they have other significant sources of revenue in their funding mix, typically state grants or advertising. This is for instance the case in Ireland or Italy, where the fee has long been complemented by commercial revenues.

**National specificities and scope of remit** - A striking case is that of Switzerland: under its public service remit, SRG SSR provides broadcasting services in the four national languages. Such a pluralistic policy results in significant additional costs compared to other markets of a similar size.

**Exchange-rate volatility** - The benchmarking exercise also involves converting the fees from national currencies to euros. Exchange-rate volatility may have strong implications for data comparability and may affect the results in euros, such as in the case of Switzerland and the UK with the major fluctuations in the CHF/EUR and the GBP/EUR exchange rates in the last few years.

## ANNUAL LICENCE FEE (EUR, PPS, 1 January 2023)



Notes: 1 January 2023 amount, with 2022 exchange rates and % top slicing.

Slovakia included as the fee was dropped in July 2023.

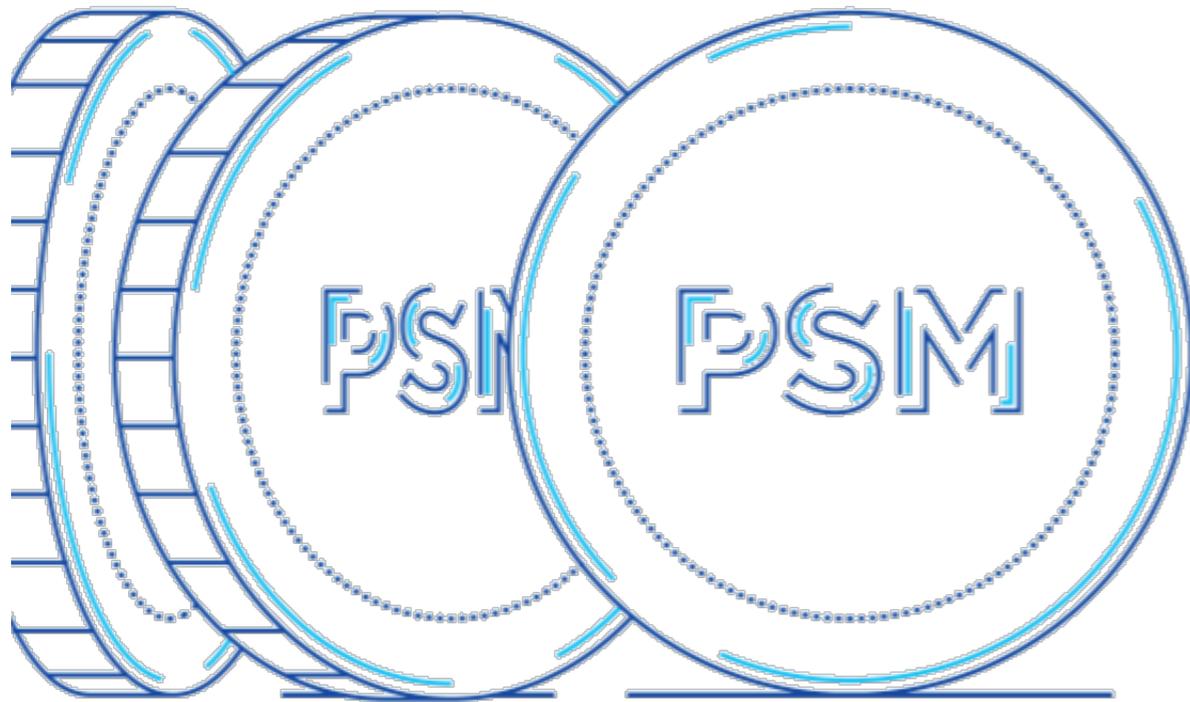
Does not include countries where fee is a proportional amount - Egypt, Morocco and Tunisia.

Note: amounts to PSM include collection costs when it is organized by PSM themselves.

2018 top slicing for Albania.

WHO BENEFITS?

## LICENCE FEE SHOULD MAINLY FUND PSM



PSM RECEIVED  
ON AVERAGE

**91%**

OF THE FEE INCOME  
IN THE EBU AREA

# WHO BENEFITS?

## A LONG LIST OF BENEFICIARIES FROM TOP-SLICING

**When the licence fee is not allocated in full to PSM, it is normally used for related audiovisual activities. In several cases, however, the fee is also transferred to non-media institutions, putting the public's acceptance of the fee at risk.**

Redistribution, or top-slicing, of the licence fee is one of the recurrent issues brought to the public debate by those challenging PSM access to the revenues generated.

Who are the various stakeholders also benefiting from the fee in the EBU area?

### Regulatory authority

One of the most common uses of the portion of the licence fee not allocated to PSM is to pay for the broadcasting regulatory authority.

In 2022, in at least four countries (Croatia, Germany, Ireland and Switzerland), the regulators were funded from the licence fee, from minimal amounts (0.3% in Switzerland) to the 6.7% for the Irish authority.

In the case of Ireland, this transfer has a specific purpose, the Sound and Vision scheme, which funds independent television and radio programmes on a series of topics that are later distributed by eligible broadcasters (not only PSM) under certain conditions specified by law. In this sense, part of the money used under this scheme indirectly helps to fund programming at the two Irish PSM.

### Other broadcasters

The licence fee also funds other broadcasters.

In Switzerland, the licence fee is used to subsidize local and regional television and radio stations (6.0% of the total amount in 2022), most of which are privately owned. The share of the fee allotted to local and regional broadcasters has increased in Switzerland since 2019, when the country replaced the traditional fee by the modernized household charge. The fee also pays for the Swiss audience measurement system with 0.2% of the amount collected.

Local channels in the UK also benefited in the past from a small amount of income derived from the fee (0.1% of the total amount in 2017). This was to support the launch of local TV channels in the UK. However, this scheme did not prove very successful and was phased out.

### Cinema activities

Another purpose of top-slicing is to pay for cinema and other audiovisual activities in general. In 2022, this was seen in Slovenia (2.0% to the Slovenian Film Centre) and Croatia (1.8% to the Croatian Audiovisual Centre).

### Government departments

Government departments were also allotted variably significant proportions of the fee in 2022. The amounts transferred to the state were quite substantial in several markets, for instance in Italy with 13% (incl. 4% VAT) for the ministry of economic affairs and finance or a breathtaking 29.9% in Austria (shared between the federal states, the ministry of finance and the ministry of art and culture, and not including a 6.9% share for VAT).

### Top-slicing and public acceptance

Top-slicing of the fee may prove to be highly problematic for PSM, undermining their financial resources and ability to remain relevant and to innovate.

On the other hand, the sharing of the licence fee income between various media stakeholders might help in creating alliances and building the case for preserving the fee and this particular funding model.

However, top-slicing sometimes also benefits activities which are far removed from those originally intended for the licence fee. Such a phenomenon clearly undermines the legitimacy of the fee and its public acceptance, and this kind of top-slicing should be avoided.

# WHO COLLECTS? WIDE RANGE OF COLLECTION METHODS

There are almost as many collection methods as countries charging a licence fee in the EBU area. Five main types of collection agents were active in 2023: the PSM itself, electricity suppliers, postal operators, tax authority and specific private companies.

**Electricity suppliers:** they are the most widespread type of collection agency, collecting the licence fee in exactly half of the EBU countries with a fee in 2023 (11 of 21): Albania, Algeria, Bosnia-Herzegovina (under a July 2017 agreement switching from telecom operators to electricity companies), Egypt, Greece, Italy (since 2016), Jordan, Morocco, Portugal, Serbia and Tunisia. As illustrated by the map, all the countries with a fee collected by electricity providers are southern European and northern African countries.

**PSM:** in six EBU countries, collection is directly or indirectly enforced by the PSM itself:

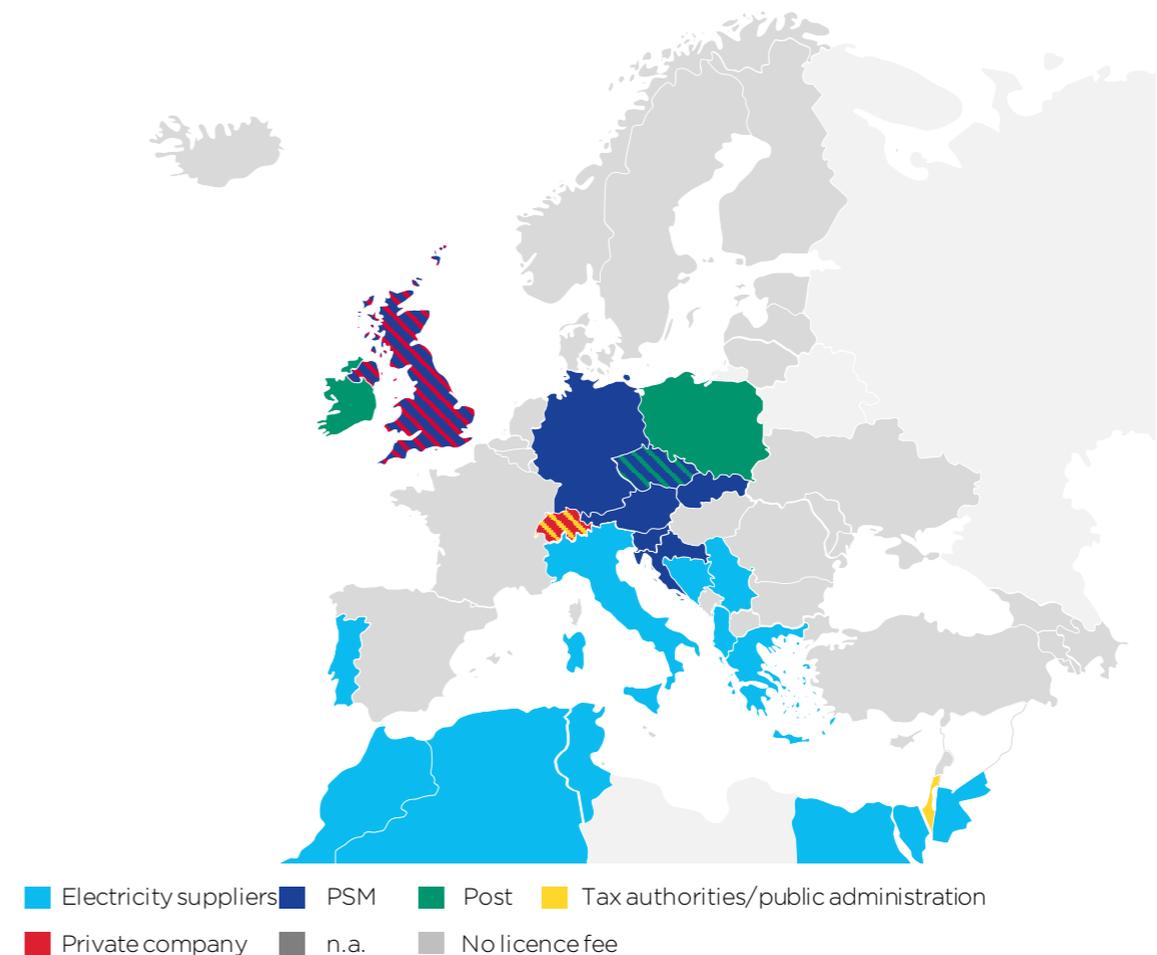
- In three cases (Croatia, Slovakia and Slovenia), the collection is directly organized by the PSM.
- In two other cases, PSM have set up a licence fee collection subsidiary. This happens in Austria with the GIS Gebühren Info Service GmbH and in Germany with ARD ZDF Deutschlandradio Beitragsservice.
- Finally, the work involved in collecting the fee might be so burdensome that the PSM decides to outsource it, while maintaining ultimate responsibility. In the UK, the BBC Licence Fee Unit has delegated licence fee collection to private companies. The latest BBC TV licensing contract was signed in 2022 with Capita Business Services, for the period July 2022 to June 2027. The contract was worth GBP 456 million (approx. EUR 520 million).

**Post offices:** they are responsible or co-responsible for the collection in three countries: Czechia (partially in conjunction with the PSM), Ireland and Poland.

**Tax authorities/public administration:** in Israel, the “additional sum for IPBC” is coupled with the motor vehicle fee, collected yearly by the ministry of transport.

**Private companies:** in Switzerland, the fee for private households is collected by a private company. The current company is Serafe AG, a subsidiary of the Secon AG group. It was chosen thanks to a public tender covering the period 2019-2025. The fee for businesses is not collected by Serafe AG but by the Swiss Administration (Federal Tax Administration).

TYPE OF COLLECTION BODY  
(2023)



Note: in Czechia, collection is organized jointly by the PSM and the post office. In the UK, collection is organized jointly by the PSM and private companies.

Note: Slovakia included as the fee was dropped in July 2023 .

Sources: EBU based on Members' data

EBU Media Intelligence Service – Licence Fee 2023 (Public)

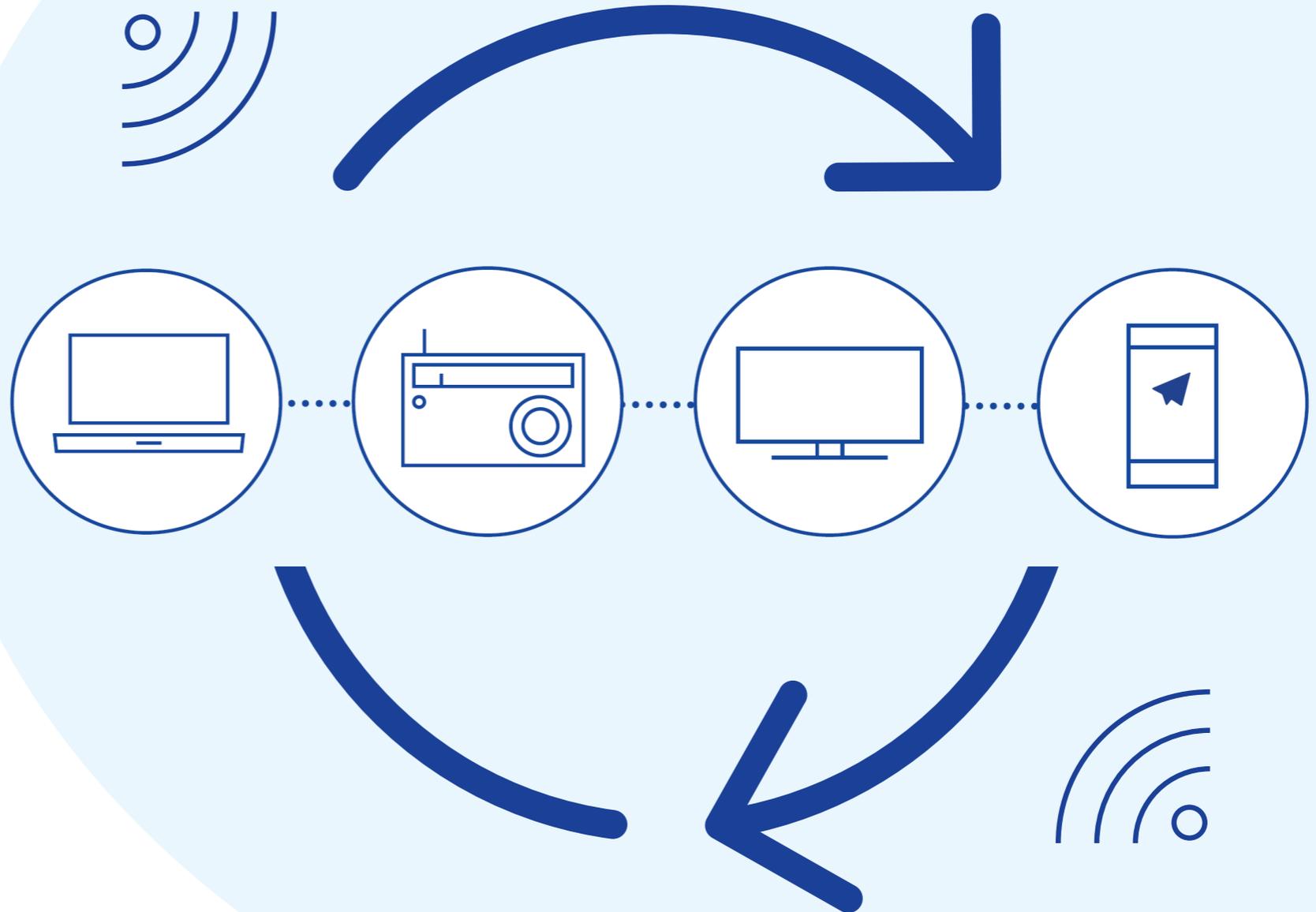
WHAT SCOPE FOR THE COLLECTION?

## LICENCE FEE IS NOT TECHNOLOGICALLY OBSOLETE

CONNECTED  
DEVICES  
ARE COVERED  
IN

**68%**

OF EBU MARKETS



# WHAT SCOPE FOR THE COLLECTION?

## FEE COVERS ALL CONNECTED DEVICES IN TWO-THIRDS OF COUNTRIES

In most EBU countries are connected devices included in the scope of the licence fee. In 2023, 15 EBU countries (68%) no longer limited the scope of their licence to traditional TV sets.

### No geographical trend

The map shows that there is no geographical trend for the inclusion of connected devices within the scope of the fee.

The group of countries where the fee is no longer based on any specific reception device is very diverse. It includes Germany and Switzerland thanks to their household charge, but also several North African countries plus Portugal and Serbia, where the fee is collected together with electricity bills and has long been disconnected from any notion of device ownership.

### Recent reforms expand scope of the fee

The licence fee has been reformed in many countries over the last few years to expand its scope and include all reception devices. Recent examples are not only the 2013 German and 2019 Swiss cases, but also the 2016 renegotiation of the licence fee settlement in the UK with the inclusion of the BBC iPlayer. The 2024 Austrian reform, turning the fee into a household charge, also aims at expanding the scope of the fee and solve the streaming gap.

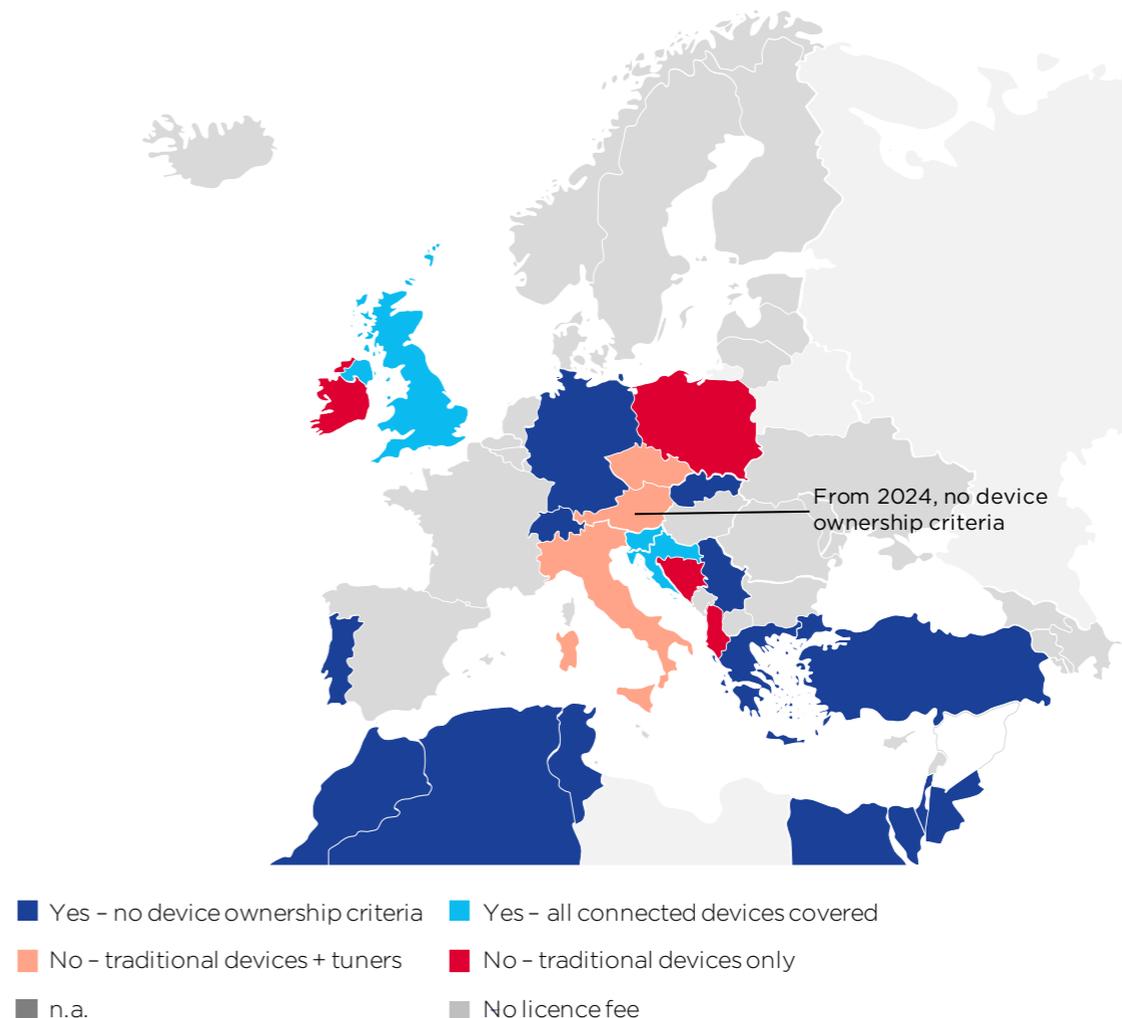
### Fewer countries have a strict definition of radio and TV sets

Over two-thirds of European countries with a fee have moved away from the traditional criteria of radio/TV reception-devices ownership (68%). The number of countries relying on the most traditional definition of radio and TV sets is therefore decreasing year after year.

In 2023, only four countries were still operating on the basis of this restricted definition: Albania, Bosnia-Herzegovina, Ireland and Poland. In three additional markets, Austria (until end 2023), Czechia and Italy, the fee was also covering devices including a tuner, which remains a rather restricted definition of a reception device.

Before it was dropped respectively in 2019, 2020 and 2022, the Swedish, Norwegian and French fees were all based on restricted definitions of reception devices. It is worth noting that one of the main motivation for abolishing the fee in these countries was the need to adapt to new consumption patterns and the growing number of households not owning any TV set.

### LICENCE FEE COVERS ALL CONNECTED DEVICES (2023)



Note: Slovakia included as the fee was dropped in July 2023 .

Sources: EBU based on Members' data

EBU Media Intelligence Service - Licence Fee 2023 (Public)

# WHAT SCOPE FOR THE COLLECTION?

## SECOND HOMES ARE SUBJECT TO FEE IN 41% OF THE COUNTRIES

Defining which households are subject to the licence fee is less complex than defining what devices are covered. However, the definition of what constitutes a household, for licensing purposes, may also vary from one country to another.

### Fee is usually charged to a group of persons

In 59% of EBU countries, for the purpose of the licence fee, a household is defined as a group of persons sharing a housing unit. This corresponds to the traditional definition of a household.

In such cases, the fee needs only to be paid once, and second homes are not subject to the fee. This is the case in countries such as Czechia, Slovakia and Switzerland.

### Sometimes, the fee is per home

In other cases, the licence fee applies to homes rather than households. A single household, with several dwellings, may be subject to several licence fees. In other words, second homes become liable to the fee. This was the case in at least seven EBU countries in 2023 (41% of markets where information was available).

The countries requiring an additional licence for second homes are often those where the fee is collected through the electricity billing system (Greece, Morocco, Portugal), as the fee naturally relates to the home.

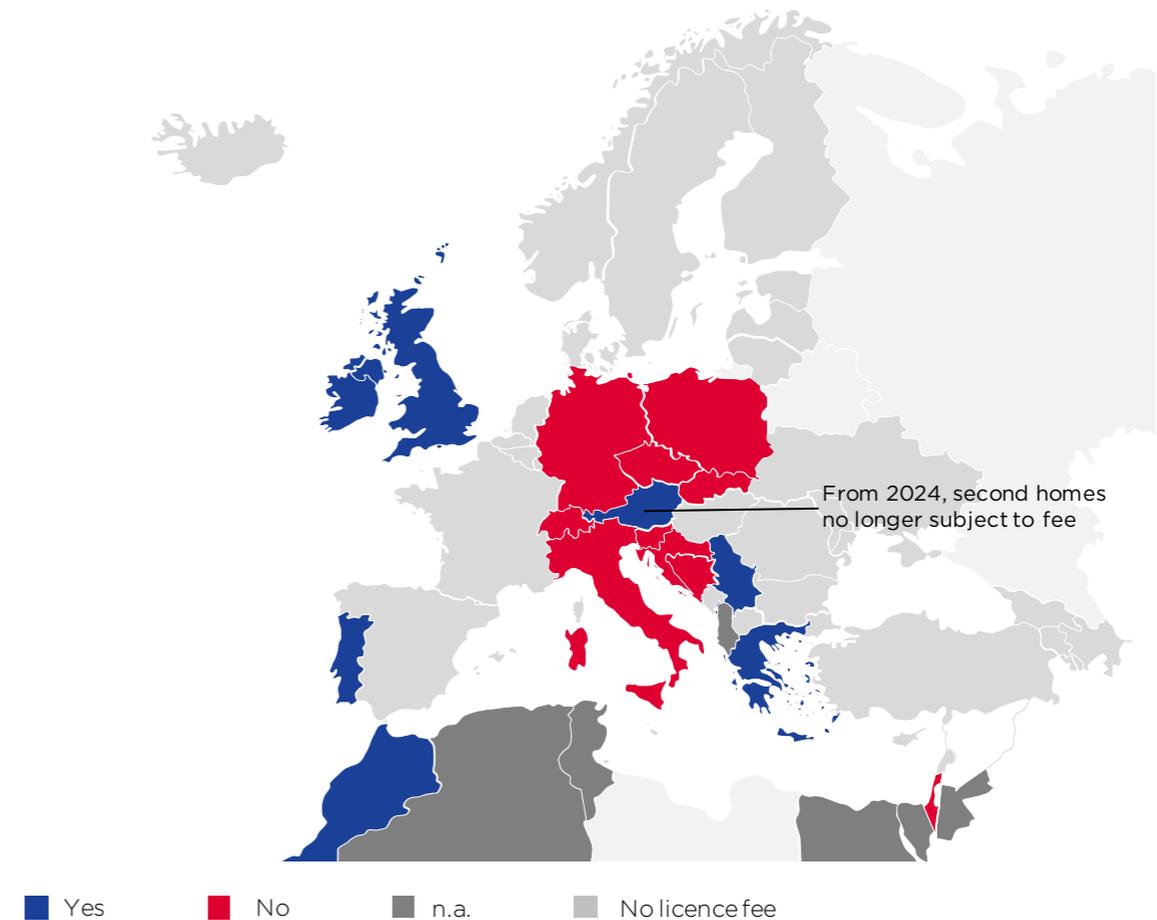
Second homes are also subject to the fee in several countries where the collection is organized differently, such as Austria, Ireland and the UK. However, in Austria, when the system will be turned into a household charge in 2024, second homes will no longer be included in the scope of the ORF fee.

### The 2018 ruling in Germany

In Germany, the fee has long been collected on a per-domicile basis. However, a decision by the Federal Constitutional Court in July 2018 (which found the fee constitutional) ruled that owners of more than one home should not have to pay the full fee for private use more than once. A fee-payer should not have to pay more than once for the same benefit, since this was incompatible with the principle of equality.

Collection of the fee was therefore adapted end 2019 and owners of several dwellings no longer pay several fees.

### LICENCE FEE FOR SECOND HOMES (2023)



Note: Slovakia included as the fee was dropped in July 2023 .

Sources : EBU based on Members' data

See also European Audiovisual Observatory/IRIS Merlin's [article on the German decision](#) by Sebastien Klein.

EBU Media Intelligence Service – Licence Fee 2023 (Public)

# WHAT SCOPE FOR THE COLLECTION?

## BUSINESSES SUBJECT TO THE FEE IN 95% OF CASES

Only in Albania are privately owned businesses exempt from the licence fee. In all other countries (94.7% of the total), they are liable. The payment system for privately owned businesses is less uniform than for households; hardly any countries operate the same system.

### Fixed fees

Fixed fees may be set per company, per business premises or per receiving device. In the first instance, companies pay the same as a household, i.e. the price of just one licence per company. This is the case for Austria (until end 2023) and the UK, for most businesses.

Meanwhile, in Greece, Ireland, Morocco and Portugal, the fee is paid according to the number of premises (sites).

Finally, in three other cases, the fee depends on the number of devices, with each one requiring a licence. This is the procedure in Croatia, Czechia and Poland.

### Variable fees

The unit price of the fee might also vary, depending on the size or the type of company.

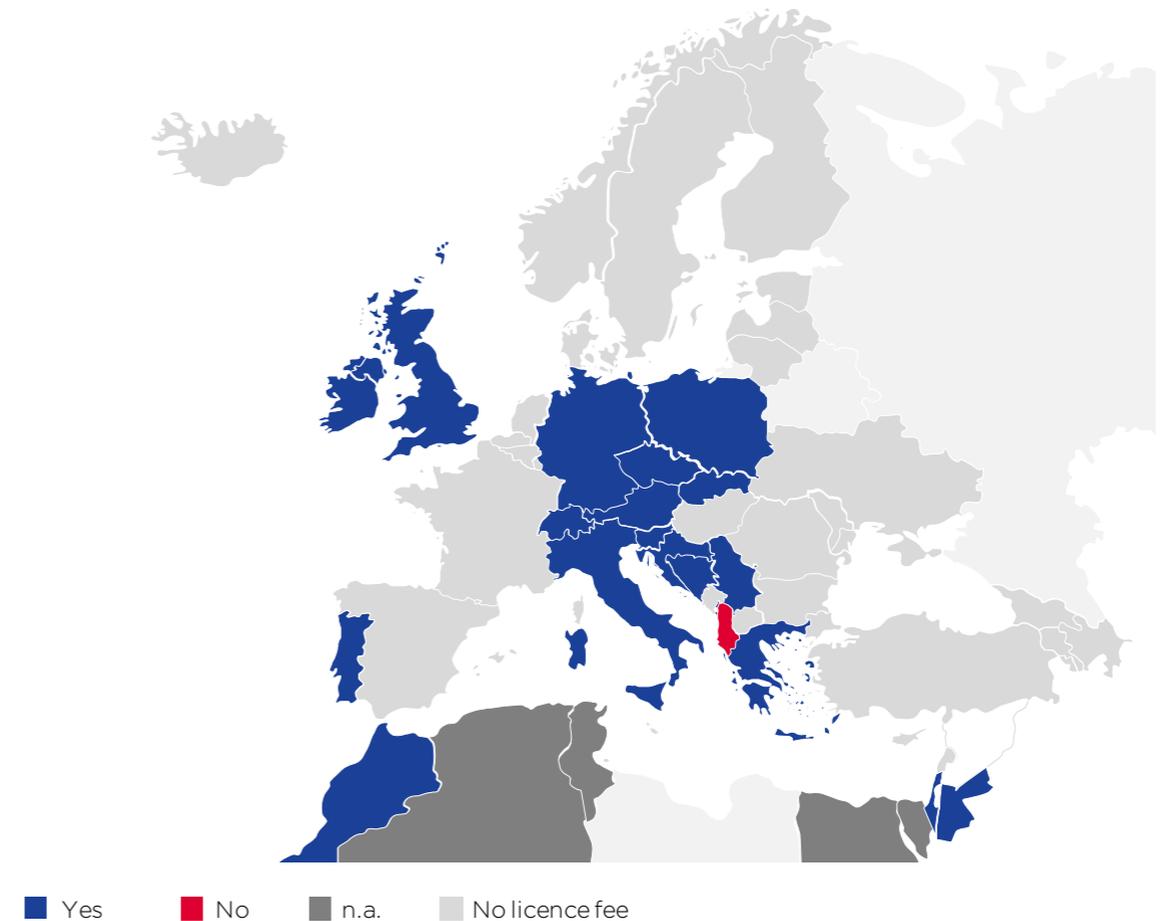
The first option is to base the unit price on the number of receivers. This happens, for instance, in Germany and Slovakia, where the fee is based on the number of employees. In Switzerland, the system changed in 2019 and was adapted again in 2021. From 2021, Swiss companies pay a variable fee, depending on their turnover - fees varies from CHF 160 to CHF 49 925, and companies with annual turnover <500 000 CHF are exempted.

Another way to distinguish between companies is through the nature of their business. Hotels benefit from specific regulations in the UK and Slovenia, where the first fee covers a certain number of TV sets and a reduced fee applies for every additional one. In Italy, the fee also depends on the type of activity - hotels, bars and restaurants, retail premises, etc.

The final distinction applied in some countries is the public or private use of the receiving device. In Slovenia, a higher fee is charged for receivers intended for public use.

Interestingly, in Austria from January 2024, the fixed business fee will be turned into a variable fee, based on the total wages paid to employees in the premises located in the municipality in the previous year.

## LICENCE FEE FOR BUSINESSES (2023)



Note: Slovakia included as the fee was dropped in July 2023 .

Sources: EBU based on Members' data and additional public data (audit court, parliamentary document, regulatory authority)

EBU Media Intelligence Service - Licence Fee 2023 (Public)

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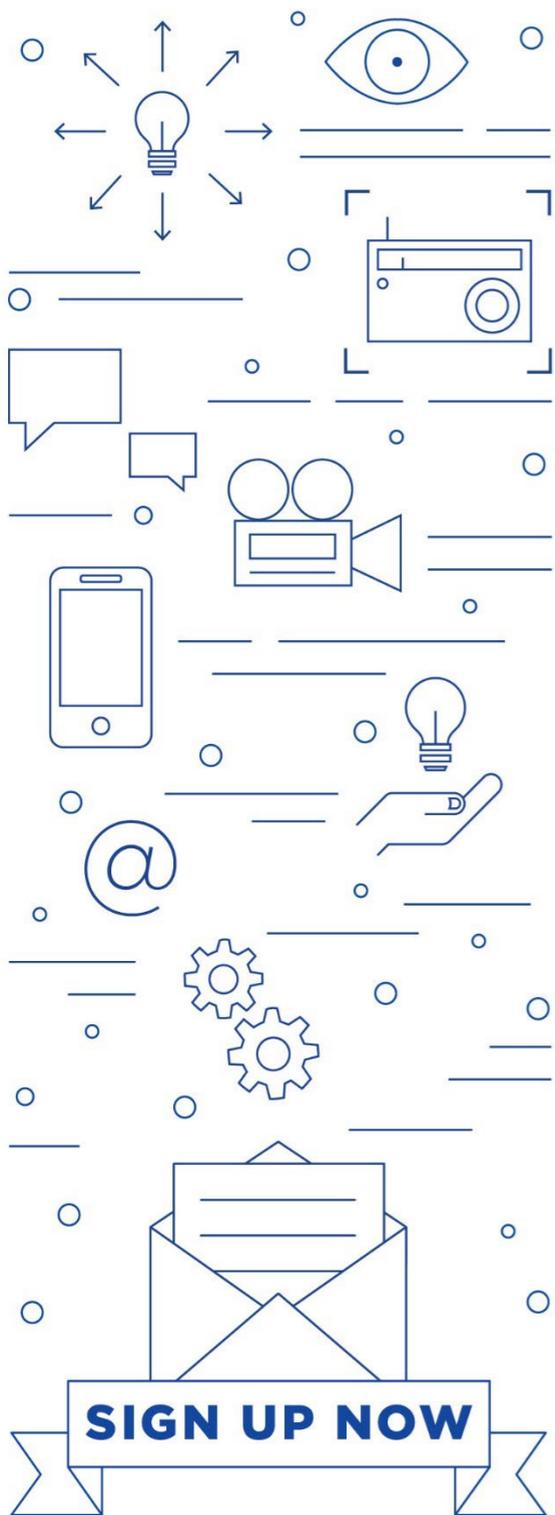


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We have 112 member organizations in 56 countries and have an additional 30 Associates in Asia, Africa, Australasia and the Americas.

Our Members operate nearly 2,000 television, radio and online channels and services, and offer a wealth of content across other platforms.

# MEDIA INTELLIGENCE SERVICE

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