

Overview of Nordic terrestrial television regulation

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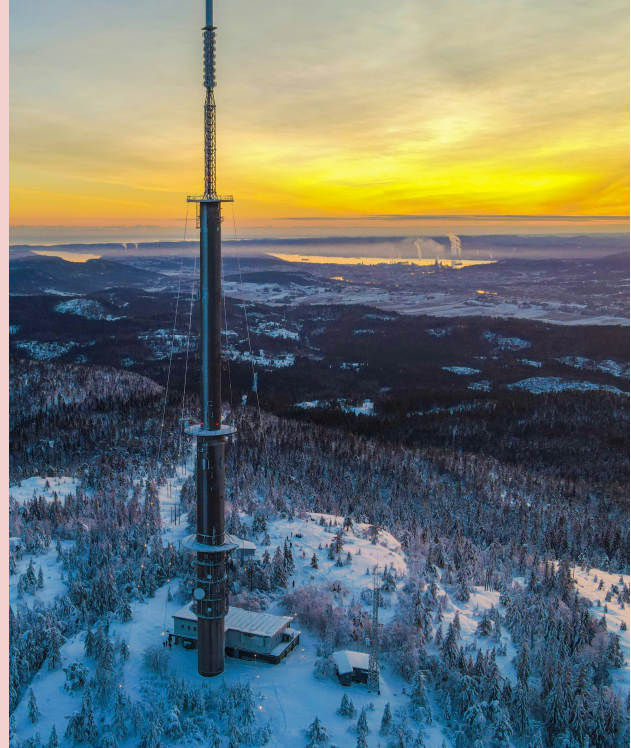


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This factsheet provides a brief overview of how television is structured and regulated in the Nordic countries: Denmark, Finland, Iceland, Norway, and Sweden. It outlines the legal and institutional frameworks governing licensing, terrestrial broadcasting, public service obligations, and must-carry rules.

Television in the Nordics operates within a shared European regulatory framework under the Audiovisual Media Services Directive (AVMSD), complemented by national legislation and media authorities in each country. Despite ongoing digital transformation and the growth of streaming services, terrestrial broadcasting infrastructure and public service media institutions remain central to ensuring universal access to news and nationwide television coverage, including in remote areas.

From broadcast television to audiovisual media services

Television offers a wide range of content including news, documentaries, sports, dramas, reality shows, and movies. Since its introduction in the 1950s, it has been a key source of information and democratic engagement.

The way we watch television has changed over the years. Digitalisation, high-speed Internet, and the rise of mobile devices have opened new ways to access audiovisual content. Today, streaming services, video-on-demand platforms, and user-generated content have emerged as alternatives to traditional broadcast television.

For many decades, television in the Nordic region relied primarily on linear broadcast channels delivered through analogue terrestrial networks. During the 2000s, these terrestrial networks were gradually digitalised into Digital Terrestrial Television (DTT) systems, enabling more efficient spectrum use, improved picture quality, and more channels.

Over time, distribution expanded to include cable and satellite and during the 2000s, and Internet Protocol Television (IPTV) emerged as a platform. In recent years, over-the-top (OTT) platforms, delivering video content directly over the open Internet, have become central.

Despite these developments, linear television continues to hold an important position within the media landscape, particularly among older age groups. However, it is no longer the default mode of viewing for the entire population. Younger audiences have replaced traditional viewing with digital consumption.

This factsheet provides an overview of the regulatory frameworks for television in each Nordic country. It describes the responsible authorities and the organisation of terrestrial broadcasting networks, licensing systems, public service broadcasting arrangements, and must-carry rules in Denmark, Finland, Iceland, Norway, and Sweden.

Regulating media and securing alerts in the EU

Audiovisual media in the Nordic countries operate within a broader European regulatory framework. The following section outlines the main EU rules governing audiovisual media services, media freedom, and public warning systems.

Audiovisual Media Services Directive

The Audiovisual Media Services Directive (AVMSD) is the joint framework regulating broadcasting, on-demand services, and video-sharing platforms in the European Union (EU) and the European Economic Area (EEA). It sets minimum rules for the protection of children, commercials, accessibility, and the promotion of European works and is based on the country-of-origin principle. This means that media is regulated by the laws of the country where it is established rather than by the rules of the country where its content is available. This ensures free movement of media services within the EU/EEA. All Nordic EU and EEA countries are covered or aligned with the directive: Sweden, Denmark, and Finland through EU membership and Norway and Iceland through the EEA Agreement. Åland follows the directive via Finland, while the Faroe Islands and Greenland fall outside the AVMSD framework.

European Media Freedom Act

The European Media Freedom Act (EMFA), which entered into force in 2024, complements the AVMSD by focusing on media pluralism, editorial independence, and transparency of ownership. While the AVMSD provides sector-specific rules for audiovisual content such as advertising limits and child protection, the EMFA introduces governance measures to safeguard democratic values and prevent political interference in media. Together, the two instruments form a complementary regulatory framework. The AVMSD sets the regulatory framework for audiovisual media services and related content obligations, while the EMFA reinforces institutional safeguards to protect media freedom, pluralism, and editorial independence across the EU.

As EU regulation, the EMFA applies directly to EU member states. For Norway and Iceland, participation depends on incorporation into the EEA Agreement, which requires a decision by the EEA Joint Committee.

Broadcast infrastructure and crisis communication

In major emergencies, terrestrial broadcasting remains a reliable way to reach large parts of the population. Terrestrial networks provide wide geographic coverage and can distribute information simultaneously to many people, including households without Internet access or subscription services. For this reason, broadcast infrastructure continues to play an important role in crisis communication and the distribution of public information.

At the EU level, the European Electronic Communications Code (EECC) requires member states to establish effective public warning systems capable of reaching end-users in cases of major emergencies. In practice, these systems are primarily implemented through mobile alerts, such as cell broadcast or location-based SMS messages. In parallel, national public service obligations and must-carry rules help ensure that essential information remains widely accessible through television and other media services. The International Telecommunication Union (ITU) also recognises broadcasting infrastructure as an important tool for disaster communication and public information.

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Terrestrial television in the Nordic countries

Television regulation in the Nordic region combines EU/EEA-level rules under the AVMSD with national legislation. Each country has its own media authority and licensing system. Despite some institutional differences, the systems share common core principles: protection of minors, advertising and sponsorship standards, accessibility requirements for persons with disabilities, editorial responsibility, and the promotion of national and European audiovisual works. Public service broadcasting remains a cornerstone of the Nordic media model, supported by stable funding mechanisms and strong legal mandates to ensure independence and universality. While public service in all Nordic countries covers both television and radio, only Sweden organises these in separate entities.

The following sections present each Nordic country separately, outlining the regulatory authorities, the organisation of the terrestrial television network, licensing arrangements, public service broadcasting structures, and must-carry rules.

Terrestrial television in Denmark

Regulatory authorities

Responsibility for media regulation is shared among several institutions:

- **The Danish Ministry of Culture** (Kulturministeriet) sets the overall strategy and legal framework for the media sector. It prepares media agreements, defines public service obligations, and updates legislation in response to technological and market developments.
- **The Radio and Television Board** (Radio- og tv-nævnet) is the main supervisory authority. It oversees broadcasters' adherence to rules on advertising, sponsorship, programme standards, and licensing. It also handles cases related to violations of media regulation.
- **The Danish Agency for Culture and Palaces** (SLKS/Slots- og Kulturstyrelsen) provides administrative and technical support to the Radio and Television Board. SLKS also publishes regulatory documents, including public service licences and guidelines, and carries out broader national cultural policy functions.
- **The Danish Agency for Digital Government** (Digitaliseringsstyrelsen) is responsible for spectrum management and the allocation of spectrum frequencies. It ensures efficient use of spectrum and prevents harmful interference between users, including across national borders.

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Terrestrial television network

The transition from analogue to DTT was completed on 1 November 2009. Since then, all television broadcasts sent through the antenna network have been digital.

Cibicom A/S, owned by the European equity fund Agilitas Private Equity LLP, owns and operates the nationwide broadcasting networks which are used for distributing DTT.

The network is divided into so-called multiplexes that carry different television channels. MUX 1 is reserved for free-to-air public service broadcasting and is operated by the public service broadcaster DR. It carries DR's public service channels, the main channel of state-owned broadcaster TV 2, which has public service obligations, and licensed non-commercial regional television stations (the so-called TV 2 regions).

The remaining multiplexes (MUX 2–5) are operated by Norlys (formerly Boxer), a Danish telecommunications and energy group owned by a cooperative of local utility companies. These multiplexes carry commercial television channels, most of which are encrypted and require a subscription, although some channels may be free-to-air.

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Permits for terrestrial television

Broadcasting via antenna requires two licences: a programme licence and a frequency licence.

A programme licence gives permission to provide television content via the terrestrial network, and they are issued by the Danish Radio and Television Board. An exception applies to DR and TV 2's main channel, which are directly authorised through the Danish Radio and Television Broadcasting Act.

Unlike DR, TV 2 operates under a commercial public service licence. And only the main channel holds a public service licence granted by the authorities. Other TV 2 channels operate under commercial broadcasting licences.

When a programme licence has been granted, a frequency licence may be issued by the

Danish Agency for Digital Government.

The legal framework for frequency licences for radio and television is set out in the Danish Frequency Act, as well as in the Executive Order on the Frequency Plan.

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Public service broadcasting

Denmark's public service system is run by Danmarks Radio (DR) and TV 2 Danmark together with eight TV 2 regional stations. DR operates under the public service contract for 2024–2026. DR must provide a broad and diverse portfolio of services across television, radio, and digital platforms. Its remit includes news, culture, education, children's content, drama, and coverage that reflects Danish society.

DR is a publicly funded, self-governed institution financed through general taxation, after the former licence fee was replaced by an income tax contribution from 2022 onward. Every Danish resident aged 18+ must contribute to DR through income tax: This revenue is allocated via the state budget – it is not a standalone fee.

TV 2 Danmark A/S is a state-owned public limited company. The broadcaster has carried public service obligations since 1988, when it was established as a national television broadcaster alongside DR. Today, these obligations are defined in a public service licence issued by the government, currently covering 2024–2026. The main channel, TV 2, must deliver programming that contributes to democratic debate, cultural life, regional relevance, and comprehensive news coverage. TV 2 is commercially funded, relying mainly on subscription revenues and advertising income. It no longer receives general licence-fee funding.

The eight regional TV 2 stations produce regional news, cultural programming, and community-focused content. They are independently run but form part of the wider TV 2 system. The stations are not owned by TV 2 Danmark, the state, or private companies, but operate as self-governing public institutions. Their funding is allocated through national media agreements and via the Danish state budget under the Ministry of Culture, amounting to approximately 500–600 million Danish kroner annually. While they

may generate limited additional income, their core financing is public and managed independently from TV 2 Danmark's commercial operations.

Denmark does not have privately owned public service television broadcasters.

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Must-carry obligations

The must-carry obligations in Denmark are laid out in the Radio and Television Broadcasting Act and apply to cable television networks and shared antenna systems. The purpose of the rules is to ensure that television content of public interest remains accessible to the population, regardless of the distribution platform chosen by viewers. The obligation does not extend to IPTV or OTT services.

The must-carry requirement primarily concerns public service content from DR and TV 2. This includes news programmes with sign-language interpretation and programmes with audio description for viewers with visual impairments. Also, Folketinget TV, which broadcasts proceedings from the Danish Parliament, is subject to must-carry. Compliance with the rules is supervised by the Radio and Television Board, which is responsible for enforcing the broadcasting legislation and handling cases of non-compliance.

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Terrestrial television in Finland

Regulatory authorities

Media regulation in Finland is shared across one primary regulatory authority and one main ministry, with a supplementary role played by a second ministry.

- **The Finnish Transport and Communications Agency (Traficom)** is the main supervisory authority. It issues programming licences for terrestrial television, supervises compliance with broadcasting rules, and oversees operator obligations for television and audiovisual media services.
- **The Ministry of Transport and Communications (LVM)** sets the overall policy direction and legal framework for the television and communications sector. The ministry prepares legislation, defines spectrum policy, and establishes the strategic conditions for terrestrial broadcasting and licensing systems.

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Terrestrial television network

The transition from analogue to DTT was completed on 1 November 2009. Finland ended all analogue terrestrial television transmissions in September 2007.

Digita Oy owns and operates the nationwide broadcasting networks used for DTT. Digita is a Finnish broadcast and telecommunications infrastructure company responsible for

maintaining and operating the countrywide network of transmission towers and technical facilities. As of late 2025, Digita Oy was owned by funds managed by DigitalBridge Group, Inc., although the company has reached an agreement to be acquired by GI Partners, with the transaction expected to close in the first quarter of 2026.

The DTT platform consists of multiplexes licensed by the Finnish Transport and Communications Agency (Traficom). Since 1 February 2026, the previous MUX B network has been merged into MUX A, and all nationwide free-to-air channels of public service broadcaster Yle continue within this reorganised multiplex with full national coverage. In addition to Yle's Swedish-language service (Yle Teema & Fem), Swedish-speaking viewers in Ostrobothnia also receive SveaTV, a terrestrial Swedish-language package.

Other multiplexes carry commercial channels, with coverage varying by region depending on the broadcaster's licence.

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Permits for terrestrial television

Finland's national spectrum authority, Traficom, manages and allocates spectrum frequencies and ensures that spectrum use is efficient and does not cause harmful interference to other users. While Digita operates the terrestrial transmission network, the underlying frequency assignments are made by Traficom in accordance with the Act on Electronic Communications Services (917/2014), which provides the legal framework for broadcasting and spectrum management in Finland.

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Public service broadcasting

Public service broadcasting in Finland is carried out by Yleisradio Oy (Yle).

Yle operates the national public service television channels Yle TV1, Yle TV2, and Yle Teema & Fem, which together cover news, current affairs, culture, entertainment, regional content, and minority-language programming.

Yle's activities are regulated by a specific law: the Act on Yleisradio Oy (22 December 1993/1380), commonly referred to as the Yle Act. The Act sets out provisions on Yle's mandate, governance structure, ownership, administration, and reporting obligations.

According to the Act, Yle shall, through its operations, promote freedom of expression, high-quality journalism, and diversity in the media. Yle shall also treat the Finnish-speaking and Swedish-speaking populations in Finland on an equal basis in its programming activities. The Swedish-language content that Yle produces, including news, is organised in a separate unit: Svenska Yle.

Yle is owned by the Finnish state.

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Must-carry obligations

Finland applies a statutory must-carry obligation under the Information Society Code (Act on Electronic Communications Services, 917/2014), which regulates electronic communications networks and services. The obligation requires telecommunications operators providing cable television services and administrators of shared antenna systems to transmit the television programmes of the Finnish public service broadcaster so they can be received by viewers without additional charges.

The must-carry obligation currently applies only to Yle's television services. Until mid-2025, Yle's radio services were also included in the obligation. The rules apply to traditional cable television networks and shared antenna systems, but do not extend to IPTV or OTT services.

Supervision and enforcement of the must-carry obligation are carried out by Traficom.

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Terrestrial television in Iceland

Regulatory authorities

Responsibility for media regulation in Iceland is divided between an independent supervisory authority and a responsible ministry.

The Icelandic Media Commission (Fjölmiðlanefnd) is the main supervisory authority. It oversees television broadcasters and audiovisual media services under the Media Act (No. 38/2011), which establishes the legal framework for media services in Iceland, including rules on licensing, advertising, protection of minors, and compliance with obligations stemming from the AVMSD. **The Ministry of Culture, Innovation and Higher Education** sets the overall media policy framework. The ministry prepares legislation, defines public service mandates, and represents Iceland in international and EEA media cooperation.

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Terrestrial television network

Iceland completed its analogue television switch-off in 2015.

The nationwide DTT network is operated through a broadcasting infrastructure developed by the public service broadcaster Ríkisútvarpið (RÚV) and the Digital Ísland system, originally run under the Vodafone Iceland name and now fully rebranded as Sýn after the discontinuation of the Vodafone brand in 2025.

The terrestrial platform carries RÚV's public service television channels as well as selected commercial services, ensuring universal reach and access to core broadcast content across the country. In addition to RÚV's own channels, Sýn also distributes its main television channel terrestrially, providing free-to-air access (exact multiplex details are not published) alongside its other distribution routes.

Alongside terrestrial broadcasting, both RÚV and Sýn distribute their content through IPTV platforms operated by Icelandic telecom providers and through broadband-based streaming and OTT services, such as SÝN+.

Although the DTT platform remains essential for nationwide coverage and for emergency communications. Most viewing occurs through IP-based platforms. Private broadcasters, including Sýn, have shifted their operations away from traditional broadcast distribution and toward Internet-based OTT delivery, with Sýn formally ending distribution of its linear and nonlinear channels over telecom-operated networks in 2025 in favour of app-based nationwide OTT access.

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Permits for terrestrial television

Any provider wishing to offer television broadcasting or audiovisual media services in Iceland must comply with national licensing and notification requirements under the Media Act.

Television broadcasters operating terrestrial services must obtain a broadcasting licence from the Media Commission. Licences may be issued as general licences, typically valid for up to seven years, or temporary licences, granted for shorter, defined periods (e.g., for special events or experimental services). The licensing framework is platform-neutral and applies to both linear broadcasting and on-demand audiovisual media services.

Licensing conditions cover editorial responsibility, rules on advertising and sponsorship, protection of minors, accessibility requirements, and compliance with the AVMSD, which is incorporated into Icelandic law through the EEA Agreement.

In addition to a content licence, broadcasters using terrestrial transmission must obtain access to radio frequencies under the Act on Electronic Communications. Spectrum management is administered by the Electronic Communications Office of Iceland (Fjarskiptastofa).

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Public service broadcasting

Public service broadcasting in Iceland is provided by RÚV, the Icelandic National Broadcasting Service.

RÚV's remit includes news and current affairs, cultural and educational programming, Icelandic-language content, programming for children and minorities, and coverage of democratic and national events. The Act emphasises editorial independence, universality of access, and the promotion of Icelandic language and culture. Each year, the Icelandic Media Commission conducts an independent review to determine whether RÚV has fulfilled its public service obligations.

RÚV operates as a public limited company wholly owned by the Icelandic state under the RÚV Act (Act on the National Broadcasting Service, No. 23/2013). The Act defines RÚV's mandate, ownership structure, governance framework, and financing arrangements. According to the Act, RÚV is required to provide comprehensive public service broadcasting for the entire population of Iceland across television, radio, and digital platforms.

RÚV's funding is primarily derived from a public service media tax, supplemented by limited advertising and sponsorship revenue.

Iceland does not designate privately owned broadcasters as public service providers under national law.

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Must-carry obligations

Must-carry and must-offer rules are set out in the Media Act (No. 38/2011) and are technology- and content-neutral. Rather than naming specific television channels, the legislation applies to media service providers that have editorial responsibility, serve a significant public interest, and are required to reach the general population.

In practice, these conditions are fulfilled only by RÚV. RÚV has a statutory public service remit and is required to provide comprehensive nationwide coverage, which justifies its inclusion under must-carry obligations. Commercial broadcasters do not have a comparable legal status and therefore depend on commercial distribution agreements rather than statutory must-carry rights. The Icelandic Media Commission is responsible for supervision and enforcement.

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Terrestrial television in Norway

Regulatory authorities

Responsibility for media regulation is shared between an independent supervisory authority and the responsible ministry.

- **The Norwegian Media Authority** (Medietilsynet) is the main supervisory authority. It supervises broadcasters and audiovisual media services, grants licences for DTT network and local broadcasting, and ensures compliance with advertising rules, protection of minors, and public service obligations.
- **The Ministry of Culture and Equality** (Kultur- og likestillingsdepartementet) sets the overall legal and policy framework for the media sector. The ministry prepares legislation, defines public service mandates, and represents Norway in international media policy cooperation.

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Terrestrial television network

The transition from analogue to digital terrestrial broadcasting was completed on 1 December 2009, following a region-by-region switchover that began in 2007. The transition was carried out as a commercial operation without government subsidies.

The DTT network is operated by Norges Televisjon AS (NTV), a joint venture owned in equal parts by the public service broadcaster NRK, commercial broadcaster TV 2, and Norway's dominating telecom company Telenor. NTV holds the licence to operate the terrestrial network and manages the multiplex capacity.

Norway's DTT network consists of five national multiplexes, which together provide capacity for both free-to-air and subscription-based television services. One multiplex is primarily used for NRK's public service channels, which are broadcast free-to-air and available to the entire population. The remaining multiplexes are used for commercial and pay-TV services distributed via the terrestrial platform.

The physical transmission infrastructure was historically owned and operated by Norkring AS, a subsidiary of Telenor. Following a restructuring in 2020, these assets were integrated into other parts of Telenor's infrastructure operations.

RiksTV, owned by the same partners as NTV, acts as the commercial distributor of pay television services on the terrestrial platform. While NRK's public service channels are broadcast free-to-air, commercial and subscription-based channels are marketed and sold to viewers through RiksTV.

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Permits for terrestrial television

Television broadcasters wishing to operate services via the terrestrial network in Norway must obtain a broadcasting licence from the Norwegian Media Authority. The requirement applies specifically to terrestrial transmission; broadcasting via satellite or online platforms does not require a terrestrial licence.

NRK's right to broadcast is established directly in law, while all other broadcasters must apply for a licence. Licences are typically issued for fixed periods and may include conditions relating to editorial responsibility, coverage obligations, advertising rules, protection of minors, technical standards, and other requirements set out in Norwegian broadcasting and audiovisual legislation. Norwegian broadcasting rules implement the AVMSD through the EEA Agreement, and broadcasters must meet the content and editorial standards derived from this framework.

Applications for terrestrial broadcasting must include relevant documentation, such as confirmation of a transmission agreement with the approved network operator.

In addition to the content-related licence, broadcasters that rely on terrestrial transmission must secure access to radio frequencies under Norway's electronic communications legislation. Spectrum management, including allocation and technical regulation of frequencies, is administered by the Norwegian Communications Authority (Nkom).

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Public service broadcasting

In Norway, public service broadcasting is carried out by two companies: the state-owned and publicly funded Norsk rikskringkasting AS (NRK) and the commercial broadcaster TV 2.

The fundamental legal framework governing NRK's organisation, ownership, purpose, and financing is laid down in the Broadcasting Act (Lov om kringkasting og audiovisuelle bestillingstjenester, Act of 4 December 1992 No. 127). According to Section 6-1 of the Act, NRK is mandated to provide public service broadcasting and related activities.

More detailed provisions concerning NRK's governance and organisation are set out in the company's Articles of Association. These state that NRK shall provide public service broadcasting services for the entire Norwegian population across television, radio, and other media platforms.

Since 2007, the Norwegian Parliament (Stortinget) has defined its requirements and expectations for NRK in a specific policy document known as the NRK Charter (NRK-plakaten). This document outlines the core principles and content obligations for NRK's services, in a manner comparable to public service licences in other Nordic countries. The charter has been revised several times, most recently in January 2023.

NRK is financed through a public broadcasting tax collected via the general taxation system.

In addition to NRK, the commercial broadcaster TV 2 has a public service agreement with the state. Under this agreement, TV 2 must fulfil obligations, including broadcasting daily national news on its main channel, providing Norwegian-language children's

programming on weekends, and investing in Norwegian film and drama production. The arrangement with TV 2 aims to strengthen media pluralism and ensure news production outside the Oslo region. TV 2's main headquarters are in Bergen. TV 2 must distribute its content on both linear and non-linear platforms. Since the latest TV 2 agreement with the state in 2024, TV 2 receives compensation up to 150 million Norwegian kroner annually.

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Must-carry obligations

Re-transmission of television services is regulated under the Broadcasting Act (Kringkastingsloven) and associated regulations. These rules govern licensing, re-transmission in cable networks, and public service obligations, but they do not establish a list of television channels that must be carried by all distribution networks.

Public service broadcasting, provided by NRK, is subject to specific legal obligations concerning nationwide availability and public interest content. However, Norwegian law does not use the concept of must-carry and does not impose obligations on network operators to carry designated channels. Oversight of re-transmission and broadcasting rules is exercised by the Norwegian Media Authority.

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Terrestrial television in Sweden

Regulatory authorities

Responsibility for media regulation in Sweden is shared between supervisory bodies, the spectrum authority, and the responsible ministry.

- **The Swedish Agency for the Media** (Mediemyndigheten) is the main supervisory authority. It grants broadcasting licences for terrestrial television (commercial broadcasters), supervises compliance with the Radio and Television Act, and oversees rules on advertising, sponsorship, accessibility, and protection of minors.
- **The Swedish Post and Telecom Authority** (PTS) is responsible for spectrum management and grants licences to use radio transmitters and frequencies for terrestrial television broadcasting.
- **The Ministry of Culture** (Kulturdepartementet) sets the overall legal and policy framework for the media sector. The ministry prepares legislation, defines public service mandates, and represents Sweden in EU-level media policy matters.

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Terrestrial television network

Sweden completed the transition from analogue to the DTT network on 15 October 2007, when the final analogue broadcasts were switched off. The switch-over was carried out gradually on a region-by-region basis between 2005 and 2007.

The nationwide terrestrial broadcasting networks for television and radio are operated by Teracom AB, a state-owned company. The terrestrial network is used for the distribution of television, DTT, and radio services (FM/DAB+).

The DTT platform is organised into multiplexes, each capable of carrying several television channels simultaneously. Historically, multiple multiplexes have been in operation, both public service and commercial broadcasters. However, structural changes have taken place. In January 2026, the national channel TV4 and the local channel TV Finland also ceased broadcasting via DTT. As a result, since 2 January 2026, only one multiplex remains in use: MUX 1, which is reserved for public service broadcasting and used by Sveriges Television (SVT) for its free-to-air channels. This multiplex is locally breakable, meaning that the same channel can carry region-specific content in different parts of the country, enabling SVT's regional news and other local programming.

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Permits for terrestrial television

Television broadcasting is regulated by the Radio and Television Act (2010:696). The purpose of the law is to protect freedom of expression while ensuring responsible use of broadcasting frequencies.

The Swedish Agency for the Media grants licences and supervises broadcasters to ensure compliance with Swedish media law. Television distributed via cable, satellite, or the Internet (streaming) usually do not require a licence but must follow the rules of the Radio and Television Act, including regulations on advertising, sponsorship, and protection of minors.

Broadcasting television via terrestrial network requires a government licence. The public service broadcaster, Sveriges Television (SVT), is licensed by the government, while commercial broadcasters are licensed by the Swedish Media Authority.

The use of spectrum frequencies for terrestrial television requires authorisation from the Swedish Post and Telecom Authority.

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Public service broadcasting

In Sweden, public service broadcasting is carried out by three companies: Sveriges Television AB (SVT), Sveriges Radio AB (SR), and Sveriges Utbildningsradio AB (UR). SVT provides public service television, SR provides public service radio, and UR produces educational programming for both television and radio as well as online platforms.

Sveriges Television AB include the main channels SVT1, SVT2, SVT Barn, SVT24, and Kunskapskanalen (the latter operated jointly with UR). UR provides educational content broadcast via SVT's channels and digital platforms.

The fundamental legal framework governing public service broadcasting in Sweden is laid down in the Radio and Television Act (2010:696). The overall mission, remit, and operational conditions of the public service companies are further defined by decisions of the Swedish Parliament (Riksdagen) for each broadcasting period. The current framework for 2026–2033 sets out the requirements concerning independence, content obligations, accessibility, regional presence, and the promotion of democratic values.

The public service companies are formally owned by the Administrative Foundation for Sveriges Television AB, Sveriges Radio AB, and Sveriges Utbildningsradio AB. The foundation was created to promote independence for the public service companies; it owns and manages all shares in the three companies and is intended to function as a buffer between the government and the broadcasters.

Since 2019, Swedish public service broadcasting has been financed through an income-based public service fee collected via the tax system and administered by the Swedish Tax Agency (Skatteverket). Formulärets nederkant

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Must-carry obligations

The must-carry obligations are regulated under the Radio and Television Act (2010:696). The rules aim to guarantee universal access to public service television and apply to both cable television networks and IPTV network operators. Must-carry services must be provided to households without additional charge.

The obligation covers the main public service television channels SVT1, SVT2, SVT Barnkanalen, SVT24, Kunskapskanalen, and educational programming produced by UR when broadcast on SVT channels. In certain cases, local television channels may be subject to must-carry obligations if specific legal conditions are fulfilled. The Swedish Agency for the Media is responsible for supervising compliance with the must-carry provisions and for ensuring that network operators meet their obligations.

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Summary

This factsheet provides an overview of how terrestrial television is organised and regulated in Denmark, Finland, Iceland, Norway, and Sweden. It outlines key aspects of each national system, including regulatory authorities, terrestrial broadcasting networks, licensing frameworks, public service arrangements, and must-carry rules.

Across the region, television operates within a shared European regulatory framework, primarily shaped by the Audiovisual Media Services Directive (AVMSD) and implemented through national legislation and supervisory authorities.

While the Nordic national systems share similar structures, they differ in their implementation. These differences can be summarised as follows:

- **Regulatory authorities:**
Each country has a designated media authority alongside a responsible ministry, but institutional arrangements vary. Finland follows a more centralised model, whereas Denmark and Sweden distribute responsibilities across several bodies. Norway and Iceland have more streamlined structures, with a primary media authority supported by separate technical regulators.
- **Terrestrial television network:**
All Nordic countries have transitioned to digital terrestrial television (DTT), but systems differ. Denmark, Norway, and Finland operate multiple multiplexes carrying both public service and commercial channels. In Sweden, the network has been reduced to a single public service multiplex since 2026. Iceland has a smaller and more centralised system, where the terrestrial platform carries RÚV's public service channels alongside selected commercial services.
- **Permits for terrestrial television:**
Terrestrial broadcasting generally requires licences, though systems differ by country. In Denmark, a dual system applies, requiring both a programme licence and a frequency licence. However, DR and TV 2's main channel are authorised directly by law and operate under public service frameworks rather than standard programme licences.

In Norway and Sweden, public service broadcasters are similarly authorised by law or government decisions, while commercial operators must obtain licences from the relevant media authorities, along with separate spectrum approval.

Finland centralises both programme licensing and spectrum management under Traficom. In Iceland, broadcasters must obtain a licence from the Media Commission and secure frequency access separately.

- **Public service broadcasting:**

Public service broadcasting is a central component across the Nordic countries, though organisational models differ. Finland and Iceland operate centralised systems with a single provider (Yle and RÚV respectively). Denmark and Norway use hybrid models, where publicly funded broadcasters (DR and NRK respectively) operate alongside commercially funded broadcasters with public service obligations (TV 2). Sweden stands out with a multi-institutional structure, where SVT (television), SR (radio), and UR (educational content) operate as separate entities. Across all countries, public service broadcasting is primarily tax-funded and supported by strong legal mandates ensuring independence and universal access.

- **Must-carry obligations:**

Must-carry rules ensure access to public service content but vary across countries. Denmark, Finland, and Sweden require operators to carry public service channels, with Sweden also covering IPTV. Iceland applies principle-based rules that in practice cover RÚV. Norway does not have formal must-carry obligations, relying instead on general public service requirements.

In conclusion, the Nordic television landscape reflects a balance between continuity and change. While digitalisation and shifting viewing habits have transformed how audiences access content, the core structures of terrestrial broadcasting and public service media remain firmly in place. Across the region, these systems continue to play a key role in safeguarding accessibility, supporting democratic participation, and ensuring that reliable information reaches the entire population.

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