Services Trade Restrictiveness Index: Broadcasting

Key findings

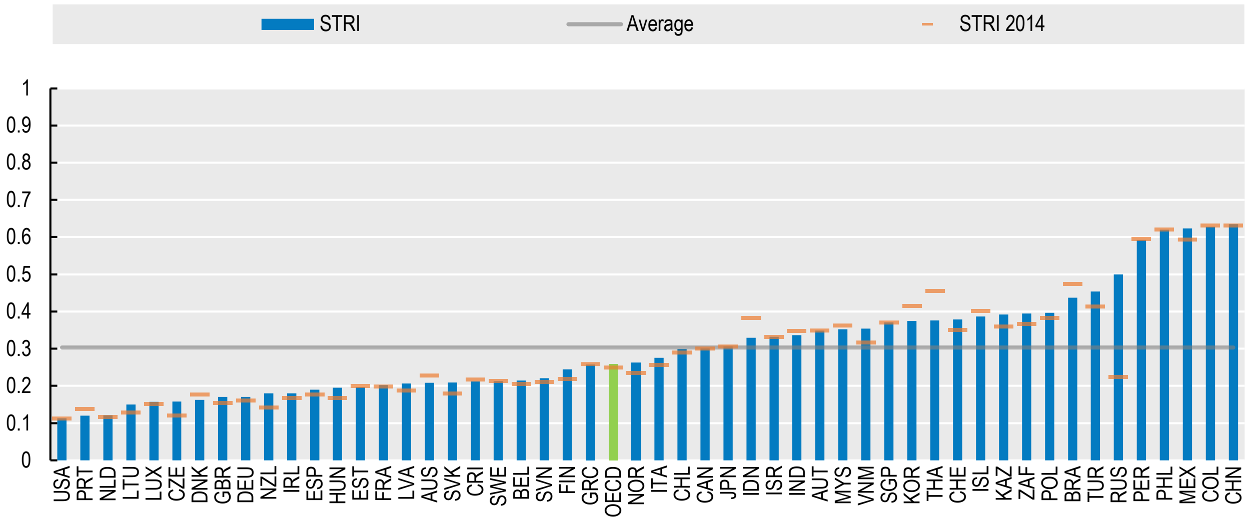
- The average 2024 STRI in the broadcasting sector is 0.3 out of a maximum of 1 (most trade restricted), indicating a relatively high overall level of restrictiveness. However, individual country scores diverge considerably, ranging between 0.11 and 0.64.
- The best performing countries in the sector are the United States, Portugal, and the Netherlands. Most reforms in 2024 were recorded in Greece.
- In this sector, barriers related to restrictions on foreign entry are most prominent and amount to 64% of all restrictions in OECD economies and 79% in non-OECD economies.

Television and broadcasting include television programming and broadcasting activities (ISIC Rev 4 code 591 and 602). Television services are increasingly bundled with telecommunications services in the marketplace. Telecommunications operators often offer Internet Protocol Television (IPTV) as part of so-called triple play or quadruple play packages (broadband, television and telephone; adding mobile for quadruple play), and in some cases broadcasters have become telecommunications operators. In addition to linear broadcasting, video on demand has become an increasingly important distributor of audio-visual content. Furthermore, there are a host of suppliers offering streaming or downloading on the Internet.

The 2024 STRIs in the broadcasting sector range between 0.11 and 0.64, with a sample average of 0.30 (Figure 1). There are 28 countries below and 23 countries above the average. The best performing countries in the sector are the United States, Portugal, and the Netherlands.

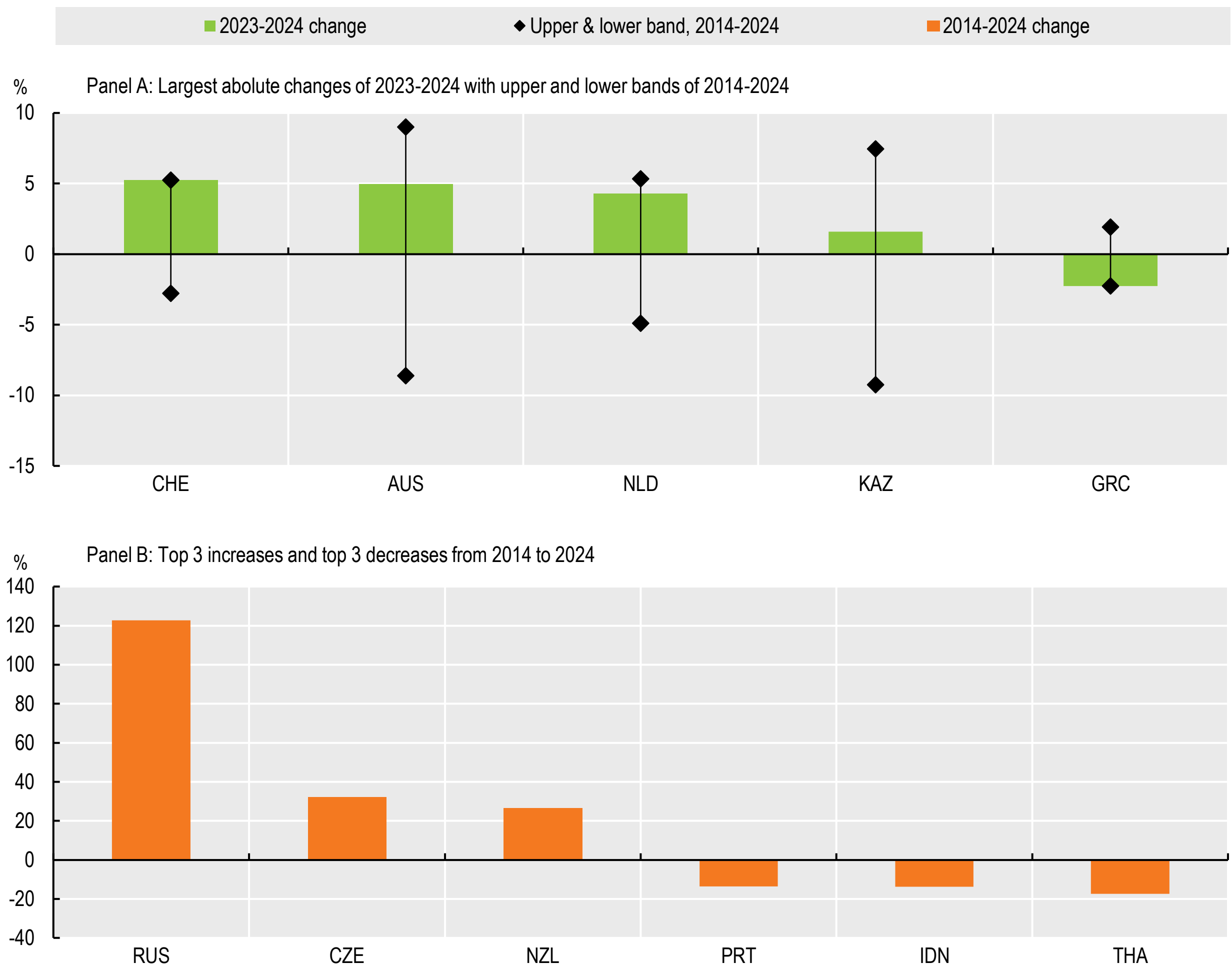
Several countries introduced regulatory changes affecting the STRIs in 2024 and more so since 2014 (Figure 2). In 2024, the STRIs in this sector saw the biggest policy changes in Switzerland (5%), Australia (5%), the Netherlands (4%), Kazakhstan (2%), and Greece (-2%). Since 2014, on the one hand, countries that have had the strongest restrictive trends in the broadcasting services sector include the Russian Federation (123%), Czechia (32%) and New Zealand (27%). On the other hand, strong liberalisation has taken place in Thailand (-17%), Indonesia (-14%), and Portugal (-14%).

Figure 1. STRI in broadcasting services, 2024



Source: OECD (2024). STRI database.

Figure 2. Change in the last year and since 2014, by country

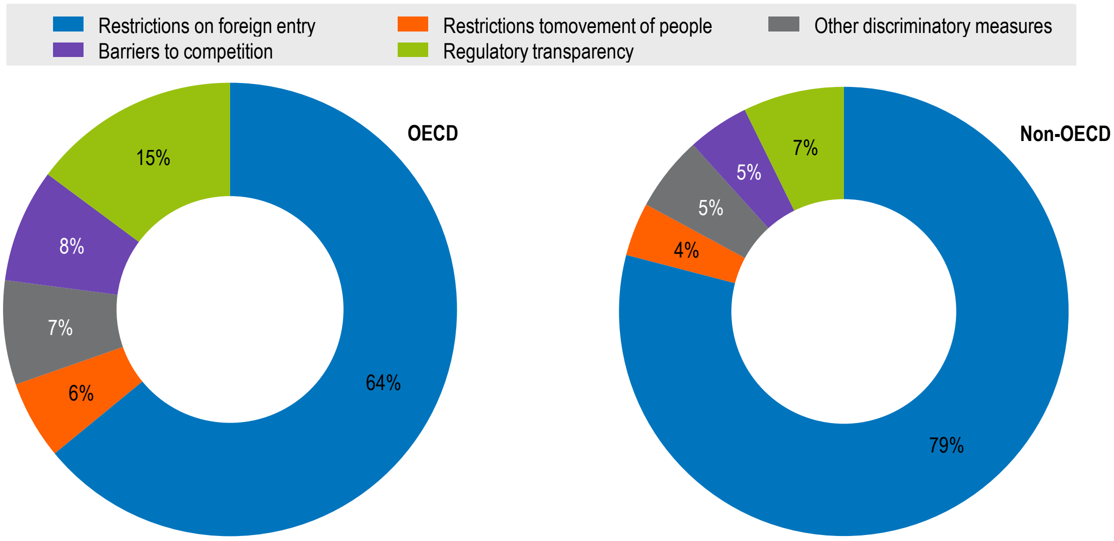


Note: Selection criteria for Panel A was based on largest absolute changes since 2023. Panel B selection show the three largest increases, and the three largest decreases in the STRI since 2014.
Source: OECD (2024). STRI database.

The measures in the STRI database are organised under five policy areas (Figure 3). Restrictions on foreign entry include barriers related to establishing and operating companies such as foreign equity limits or requirements on board of directors and cross-border data flows. Restrictions on the movement of people cover barriers that affect the temporary entry of foreign services providers through quotas, labour market tests and short durations of stay. Other discriminatory measures include discrimination of foreign services suppliers as far as taxes, subsidies and public procurement are concerned. Barriers to competition include information on anti-trust policy, government ownership of major firms and the extent to which government-owned enterprises are exempt from competition laws. Regulatory transparency includes information on consultations and dissemination prior to laws and regulations entering into force. It also records information on obtaining a license or a visa.

In the broadcasting sector, barriers related to restrictions on foreign entry are most prominent and amount to 64% of all restrictions in OECD economies and 79% in non-OECD economies.

Figure 3. STRI for broadcasting services by policy areas in OECD and non-OECD economies, 2024



Source: OECD (2024). STRI database.

There are no countries that are fully closed to trade in this sector.

Table 1 lists the most relevant restrictions identified in each policy area. Under restrictions on foreign entry, common impediments consist of limits to the proportion of shares that can be acquired by foreign investors in publicly controlled firms, investment screening mechanisms, barriers to the acquisition and use of land and real estate, and residency requirements for key personnel. Additionally, in 40 out of the 51 countries in the sample, broadcast time is regulated by quotas reserving a certain duration of transmission time to locally produced programmes. Finally, foreign equity limits are also present but to a lesser degree: some countries limit equity caps to terrestrial broadcasting only while leaving cable and satellite TV open to foreign investment. Others treat all platforms equally.

Restrictions to the movement of people are relatively common across the board and include mostly labour market tests and short permitted durations of initial stay. Under other discriminatory measures, common restrictions relate to cultural tests for subsidies to audio-visual work. Indeed, many countries use subsidies as a means for pursuing cultural and educational objectives. Furthermore, barriers to accessing public procurement markets remain an important challenge for foreign tenderers in many jurisdictions.

As for barriers to competition, in almost all STRI countries the government controls at least one major TV channel. There are restrictions on advertising in 38 countries; general requirements related to minimum capital for new companies are present in 36 jurisdictions; and in more than half of the countries there is at least one dominant broadcaster. Under barriers related to regulatory transparency, procedural hurdles related to business visas are the most common challenges in this sector. In addition, the public consultation process for new legislative instruments falls short of best practice in nine countries while broadcasting licences are granted in a non-transparent manner in four STRI countries.

Table 1. Top 5 most relevant measures by policy area, 2024

Policy area	Measure	Countries having a restriction[1]
Restrictions on foreign entry	There are limits to the proportion of shares that can be acquired by foreign investors in publicly-controlled firms	45
	Screening exists without exclusion of economic	41
	Broadcast time is regulated by quotas	40
	Acquisition and use of land and real estate by foreigners is restricted	36
	Board of directors: at least one must be resident	31
Restrictions to movement of people	Labour market tests or similar economic considerations: intra-corporate transferees	38
	Labour market tests or similar economic considerations: contractual services suppliers	38
	Labour market tests or similar economic considerations: independent services suppliers	35
	Limitation on duration of stay for contractual services suppliers	34
	Memo: Licence or authorisation is required to practice	14
Other discriminatory measures	Public procurement: Procurement regulation explicitly prohibits discrimination of foreign suppliers	45
	Subsidies and tax breaks for audio-visual work are subject to cultural tests	33
	Public procurement: The procurement process affects the conditions of competition in favour of local firms	31
	Public procurement: Explicit preferences for local suppliers	28
	Memo: The procurement process below the value thresholds affects the conditions of competition in favour of local firms	20
Barriers to competition	National, state or provincial government controls at least one major TV channel	46
	Restrictions on advertising	38
	Minimum capital requirements	36
	Public TV channels are subject to rules that affect the competition with private broadcasters	35
	Memo: There is at least one dominant broadcaster	30
Regulatory transparency	Visas on arrival or visa exemption are available for temporary entry/transit of crew	45
	Range of visa processing time	32
	Number of documents needed to obtain a business visa	28
	There is an adequate public comment procedure open to interested persons, including foreign suppliers	9
	Broadcasting licences are granted in a transparent manner	4

Note: The count for “memo” type of measures, which are not scored in the STRI, indicates the number of positive answers recorded for that measure across the 51 countries covered. The topmost relevant measures are selected on the basis of the following criteria: (1) most restricted horizontal measures (i.e. same answer across sectors), (2) most restricted sector-specific measures, (3) key measures or (4) memos affecting the score of other measures through hierarchy rules.
Source: OECD STRI database (2024).

More information

» Access all country notes, sector notes, and interactive STRI tools at oe.cd/servicestrade.

» Read more on evidence from ten years of monitoring services trade policies through the STRI in Revitalising Services Trade for Global Growth.

» Learn more about current services trade issues on the OECD website.

» Contact the OECD Trade and Agriculture Directorate with your questions at stri.contact@oecd.org.

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The STRI indices take values between zero and one, one being the most restrictive. The STRI database records measures on a Most Favoured Nation basis. Air transport and road freight cover only commercial establishment (with accompanying movement of people). The indices are based on laws and regulations made public by 31 October 2024 and in force on 31 December 2024. The STRI regulatory database covers the 38 OECD Members, Brazil, China, India, Indonesia, Kazakhstan, Malaysia, Peru, the Philippines, the Russian Federation, Singapore, South Africa, Thailand and Viet Nam. The statistical data for Israel are supplied by and under the responsibility of the relevant Israeli authorities. The use of such data by the OECD is without prejudice to the status of the Golan Heights, East Jerusalem and Israeli settlements in the West Bank under the terms of international law

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