

STRATEGIC PROJECT

2023/2025

Building the audiovisual and digital regulation of tomorrow

Created on 1 January 2022, Arcom is celebrating its first year of existence. This new institution is evolving in a rapidly changing audiovisual and digital landscape, marked by considerable technological advances, the arrival of international stakeholders and rapidly changing audience habits.

The scope of its missions and their importance with regard to the challenges of social cohesion – representing society’s diversity on the screen, preserving pluralism, fighting misinformation, protecting creation, etc. – create strong and legitimate expectations vis à vis the regulator.



In view of the rapid changes in our environment, we have decided, together with the Commissioners and the Authority's services, to draw up a strategic plan to share our priorities to achieve by 2025. These are broken down into four objectives: providing better protection for the public, providing better support for the transformation of the audiovisual and digital sector, participating in the development of a European regulation and continuing to modernise our operations. These four focuses should help us to build the future of audiovisual and digital regulations together.

With this approach, we want to reaffirm our priority: to be useful to the public. Far from being a mere guardian of standards, Arcom works every day to ensure that all French people have access, throughout the country, to a quality audiovisual offer that entertains, interests, and represents them, to a plurality of programmes and points of view, to reliable, independent information; Arcom commits itself every day to ensuring that everyone can surf the internet in confidence and security, that culture is compensated at its fair value, and that sport retains, through its place on the airwaves, its role as a unifying force.

With the creation of Arcom, we have demonstrated our collective capacity to transform audiovisual and digital regulation: now we want to go further to anticipate new developments and prepare for tomorrow's model together.

ROCH-OLIVIER MAISTRE
Chair of Arcom

THE CHALLENGES OF A STRATEGIC REFLECTION FOR ARCOM



"The French system of support for cinematographic and audiovisual creation has proven its solidity over the long term: it is now a question of taking it to a new level in the face of the upheavals under way, by demonstrating innovation and confidence in the stakeholders."

JEAN-FRANÇOIS MARY

Chair of the Working Group - Audiovisual, Film and Music
Creation and Production



"The digital revolution and the pandemic have amplified the impact of audiovisual media on society and the daily lives of the French people. The regulator must meet the expectations of listeners, viewers, and internet users in terms of public and consumer protection, social cohesion, and media, information and digital citizenship literacy."

CAROLE BIENAIMÉ BESSE

Chair of the Working Group - Education, Audience Protection and Social Cohesion
in Audiovisual and Digital Media



"With digital technology, radio has entered a new technological, economic and media era, which means that it must embrace new uses without abandoning what has made it successful for a hundred years: it is now essential that Arcom accompany the sector in this revolution."

HERVÉ GODECHOT

Chair of the Working Group - Radio and Digital Audio



"In our increasingly digital societies - for better and sometimes for worse - Arcom is strongly committed to the implementation of the EU Digital Services Act to make operators more accountable: together with our various partners and counterparts, we can create trusted digital environments."

/ BENOÎT LOUTREL

Chair of the Working Group - Supervision of Online Platforms



"We must place the challenges of regulation under the angle of the revolution of digital technology and uses, which modifies the entire value chain of audiovisual activity: from the financing of content to its access to audiences, including changes in the business models of media services providers."

/ JULIETTE THÉRY

Chair of the Working Group - Television, On-Demand Audiovisual Media Services, Distribution and Digital Uses



"Our primary mission is to protect the precious asset of freedom of expression, by acting to preserve the pluralism of the audiovisual media and the ethics of their programmes: one of the major challenges for Arcom will be to adapt these commitments to new uses and new stakeholders."

/ ANNE GRAND D'ESNON

Chair of the Working Group - Pluralism and Ethics in Programming



"Arcom is deploying a renewed, ambitious regulation for the protection of creation and sport events on the internet, so that the digital world remains an opportunity for the cultural development of our fellow citizens and for enhancing social cohesion through the unifying values of sport."

/ DENIS RAPONE

Co-Chair of the Working Group - Protection and Communication of Creative Work and Sports Content on the internet



"The ongoing challenge for the audiovisual and digital regulator, faced with the multiplication of violent or illicit content on the air and online, is to strike a balance between the preservation of fundamental freedoms and the protection of rights and public order."

/ LAURENCE PÉCAUT-RIVOLIER

Co-chair of the Working Group - Protection and Dissemination of Sports Creation and Content on the internet and qualified to supervise the blocking of terrorist or child pornography content

ARCOM TODAY

OUR HISTORY

Created by law and heir to forty years of regulation, the Autorité de régulation de la communication audiovisuelle et numérique was born on **1ST JANUARY 2022** out of the merger of the Conseil supérieur de l'audiovisuel (CSA) and the Haute Autorité pour la diffusion des œuvres et la protection des droits sur internet (Hadopi).

OUR ORGANISATION

AN INDEPENDENT PUBLIC INSTITUTION with 9 permanent Commissioners appointed by 5 different authorities and **370 STAFF MEMBERS**, based in Paris and in its 16 regional and overseas offices.



OUR PURPOSE

GUARANTEEING FUNDAMENTAL PUBLIC FREEDOMS of communication and expression in audiovisual and digital spaces.



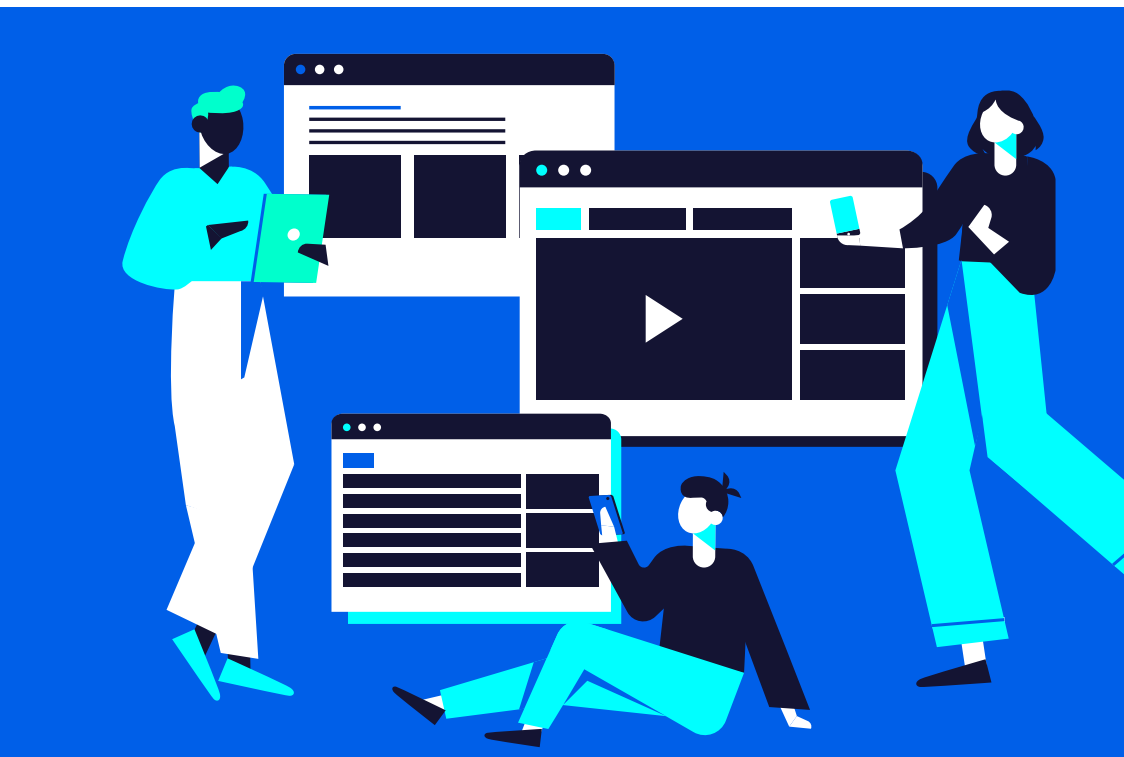
OUR MISSIONS

- / **OVERSEEING** the democratic and societal responsibilities of audiovisual media and online platforms.
- / **GUARANTEEING** pluralism of the audiovisual news media and the independence of public broadcasting.
- / **ENSURING** the economic balance of the sector and **SUPPORTING** creation.

THE CHALLENGES OF AN AUDIOVISUAL AND DIGITAL ENVIRONMENT IN FULL TRANSFORMATION

The principles on which audiovisual regulation was based in the 1980s are as relevant as ever; the sector, however, bears little resemblance to what it was then. Profound changes have taken place and accelerated in recent years. They change the framework of analysis and action of the regulator, whose missions in the service of the public are diversifying and are now part of a European framework.

The audiovisual landscape is changing, as a result of digital transformation, with new stakeholders and changing audience habits.



TECHNOLOGICAL DEVELOPMENTS HAVE LED TO AN INCREASE IN THE NUMBER OF DISTRIBUTION CHANNELS AND THE ASSOCIATED INVESTMENTS.

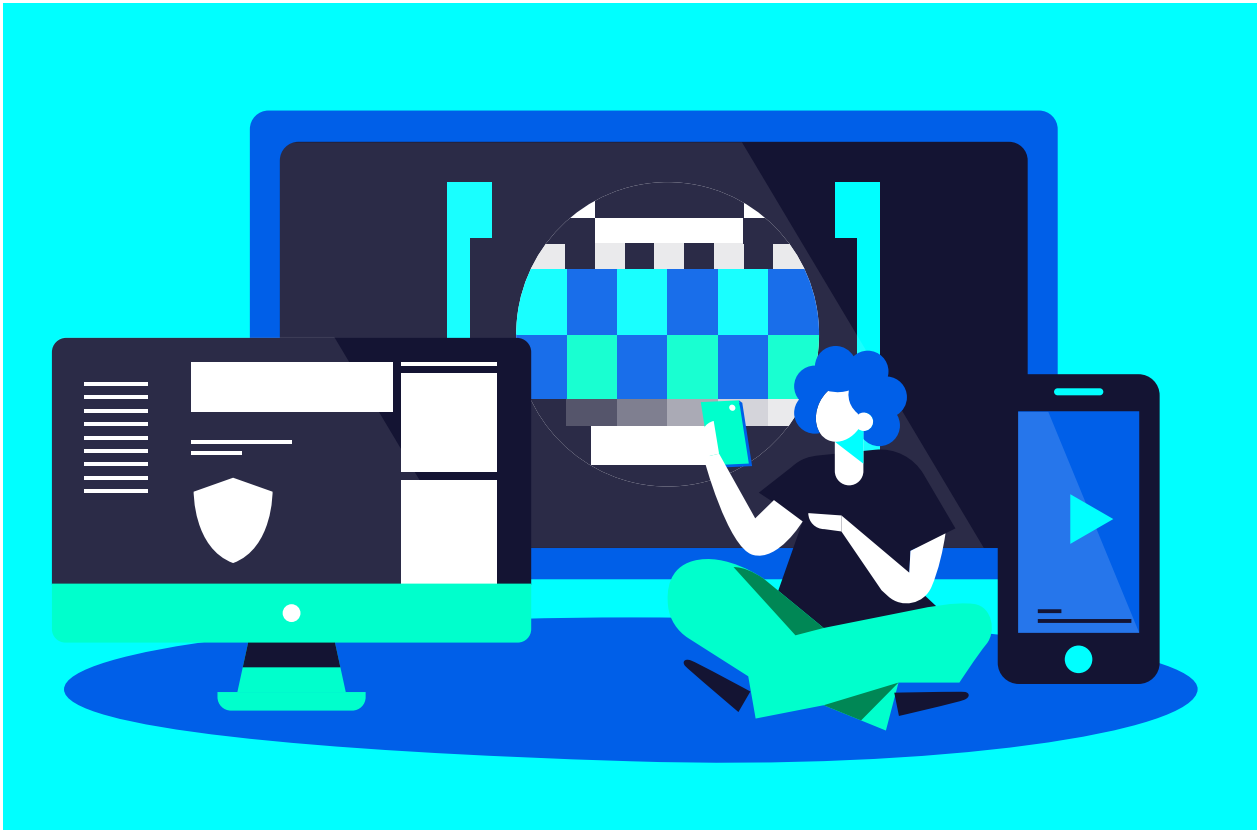
Television and radio are now offered through various distribution channels which are alternatives to solely terrestrial reception on a dedicated terminal: Internet Service Providers' box, reception of over-the-top (OTT) internet via connected terminals... The need to invest in new digital media, such as web platforms or mobile applications, as well as in new programme formats adapted to non-linear uses, such as podcasts, is growing for the stakeholders. Such changes are accompanied by an increase in the number of screens, of which there are now an average of nearly 6 in French households, especially due to the heavy increase in individual smartphones.

"The audiovisual landscape is undergoing a profound reorganisation, marked in particular by consolidation strategies"

THE AUDIOVISUAL OFFER OF INTERNATIONAL STAKEHOLDERS WITH CONSIDERABLE FINANCIAL POWER IS CHANGING THE ECONOMIC BALANCE OF THE LANDSCAPE.

This situation creates growing competition for national groups in the acquisition and broadcasting of new programmes, both in the audiovisual and film sectors, and in access to talent, while the growth in advertising revenue is almost entirely captured by the digital offer. The arrival of video-on-demand platforms has also led to an unprecedented increase in the number of programmes and works available on the national market, some of them presented according to algorithmic criteria. These characteristics make it all the more crucial to capture the audience's attention.

In this context, the audiovisual landscape is undergoing a profound reorganisation, marked in particular by consolidation strategies, with both private and public broadcasting companies seeking to adapt to the new realities of their environment.



THE REVOLUTION IN USES IS INTRINSICALLY LINKED TO DEVELOPMENTS IN THE AUDIOVISUAL AND DIGITAL ENVIRONMENT.

Audiences have been steadily eroding, particularly among younger audiences. The individual viewing time of the over-50s was five times higher in 2021 than that of the 4-14s, compared to three times higher in 2018. Radio is also experiencing a downward trend and an ageing audience. This is at least partly due to the increase in time spent on social networks, video sharing platforms and video on demand services, where the average age of users is 35. All these changes have been amplified in recent years by the Covid-19 crisis. However, despite these changes, the expectations placed on the audiovisual media – and particularly on public service companies – remain very high, with a particular responsibility on the part of such companies in terms of support for creation, diversity of supply, and access to information on the territory.

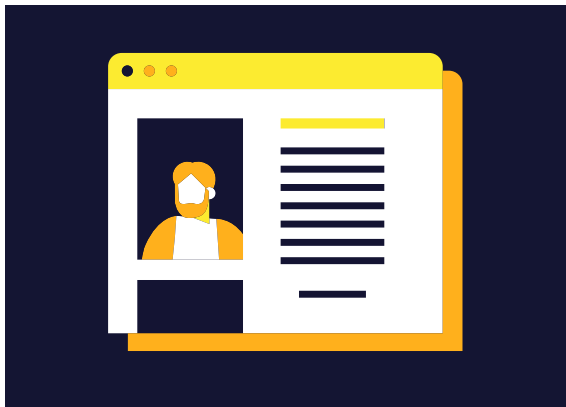
The rise of online technologies has led to the development of new ways of accessing content and communicating, but also new risks for our democracies.

Digital platforms, such as social networks, video sharing platforms, and search engines, have developed very rapidly.

"Expectations placed on the audiovisual media – and especially public service companies – remain very high"

THIS GROWTH IS PROFOUNDLY CHANGING THE WAY AUDIOVISUAL CONTENT IS USED.

For example, listening to radio on the internet now represents 15% of the overall audience and streaming is transforming the music industry. The rate of access to dematerialised cultural goods on the internet has increased considerably, reaching over 80% of internet users in France. At the same time, the digitisation of offers has encouraged the development of piracy of cultural and sports content



DIGITAL STAKEHOLDERS ARE ALSO CREATING NEW DYNAMICS IN THE PRODUCTION AND DISSEMINATION OF INFORMATION.

While there is a lot of information available online, it is also controlled by a limited number of intermediaries, such as search engines. At the same time, online platforms allow for an increase in the scope of public freedoms and, first and foremost, of freedom of expression, by providing additional spaces for speech and new channels for dissemination. They thus directly influence the mechanisms of public opinion formation and amplify long-identified phenomena, the most important of which is the manipulation of information. Other offences against the public interest also find a favourable breeding ground online: incitement to hatred, endangerment of minors, advocating terrorism, and fraud of all kinds.

Online platforms are nonetheless formidable tools for creating social links, accelerating societal change, and providing democratised access to culture and information, offering unprecedented opportunities for our societies.

To reap the collective benefits of digital transformation, regulation is now more necessary than ever.

The rapid change in the audiovisual and digital landscape requires the regulator to take these new dynamics into account, whether to preserve pluralism and media independence, to fight against the manipulation of information, or to support creation and the national cultural model. The number of stakeholders covered by the regulation has multiplied (audiovisual media, social networks, internet service providers, video-on-demand services, etc.) and the regulator's modes of action have been extended: in addition to controlling the obligations of audiovisual channels, the regulator now supervises digital stakeholders, relying more on the accountability of operators.

THE CHALLENGE IS TO DESIGN AND IMPLEMENT REGULATIONS ADAPTED TO THE NEW ECOSYSTEM, WHILE ENSURING THE REGULATOR'S PRIMARY MISSION: TO PRESERVE FREEDOM OF COMMUNICATION.

TO THIS END, TWO COMPLEMENTARY OBJECTIVES CAN BE PURSUED:

/ Fostering trust

On the one hand, the rapid emergence of online platforms and the important place they have acquired in our societies means that their activities must be made more transparent, and the public must be given the means to navigate safely online. In this new digital environment, the users are indeed stakeholders in their own right. Their rights and freedoms must be protected and their online actions taken into account: the users can create content, distribute it, report it, and restrict it. To protect it, the regulator must restrict access to it.

On the other hand, the regulator must also accompany the audiovisual media in the face of the rapid transformations of their environment, in order to contribute to reinforcing the links with their audiences; in this respect, the commitments of the channels in terms of pluralism of currents of thought and opinion, but also of on-screen representation of women, disabilities or societal diversity must respond not to a logic of display but to a reality: only audiovisual media that reflect today's society can arouse the confidence and support of the audiences.

The expectations of audiences are therefore changing and the sources of information are multiplying. Access to reliable, independent information is also essential, especially in the face of increasing regional and global crises, and interference by media controlled by foreign powers. In this context, the regulator must contribute to strengthening trust between the media, both audiovisual and digital, and citizens.

"The regulator must contribute to strengthening trust between the media, both audiovisual and digital, and citizens"

/ Acting at the relevant level

Faced with phenomena that are common to most countries and global stakeholders, but also with a need for proximity expressed by audiences, the regulator can no longer operate at just a domestic level. The legitimate, relevant scope of intervention also includes the local, European and even international levels. Cooperation with other regulators and with major global digital stakeholders thus offers many opportunities to enable our societies to reap the full benefits of digital transformation. The recent adoption of the Digital Services Act illustrates the importance of a European approach to promoting our continent's values and protecting citizens' rights and freedoms online.

KEY FIGURES

TO ILLUSTRATE THE TRANSFORMATION OF THE LANDSCAPE

Viewers

56 YEARS

was the average age of viewers in 2021. It was 48 in 2021, compared to an average age of 42 for the French population.

Subscription streaming

50%

of the recorded music sector's annual turnover was generated by subscription streaming in 2021, up from 7% in 2013.

Video consumption

+50%

of total video consumption by 15-24 year olds was on the internet ahead of television (29%) and video-on-demand services (19%), in 2020.

Video on demand

x2

is the increase in the number of daily users of subscription video-on-demand services between 2019 and 2020, reaching 8.7 million in 2021

Internet

32%

of French people use the internet as their primary source of information, a proportion that rises to over 66% for the under-35s

False information

NEARLY 50%

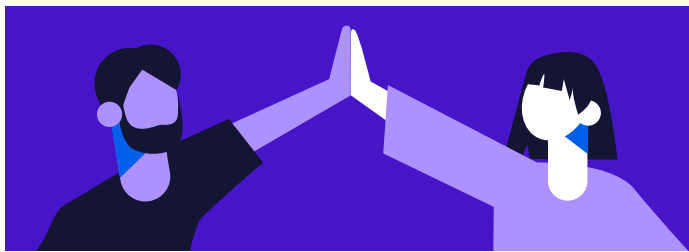
of French people believe that they are confronted with false information at least once a week

4 STRATEGIC OBJECTIVES

IN SERVICE OF A CAREFUL, DEMANDING REGULATION

OBJECTIVE 1

PROTECTING AUDIENCES AND WORKING TOWARDS A TRUSTED AUDIOVISUAL AND DIGITAL ENVIRONMENT



/ ACTION 1.

Strengthening our media and information literacy actions and raising awareness of legal, secure internet use, by increasing partnerships with the educational community and support for media-led initiatives

/ ACTION 2.

Mobilising audiovisual and digital stakeholders to advance the representation of women, diversity, and disability and to protect audiences from illegal or age-inappropriate content

/ ACTION 3.

Supporting the ecological transition by contributing to limiting the environmental impact of audiovisual and digital stakeholders

/ ACTION 4.

Strengthening Arcom's territorial network in favour of local regulation and local dynamics in the field of media and information literacy, copyright, and the proper use of screens

/ ACTION 5.

Ensuring reliable, independent information and pluralistic expression of thought and opinion in the national and local audiovisual media, as well as the transparency of online platforms

OUR TYPES OF MONITORING INDICATORS TO MEASURE THE ACHIEVEMENT OF THE OBJECTIVE

- Training courses and educational partnerships.
 - Measuring public perception, survey results, and reporting data.
 - Published resources.
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OBJECTIVE 2

FOSTERING THE COMPETITIVENESS AND PLURALISM OF FRENCH AUDIOVISUAL AND DIGITAL STAKEHOLDERS, AND PROMOTING CULTURAL DIVERSITY

/ ACTION 6.

Working towards a diversified, free, and quality audiovisual offer accessible throughout the country, in particular by supporting the deployment of digital terrestrial radio (DAB+) and the development of digital terrestrial television (DTT)

/ ACTION 7.

Adapting the legal framework and regulatory procedures to help strengthen the competitiveness of French audiovisual and creative stakeholders (concentration, broadcasting constraints, etc.)

/ ACTION 8.

To contribute to the reflections on the strategy, governance, and financing of public broadcasting, in order to defend its uniqueness, guarantee its independence, and ensure the quality and effectiveness of its action

/ ACTION 9.

Monitoring compliance with the obligations of audiovisual operators to finance creation, in particular by continuing to integrate French and foreign audiovisual media on demand services in order to develop a rich, diverse audiovisual and cinematographic offer

/ ACTION 10.

Protecting rights in the cultural and sports fields, and encouraging agreements between creative actors and content sharing platforms



OUR TYPES OF MONITORING INDICATORS TO MEASURE THE ACHIEVEMENT OF THE OBJECTIVE

- Audience and coverage measurements for the different modes of radio and television broadcasting.
- Studies and analyses carried out, dedicated publications.
- Voluntary agreements between rights holders and technical intermediaries.

OBJECTIVE 3

INSCRIBING OUR ACTION IN THE NEW EUROPEAN DYNAMIC AND AMPLIFYING ITS INTERNATIONAL ASPECT

/ ACTION 11.

Committing to the implementation of the Digital Services Act at the domestic and European levels, and promoting the European model of regulation of large online platforms internationally.

/ ACTION 12.

Continuing and strengthening Arcom's involvement in the European Regulators Group for Audiovisual Media Services (ERGA) and promoting the specificities of the French model in the development of the European regulatory framework for audiovisual and digital media.



/ ACTION 13.

Promoting the values and commitments of La Francophonie in the field of audiovisual and digital regulation, in particular during the presidency of the Francophone Network of Media Regulators (REFRAM) which will be held by Arcom until 2024.

/ ACTION 14.

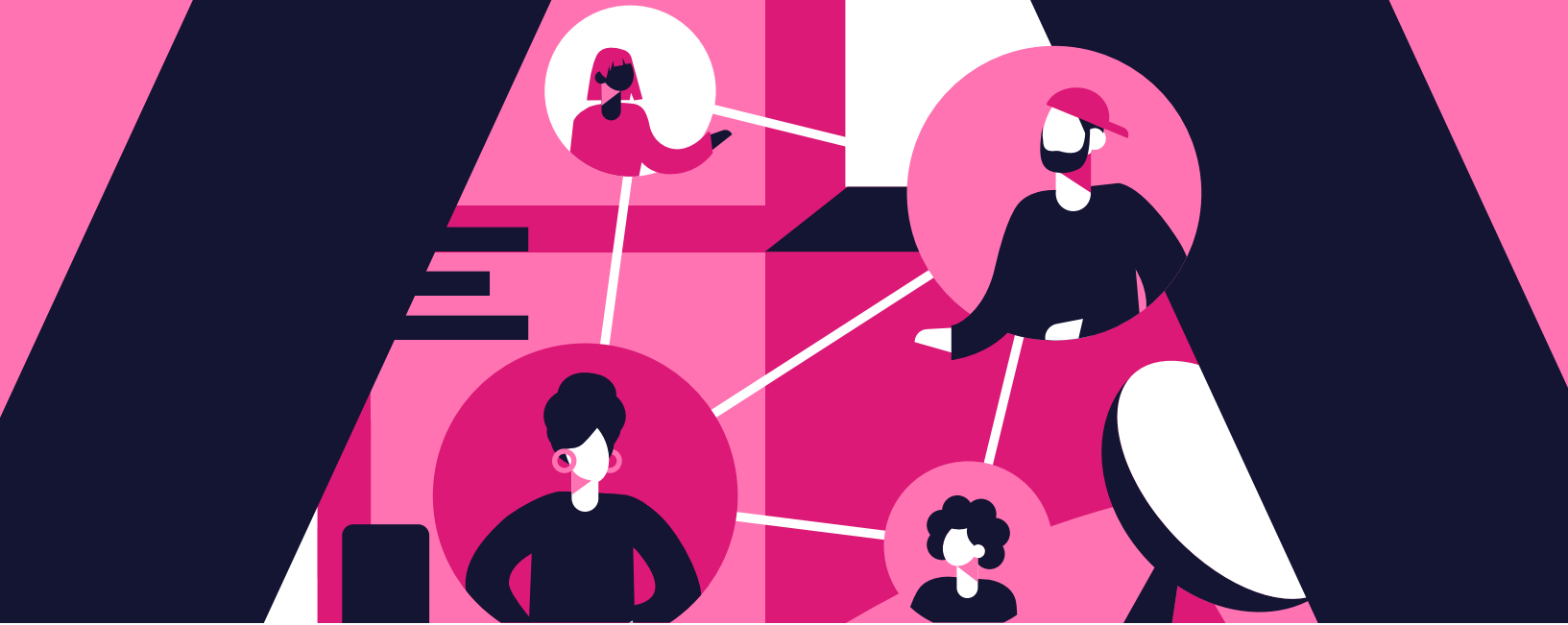
Contributing to new draft European legislation that falls within our scope.

/ ACTION 15.

Strengthening international cooperation with internet intermediaries, particularly in the fight against piracy of cultural and sports content

OUR TYPES OF MONITORING INDICATORS TO MEASURE THE ACHIEVEMENT OF THE OBJECTIVE

- Coordination or cooperation agreements concluded.
 - International meetings and events which Arcom has taken part in or organised.
 - Analyses and contributions produced on European and international issues.
 - Increase in English publications on the Arcom website.
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OBJECTIVE 4

ADAPTING OUR OPERATIONS TO CHANGES IN SOCIETY AND IN THE AUDIOVISUAL AND DIGITAL ENVIRONMENT

/ ACTION 16.

Consolidating our links with our institutional partners and networking with the national and international scientific community, our foreign counterparts, and civil society.

/ ACTION 17.

Strengthening the evaluation of Arcom's work, in order to report more accurately to Parliament and the public.

/ ACTION 18.

Reducing the time taken to process user alerts and developing new ways of interacting with the public.

/ ACTION 19.

Better proportioning our due diligence to the stakes of the cases to be investigated and making our procedures more fluid, in particular by accelerating their dematerialisation.

/ ACTION 20.

Strengthening the attractiveness of Arcom as an employer through active career management and the promotion of a fulfilling, respectful working environment that embodies the values of public service.

/ ACTION 21.

improving our environmental performance and setting ourselves a goal of energy and digital sobriety

OUR TYPES OF MONITORING INDICATORS TO MEASURE THE ACHIEVEMENT OF THE OBJECTIVE

- Academic meetings and events which Arcom has taken part in or organised.
 - Level of dematerialisation and automation of procedures and statistics for processing referrals.
 - Diversification and audience of communication and public interaction media.
 - Environmental studies and assessments.
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