

# COMMUNICATIONS REPORT

2025



**Rundfunk und Telekom Regulierungs-GmbH**

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# COMMUNICATIONS REPORT

2025

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## We stand for competition and media diversity

# Preface

### Dear reader,

the 2025 Communications Report once again succinctly summarises the activities undertaken by the four regulatory and supervisory bodies responsible for media, telecommunications and postal services: the Austrian Communications Authority (KommAustria), the Telekom-Control-Kommission (TKK) and the Post-Control-Kommission (PCK), as well as the Austrian Regulatory Authority for Broadcasting and Telecommunications (RTR).

More than simply meeting the reporting requirements set out in the KommAustria Act, the Telecommunications Act and the Postal Market Act, this report also informs readers about services provided beyond the scope of the regulatory mandate defined by law. In presenting this report, we are explicitly committed to open communication based on objectivity and quality standards. In this way, we ensure the highest level of transparency regarding our broad spectrum of responsibilities.

### What you can expect to find

The focus of the first section is RTR as an organisation. Besides providing operational support to KommAustria, the PCK and the TKK, RTR also has its own separate official duties to fulfil. Final tasks for realigning RTR's service department were completed in 2025. The aim here was to realise potential for assuming new responsibilities, and to provide the two regulatory authorities as well as RTR's own specialised divisions with optimum support. This meant recruiting additional HR staff, establishing a new In-House Law position, and implementing IT projects needed across the organisation. Other major items reported on in the first section are staff changes, as well as details of the annual accounts and the profit and loss statement. The regulatory authorities KommAustria, TKK and PCK are then briefly introduced.

Sections 2 and 3 describe the regulatory activities pursued by KommAustria in the 2025 reporting year as well as the authority's international commitments. Details covered include: notification and approvals procedures, platform regulation, media transparency, anti-terrorist activities and frequency management. In addition, we present the responsibilities KommAustria fulfils in its capacity as Digital Services Coordinator as defined in the DSA. The final sub-section outlines the decisions handed down by KommAustria on press and journalism subsidies, as well as rulings aimed at promoting quality journalism, and supporting self-regulation in commercial communication and in the protection of minors.

Section 3 additionally presents five special reports by KommAustria: the Youth Protection Report, the Report on Accessibility, the survey of broadcasting reach and market shares, the report on the progress of digitisation in broadcasting, and the report on self-regulation of commercial communication.

The fourth section covers the activities of the RTR Media Division. In its capacity as funding body for media companies, the Austrian Regulatory Authority for Broadcasting and Telecommunications (RTR) reports here on fund and grant management, providing insight into grant decisions and disbursement of the funds administered by the RTR Media Division. These funding sources include: the Fund for the Promotion of Commercial Private Broadcasting, the Fund for the Promotion of Non-Commercial Broadcasting, the Fund for the Promotion of Digital Transformation, the Digitisation Fund, the Austrian Television Fund, and the Fund for Promoting Audio Podcasting. The sub-report by the Complaints Board for Communications Platforms describes what types of complaint were submitted to the board and how related procedures were completed.

The fifth section is devoted to procedures conducted by telecommunications regulatory authority TKK, including the decisions handed down. Regulatory activities in the year under review focused on issues such as action to ensure competition in fixed and mobile communications markets, and the enforcement of net neutrality regulations, with the aim of ensuring free access to an open internet. With regard to spectrum issues, preparations for the 2.3 GHz and 2.6 GHz awards were completed, while coverage level requirements from previous frequency award procedures continued to be audited. The final sub-section describes the TKK's activities in its capacity as supervisory authority under the Signature and Trust Services Act (SVG).

The sixth section details the main activities of the Telecommunications and Postal Services Division at RTR in the reporting year, including its role as a regulatory authority also responsible for passing ordinances. Reporting in this context includes the extensive conciliation activities relating to user protection and phone number misuse, plus reviews of providers' general terms and conditions and the tariff provisions governing telecommunications products. Other information provided here relates to: the ordinances that RTR issued or evaluated, phone number administration and emergency communications, infrastructure rights in the context of deploying networks, and duties arising from the need to ensure secure communications network and services. The section also reports on international efforts under BEREC, the single information points for infrastructure data and construction projects, broadband coverage and approval activities.

As described in section 7, safeguarding competition in the market for postal services falls within the competence of the PCK and the Telecommunications and Postal Services Division at RTR. As in previous years, duties here included cases involving the closure or discontinuation of postal service points, procedures to ensure legal compliance of the contractual conditions governing universal service and of the tariffs charged, auditing the universal service provider's cost accounting system, as well as user protection. Another topic here is the activities at international level that RTR is also involved in.

Section 8 follows with a report on the work of the Service Desk for Artificial Intelligence (AI Service Desk). Established under law at RTR in early 2024, this department serves the general public as a pivotal point of contact and information centre for issues relating to artificial intelligence. Responsibilities include providing information material and guidance, answering enquiries, and arranging events devoted to the topic, as well as commissioning studies and analyses on AI deployment. The AI Service Desk similarly collects and compiles use-case examples along with best-practice recommendations.

"Information services for the general public" is the title of section 10, a report on topics such as how RTR serves as a competence centre for issues relating to the media and telecom sectors. In publishing numerous studies and publications and by organising conferences with experts, RTR seeks to disseminate legal, economic and technical expertise among interested stakeholders. The general public also benefits from ongoing information made available via the RTR website and social media as well as through press releases.

A survey and analysis of the markets under our regulatory mandate round out the 2025 Communications Report. Specifically, these are Austria's communications and advertising market, telecommunications market and postal market.

With this brief summary of the topics and issues falling under our work and responsibilities, we provide you with a first peek of what lies in store. We look forward to your feedback and comments.

**Michael Ogris**  
*Chairperson*  
*Kommunikationsbehörde Austria*  
*(KommAustria)*

**Barbara Nigl**  
*Chairperson*  
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**Wolfgang Struber**  
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*Rundfunk und Telekom Regulierungs-GmbH*  
*(RTR)*  
*Telecommunications and Postal Services Division*

Vienna,  
 June 2026



# RTR and the regulatory authorities

# 01 RTR and the regulatory authorities

## 1.1 Our company: we stand for competition and media diversity

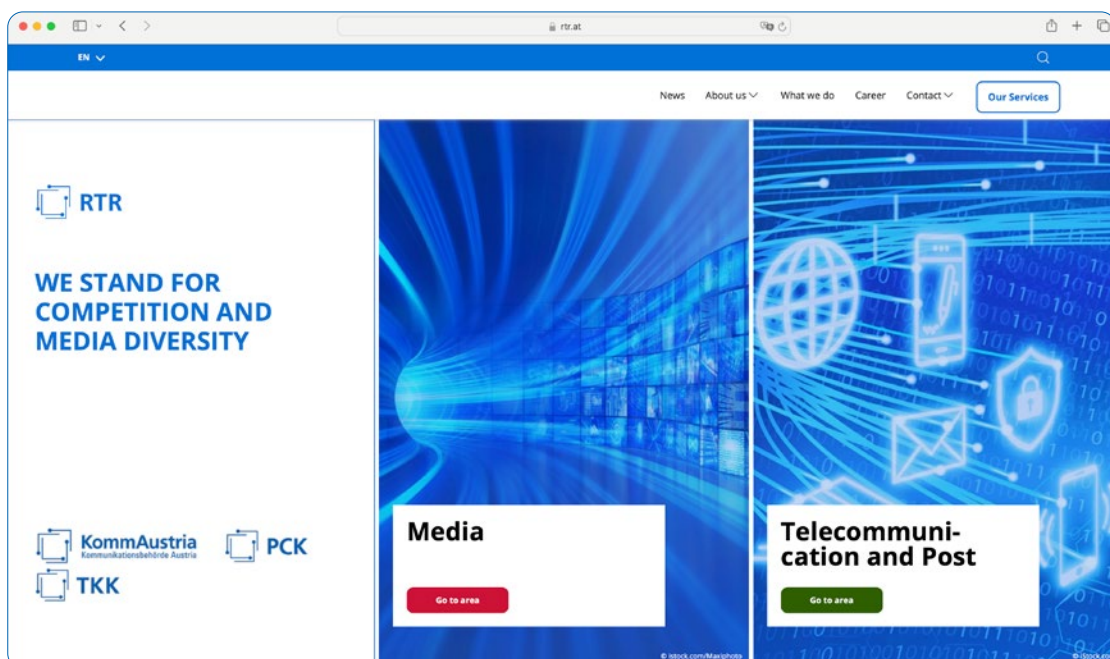
The Austrian Regulatory Authority for Broadcasting and Telecommunications (RTR) is wholly owned by the Republic of Austria. RTR's central responsibilities include promoting competition in the broadcasting, telecommunications and postal markets, while achieving the goals set out in the KommAustria Act and the Telecommunications Act. RTR is divided into two specialist divisions: the Media Division, and the Telecommunications and Postal Services Division, with a separate managing director responsible for each. RTR also serves as an administrative agency, providing support to the Austrian Communications Authority (KommAustria), the Telekom-Control-Kommission (TKK) and the Post-Control-Kommission (PCK). In addition, RTR administers funds to support projects in the broadcasting and media sectors. The two specialist divisions within RTR additionally offer alternative dispute resolution services, including via RTR's officially recognised conciliation bodies for consumers. A Service Desk for Artificial Intelligence has also been established within the RTR since 2024.

In the reporting year, Wolfgang Struber was the Managing Director of the Media Division, while Klaus Steinmaurer held the same position in the Telecommunications and Postal Services Division.

As a public corporation, RTR complies with the requirements of the 2017 Federal Public Corporate Governance Code, which takes into account the special responsibility and diligence duty owing upon public authorities. As owners of state property, authorities have a responsibility towards such property and thus towards the public. The RTR Corporate Governance Report is available (in German) on the RTR website at [www.rtr.at/de/rtr/Aufsichtsrat](http://www.rtr.at/de/rtr/Aufsichtsrat).

Further information on RTR can be viewed online at [www.rtr.at](http://www.rtr.at).

Figure 01: RTR website



## 1.1.1 RTR annual review

### RTR Service Department

The Service Department at RTR consists of all roles working to support the organisation and business structure for RTR's activities as a company. Activities were focused on realigning this department in 2024, and restructuring measures were implemented and transitioned to regular operations in the year under review.

Realignment was in response to the numerous additional tasks that the RTR has taken on and the increase in staff size in the Media and Telecommunications and Postal Services Divisions in recent years. The new organisational structure as well as a change in management resulted in sustainable conditions for adapting the service roles to respond to the increasingly complex and heavier demands faced by the organisation in the longer term. This included building a basis for a standardised approach to project management.

Key framework conditions for a modern working environment were more firmly established, including measures such as desk sharing, working from home and flexible working hours. After revision the previous year, the remuneration policy featuring transparent and competitive pay scales proved effective in the second year as well. Human Resources benefited from the changes, with its structures reinforced through increases in administrative and recruiting staff as well as by comprehensive digitisation measures. A new position, In-House Law, was also created. The role combines internal legal affairs—labour, tendering and contract law in particular—with central contract management, and ensures company management are provided with competent legal counsel.

With respect to information security, work continued on implementing the NIS2 Directive and, in the second half of the year, the RKE (Critical Entities Resilience) Act in order to fully comply with legislative requirements. Based on the recommendations made by the Court of Audit, comprehensive measures were taken in this context to gradually remedy any existing structural and resource-related deficits.

The new legislation adopted in 2024 also had significant repercussions for employees in the Finance team. Budget and financial planning were adapted and further developed on several occasions. Through additional tasks, the volume of documents to be processed continued to increase. The Finance team was responsible for handling the administration of organisational changes, integrating these changes into the banking processes within RTR's systems, and reviewing the procurement process. As part of digitisation measures, the new performance tracking system was implemented in Finance, besides ongoing projects aimed at optimising processes in the ERP system.

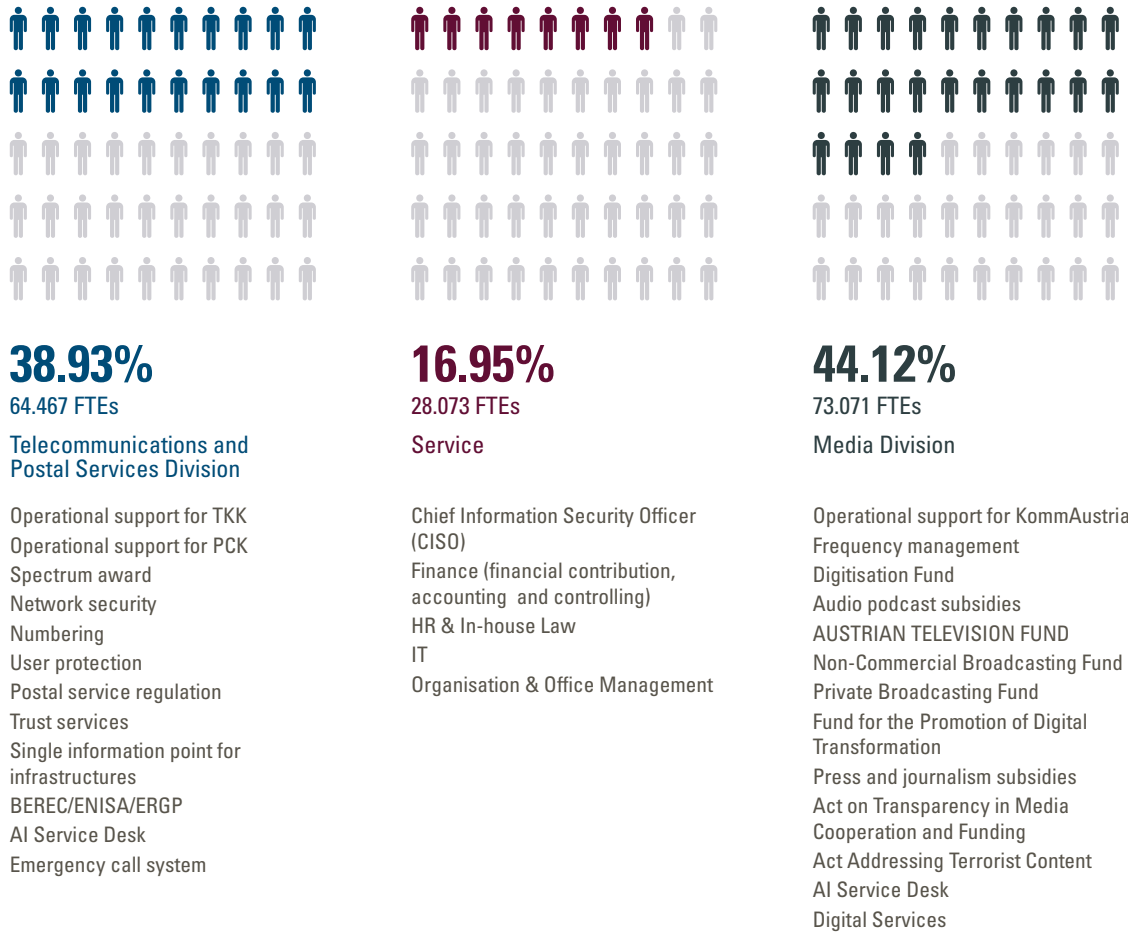
Following successful implementation of the federal service's ELAK procedure management system in 2024, Organisation & Office Management focused on increasing use of ELAK in the 2025 reporting year. The staff increases at RTR meant that changes to the office infrastructure were also needed. A new booking system for workplaces was introduced so that existing space could be used more efficiently. This reduced the need to rent additional office facilities despite the increase in staff size. The newly established Communication department drew up guidelines including a CD manual. Another product was a new tool for sending out newsletters and invitations to events, resulting from a review of the internal process for organising and handling in-house events.

In IT, the restructuring of the Service Department gave rise to the “IT Fit for the Future” project. This involved an analysis of the current IT landscape and an organisational and technical revision of the systems in use. A key project consisted of migrating the mail environment (mail, calendar, contacts and resources) from Notes/Domino to M365 Exchange Online. The project for implementing the Freedom of Information Act was supported by the IT department, with the ensuing deliverables integrated into the IT systems. The content and technical aspects of the central OpenData portal were revised during the year under review. Initial steps were also taken towards phasing out the legacy Notes/Domino environment.

### 1.1.2 RTR staff

Staff numbers at RTR continued to increase during the 2025 reporting year. The following table shows the staff breakdown by division and their corresponding activities.

**Figure 02: Service departments, media division, and telecommunications and postal services division, average FTEs in 2025**



In the 2025 reporting year (see table 1 below), the number of FTEs increased in all areas but especially in the Media Division and in the Service Department.

**Table 01: RTR staff size 2023-2025**

Average staff levels (FTEs)	2023	Percentage	2024	Percentage	2025	Percentage
Telecommunications and Postal Services Division	57.279	46.25%	62.651	42.27%	64.467	38.93%
Media Division	47.913	38.69%	62.502	42.17%	73.071	44.12%
Service	18.652	15.06%	23.068	15.56%	28.073	16.95%
<b>Total for RTR</b>	<b>123.844</b>	<b>100.00%</b>	<b>148.222</b>	<b>100.00%</b>	<b>165.611</b>	<b>100.00%</b>

In the Media Division, the increase in FTEs is due in particular to the expansion of resources for new tasks in Digital Services. This expansion had begun in the previous year and was continued in the 2025 reporting year. A small percentage of the increase in FTEs is due to activities in line with the Act Addressing Terrorist Content (as was the case from 2024 onwards) and also due to short-term duplicate employments caused by fluctuations in staff and leaves of absence. Restructuring measures resulted in an increase in FTEs in the Service Department in the 2025 reporting year.

A structured onboarding process, which was continued in the year under review, a comprehensive induction programme and a 'buddy' system involving support from fellow colleagues all helped to swiftly integrate new employees into their respective teams. New employees working side by side with experienced experts optimises communication and supports ongoing sharing of task-related expertise.

As a family-friendly employer, RTR is proactive in helping staff achieve a good work-life balance, which creates a company culture where employees feel valued and supported. With flexible working hours, options for working on a part-time basis and mobile working, RTR creates overall conditions that make it easier for employees to combine personal objectives with professional obligations and family commitments. Programmes such as parental leave with individual return-to-work options and flexible working arrangements are an important factor in promoting stable and long-term working relationships. During the reporting year, 35% of the workforce was employed on a part-time basis, with 10% employed part-time under parental leave arrangements.

By catering in this way to their personal situations, RTR creates a solid basis that motivates employees to stay focused on productive, high-quality work, which has a positive impact towards fulfilling the many tasks within RTR's remit.

Employee health and safety are also a vital concerns at RTR. This is why an occupational health promotion project, entitled "RTR Habitat: Working Well Together", was started at RTR in the reporting year. The project aims to combine all previous measures and programmes relating to occupational health and safety into one occupational health management system. The project will be accompanied until 2027 by a consultant who is provided by Austrian health insurance institution Österreichische Gesundheitskasse (ÖGK). Supplemented by an occupational psychologist, roles already working in related areas were tied into occupational health promotion: the occupational health specialist, the safety specialist, safety officers and fire safety officer. In September 2025, the physical and mental impacts of stress in the workplace were re-evaluated based on the Workers Protection Act (ASchG), with results integrated into occupational health promotion to take advantage of process synergies. The survey to evaluate physical and mental stress in the workplace pursuant to the ASchG was merged with the survey on health-related issues as part of occupational health promotion, and the combined work and health survey was carried out in September/October 2025. The results were published at the end of the year, setting the stage for steps to be taken in the following year.

Both personal and the professional dimensions of staff development play a key role at RTR. In the 2025 reporting year, 111 employees made use of a total of 309 working days for education and training, New employees are also kept in the loop by internal training sessions on relevant issues, regular internal meetings, briefings and other events, usually held in a hybrid format.

Seven summer interns took the opportunity to become acquainted with working at RTR during the 2025 reporting year.

### 1.1.3 Equality at RTR

RTR is committed to equal opportunity and equal treatment for all staff members, regardless of age, gender, ethnic or national origin, religion, any physical or mental challenges, and sexual orientation.

Founded upon this commitment, equality work at RTR is stipulated in a works agreement. The agreement requires an equality and family support policy, defining both personnel and organisational measures for promoting equality, to be drawn up every two years. The currently applicable equality policy from 2025 includes items such as: guidelines on gender-appropriate language, accessibility, the age structure of employees and age-appropriate working at RTR, income equality for all employees, and the promotion of career opportunities for women, as well as regulations on the reconciliation of work and family life, and education and training measures. These agendas are supported by the role of equal opportunities officer, which is newly staffed every three years.

During the year under review, work essentially focused on completing the 2025 equality and family support plan. Compared with the preceding equality policy, this provides for an increase in the share of female managers. It also evidences measures taken to achieve income equality for all employees through a new remuneration policy. From September 2025 onwards, particular attention was placed on reorganising gender equality activities at RTR. Closer links were forged with the Service Department, while an awareness team and code of conduct were also introduced. Furthermore, a new equal opportunities officer was hired. The equal opportunities breakfast event, previously established, was held this time on 10 March 2025 and devoted to the topic of non-violent communication.

### 1.1.4 RTR's financial statements for 2025

The external auditors at Confida Wirtschaftstreuhandges mbH have issued an unqualified audit certificate confirming RTR's financial statements for the 2025 business year (1 January to 31 December 2025). The financial statements presented below were prepared in accordance with the Austrian Commercial Code (UGB) as amended.

The profit and loss account and balance sheet, as shown in RTR's financial statements, are presented below.

RTR is funded by various sources, depending on the areas of activity in question. Market participants are required by law to assume a portion of the financing, while public funding is also tapped. The financial contribution is calculated using the planned revenues of each company in relation to total sector revenues. Once the actual revenues have been determined, the actual financial contributions are calculated and compared with the estimated financial contributions. To simplify administration, entities falling below a certain revenue limit, or threshold, are not required to pay financial contributions.

In 2025, RTR received federal funds amounting to EUR 4.820 million to finance media regulation; the share for financing the market was 27.87%, equivalent to EUR 1.863 million.

Public funds totalling EUR 5.660 million were awarded for the regulation of the telecoms market; market participants contributed EUR 3.787 million, which corresponds to 40.09%. For postal service regulation, EUR 0.287 million was allocated from the federal budget, with the remaining expenditure, amounting to EUR 0.784 million or 73.20% of the total, contributed by market participants.

Public financing covers the funds (Digitisation Fund, the AUSTRIAN TELEVISION FUND, the Private Broadcasting Fund, the Non-Commercial Broadcasting Fund, the Fund for the Promotion of Digital Transformation and the Fund for Promoting Audio Podcasting) and the supervisory body for trust services. This funding base also covers activities related to the network security advisory board, setting up a public warning system (AT-Alert), and the AI Service Desk.

More information is available at [www.rtr.at](http://www.rtr.at).

RTR closed the business year running from 1 January to 31 December 2025 with a balanced result.

**Table 02: Profit and loss account for the business year from 1 January to 31 December 2025**

	EUR	EUR	2024 EUR thousands	2024 EUR thousands
<b>1. Net income</b>		25,369.904.20		23,963
<b>2. Other operating income</b>				
a) Income from the disposal of fixed assets excluding financial assets	325.01			
b) Erträge aus der Auflösung von Rückstellungen	413,886.52		154	
c) Other	1,283,931.42	1,698.142.95	923	1,077
<b>3. Personnel expenses</b>				
a) Salaries	-13,633.341.03		-12,549	
b) Social expenses				
ba) Pension insurance expenses	-428,402.63		-364	
bb) everance pay expenses and contributions to staff provision funds	-215,808.16		-204	
bc) Statutory social insurance contributions as well as payroll-related fees and mandatory contributions	-3,327.647.17		-2,891	
bd) Other	-177,152.86	-17,782.351.85	-162	-16,171
<b>4. Amortisation and write-downs of intangible assets, depreciations and write-downs of tangible assets</b>				
a) Depreciation, amortisation and write-downs	-634,118.26		-738	
b) Release of investment grants	0.00	-634,118.26		-738
<b>5. Other operating expenses</b>				
a) Other	-7,613.007.85	-7,613.007.85	-6,449	-6,449
<b>6. Subtotal of items 1 to 5</b>		1,038.569.19		1,681
<b>7. Income from other securities held as long-term investments</b>		16,952.12		11
<b>8. Other interest and similar income</b>		123,269.22		154
<b>9. Expenses for financial assets</b>				
Write-downs	0.00	0.00		
<b>10. Interest and similar expenses</b>		0.00		
<b>11. Subtotal of items 7 to 10</b>		140,221.34		166
<b>12. Result before taxes</b>		1,178.790.53		1,847
<b>13. Taxes on income</b>		-30,657.64		-39
<b>14. Result after taxes/annual deficit</b>		1,148.132.89		1,808
<b>15. Release of profit reserves</b>				
Appropriation to free reserves		-1,233.189.85		-1,808
Release of free reserves		85,056.96		
<b>16. Net result</b>		0.00		0

### Sector-specific expenditure in RTR's specialist divisions

In the annual financial statements submitted by RTR, funding use is not reported by division. Table X3 correspondingly provides a breakdown of the main items listed in RTR's profit and loss accounts for the Telecommunications and Postal Services Division and the Media Division as well as the AI Service Desk (KI-Servicestelle), in accordance with Art. 19 Par. 3 no. 3 KOG.

**Table 03: RTR's income and expenses by division**

In EUR thousands	Telecommunications and Postal Services	Media	AI Service Desk	Total
Net income	11,072	13,598	700	25,370
Other operating income	819	879	0	1,698
Personnel expenses	-8,859	-8,690	-233	-17,782
Depreciation, amortisation and write-downs	-359	-268	-7	-634
Other operating expenses	-2,737	-4,629	-247	-7,613
Operating result	-65	890	213	1,039
Financial result	62	78	0	140
Result before taxes	-2	968	213	1,179
Taxes on income	-14	-17	0	-31
Result after taxes/annual surplus or deficit	-16	951	213	1,148
Appropriation to/release of profit reserves	16	-951	-213	-1,148
Net result	0	0	0	0

RTR's income and expenses for the individual areas of activity within each division are presented in the annex to the annual accounts as at 31 December 2025 as adopted by the general assembly. The individual areas within the Telecommunications and Postal Services Division are: telecoms regulation, supervisory body for trust services, and postal services regulation. The areas within the Media Division are: media regulation, Digital Services Coordinator, Act Addressing Terrorist Content, supervision of video-sharing platforms, Digitisation Fund, Austrian Television Fund, broadcasting funds and the Fund for the Promotion of Digital Transformation, and the Fund for Promoting Audio Podcasting (refer to [www.rtr.at](http://www.rtr.at)).

**Table 04: Balance sheet as at 31 December 2025 – assets**

	31.12.2025		31.12.2024	
	EUR	EUR	EUR thousands	EUR thousands
<b>A) Fixed assets</b>				
I. Intangible assets				
1. Industrial property and similar rights	531,365.84		667	
2. Prepayments	23,794.00	555,159.84	53	720
II. Tangible assets				
1. Buildings on third-party land	28,189.90		42	
2. Other assets, operating and office equipment	356,606.18		442	
3. Equipment under construction	23,888.25	408,684.33	0	484
III. Financial assets				
Long-term securities		2,754,211.26		1,854
		3,718,055.43		3,058
<b>B) Current assets</b>				
I. Receivables and other assets				
1. Trade receivables (With a maturity >1 year EUR 0; previous year: EUR 0)	815,374.46		484	
2. Other receivables and assets (With a maturity >1 year EUR 0.00; previous year: EUR 37.5 thousand)	858,292.48	1,673,666.94	566	1,050
II. Cash at bank and in hand		8,068,663.08		6,762
		9,742,330.02		7,812
<b>C) Prepaid expenses</b>		342,308.51		279
<b>D) Trustee accounts – funds</b>		42,119,642.15		39,155
		55,922,336.11		50,304

Table 05: Balance sheet as at 31 December 2025 – liabilities

	31.12.2025		31.12.2024	
	EUR	EUR	EUR thousands	EUR thousands
<b>A) Equity capital</b>				
I. Called-up and paid-in nominal capital	3,633,641.71		3,634	
II. Capital reserves				
Committed	1,924.59		2	
III. Profit reserves				
Other reserves / free reserves	3,002,513.32		1,854	
IV. Net result	0.00		0	
Profit carried forward (previous year: EUR 0)	0.00	6,638,079.62	0	5,490
<b>B) Special item: investment grant</b>		89,410.92		
<b>C) Provisions</b>				
1. Provisions for severance pay	136,810.00		126	
2. Other provisions	905,485.00	1,042,295.00	1,237	1,363
<b>C) Liabilities</b>				
1. Trade payables	1,230,458.08		1,065	
(With a maturity <1 year EUR 1,230,458.08; previous year: EUR 1,065 thousand; with a maturity >1 year EUR 0; previous year: EUR 0)				
2. Other liabilities	4,582,238.74	5,812,696.82	2,688	3,753
(With a maturity <1 year EUR 4,582,238.74; previous year: EUR 2,689 thousand; with a maturity >1 year EUR 0; previous year: EUR 0; due to taxes EUR 421,053.67; previous year: EUR 225 thousand; due to social security obligations EUR 354,795.483; previous year: EUR 316 thousand)				
<b>D) Trustee obligations – funds</b>		42,339,853.75		39,698
		55,922,336.11		50,304

## 1.2 National regulatory authorities KommAustria, TKK and PCK

A key mandate at RTR is to serve as the administrative agency for the national regulatory authorities KommAustria, TKK and PCK, introduced briefly below.

### **Austrian Communications Authority (KommAustria)**

The Austrian Communications Authority (KommAustria) is Austria's independent and autonomous regulatory and supervisory authority with responsibility for electronic audio and audiovisual media. This mandate also encompasses supervision of the Austrian Broadcasting Corporation (ORF) and its subsidiaries. The authority safeguards diversity of media and opinion as well as fair competition on the dual broadcasting market, which includes private providers and the public service broadcaster. It also has the mandate to roll out and expand digital broadcasting.

KommAustria is the oversight authority for providers of intermediary services, platforms and video-sharing platforms. As the national Digital Services Coordinator, the authority is also tasked with implementing the EU's Digital Services Act (DSA) in Austria.

The authority also grants funding to print media and fulfils mandates under the Act on Transparency in Media Cooperation and Funding (MedKF-TG) and the Exclusive Television Rights Act (FERG). The organisation, duties and objectives of KommAustria are set forth in the [KommAustria Act \(KOG\)](#).

KommAustria is a panel authority made of up seven members. Michael Ogris serves as chair and Susanne Lackner as deputy chair.

Detailed information about KommAustria, such as Rules of Procedure, allocation of responsibilities and decisions, is available at [www.rtr.at/medien/wer\\_wir\\_sind/KommAustria/KommAustria.de.html](http://www.rtr.at/medien/wer_wir_sind/KommAustria/KommAustria.de.html) (in German).

### **Telekom-Control-Kommission (TKK)**

The Telekom-Control-Kommission (TKK) has been responsible for regulating the Austrian telecommunications market since 1997. Tasks and responsibilities of this independent panel authority are laid down in detail in the 2021 Telecommunications Act (TKG 2021). Among other things, it is responsible for regulation of competition, frequency assignment procedures and network cooperation, as well as monitoring net neutrality. Pursuant to the [Signature and Trust Services Act \(SVG\)](#), the TKK also serves as the supervisory body for trust services.

The TKK consists of three main members and three substitute members who are appointed by the federal government for a five-year term. Barbara Nigl, Justice of the Supreme Court, serves as chair.

Details on the TKK are available (in German) at [www.rtr.at/TKP/wer\\_wir\\_sind/tkk/TKK.de.html](http://www.rtr.at/TKP/wer_wir_sind/tkk/TKK.de.html).

### **Post-Control-Kommission (PCK)**

The Post-Control-Kommission (PCK) has been responsible for regulating the Austrian postal market since 2008. Its tasks and responsibilities as an independent regulatory institution are laid down in detail in the Postal Market Act. Among other things it is responsible for measures relating to the universal service provider, licences, approvals of specified sets of general terms of business, and for reviewing the fees charged by postal service providers.

The PCK consists of three main members and three substitute members who are appointed by the federal government for a five-year term. Barbara Nigl, Justice of the Supreme Court, serves as chair.

Details on the Post-Control-Kommission are published at [www.rtr.at/TKP/wer\\_wir\\_sind/pck/startseite.de.html](http://www.rtr.at/TKP/wer_wir_sind/pck/startseite.de.html) (in German).



# Activities of KommAustria

# 02 Activities of KommAustria

## 2.1 Access to media markets

KommAustria regulates access to media markets, specifically through assignment of broadcasting frequencies, issuing of broadcasting licences, acceptance and review of notifications from cable broadcasters and other providers of audiovisual media services, as well as review of new services prior to launch by the ORF or its subsidiaries. Other responsibilities include the issuing of multiplex licences to radio and television broadcasters.

### 2.1.1 Approvals and notifications relating to multiplexes

#### 2.1.1.1 Nationwide digital radio

During the reporting period, two changes to telecommunications licences were approved and no assignment of transmission capacities was made concerning the nationwide MUX I multiplex platform. At the end of 2025, the overall station line-up comprised 16 stations and two ancillary services. With 15 broadcasting systems in operation, the nationwide multiplex platform MUX I enabled DAB+ to achieve a technical coverage rate of 84% of the Austrian population in 2025.

In relation to the nationwide MUX III multiplex platform, no changes were made to station line-ups, nor were any transmission capacities assigned. The station line-up comprised 14 stations and two ancillary services at the end of the reporting period. With the systems currently in operation, coverage levels of 84% for mobile reception and 63% for portable indoor reception (in terms of primary place of residence) can be achieved.

#### 2.1.1.2 Regional and local digital radio

Six licences to operate regional multiplex platforms were valid at the end of the period under review, specifically those for: 'MUX II – Wien', 'MUX II – Vorarlberg', 'MUX II – Tyrol', 'MUX II – Salzburg und Oberösterreich', 'MUX II – Steiermark, Kärnten und Südburgenland', and 'MUX II – Niederösterreich und Nordburgenland'.

The 'MUX II – Wien' multiplex platform covers the Vienna region. After three station line-up changes, the station line-up for this multiplex platform comprised 13 stations and two ancillary services at the end of 2025.

The 'MUX II – Vorarlberg' multiplex platform covers the Vorarlberg region. After two station line-up changes, the station line-up for this multiplex platform comprised five stations and two ancillary services at the end of the reporting period.

The 'MUX II – Tirol' multiplex platform covers the Tyrol region. After two changes in the reporting period, the station line-up for this multiplex platform comprised four stations and two ancillary services.

The 'MUX II – Salzburg und Oberösterreich' multiplex platform covers the Salzburg and Upper Austria region. After two changes in the reporting period, the station line-up for this multiplex platform comprised five stations and two ancillary services.

The 'MUX II – Kärnten, Steiermark und Südburgenland' multiplex platform covers the Carinthia, Styria and southern Burgenland region. After three changes in the reporting period, the station line-up for this multiplex platform comprised five stations and no ancillary services.

The 'MUX II – Niederösterreich und Nordburgenland' multiplex platform covers the provinces of Lower Austria and Burgenland. After three changes in the reporting period, the station line-up for this multiplex platform comprised seven stations and two ancillary services.

In the period under review, no new licences were issued for operating regional multiplex platforms for digital terrestrial radio.

### **2.1.1.3 Nationwide television**

Licences for operating the MUX A and MUX B multiplex platforms were again put out to tender in the reporting year.

In the period under review, a station line-up change was approved only in relation to the nationwide multiplex platform MUX F (Radio Maria).

No permits under telecommunications law were applied for during the observation period in the reporting year.

### **2.1.1.4 Regional and local television**

At the end of the reporting period, 14 MUX C platforms were in operation, providing coverage to a total of 6,191,332 people. No licences to operate regional and local multiplex platforms were surrendered during the period under review.

A total of five station line-up changes were approved in this context (TV Berlin, K-TV, Hope-TV, Kurier TV and oe24.TV).

One application for the issue of a station broadcast licence for the multiplex platform 'MUX C – Bad Ischl, Wolfgangsee und Bad Goisern' was also submitted during the reporting period.

### **2.1.1.5 Television pilot projects**

In the context of 5G broadcasting trials in Vienna, two existing licences were extended or reissued during 2025.

Beyond that, two applications to extend the licence for trial use of the terrestrial multiplex platform '5G broadcast test operation Vienna' were also approved.

## 2.1.2 Approvals and notifications relating to radio

During the period under review, KommAustria conducted licensing procedures, on the one hand in response to applications for creating new coverage areas or expanding existing ones, as well as part of official tender procedures to re-award licences due to expire.

In addition, numerous licences were issued for radio event broadcasting and educational broadcasting, and for broadcasting radio service via multiplex platforms.

### 2.1.2.1 Nationwide radio broadcasting (analogue)

KRONEHIT Radio BetriebsgmbH has held a second nationwide private terrestrial broadcasting licence, limited to ten years, since December 2024. The network broadcasts kronehit, an adult contemporary radio format. During the reporting period, this licence was assigned a second frequency and eight tunnel radio systems, and received approval for 57 telecommunications licence changes. KRONEHIT Radio BetriebsgmbH had consequently been assigned a total of 163 frequencies as of the end of this reporting period, with which it provides coverage to around 93% of the Austrian population.

A second nationwide licence had originally been awarded in early 2019, to Antenne „Österreich“ und Medieninnovationen GmbH (current licensee: TNR GmbH). Under this licence, the Radio Austria network (now oe24) has been on air since November 2019. With its current total of 62 assigned frequencies, this broadcaster can provide coverage to around 73% of the Austrian population. During 2025, one change to a telecommunications licence was approved and eight transmission systems, along with frequency assignments, were surrendered.

In 2025, a third nationwide licence was issued to Radio Eins Privatrado Gesellschaft m.b.H., which has been used to broadcast the 88.6 station since the end of August 2025. After this licence was issued in the reporting year, it was consolidated with a second, existing licence. The resulting licence has a total of 46 assigned frequencies, which can be used to provide coverage to more than 67% of the Austrian population. The licensee applied for the consolidation of two other licences in the reporting year; these procedures are still pending.

### 2.1.2.2 Regional and local radio broadcasting (analogue)

In the local and regional terrestrial broadcasting sector, a total of six licensing procedures were carried out in 2025.

The following five licences were issued:

**Table 06: Licenses issued in 2025, by licence holder and licence area**

Licence holder	Coverage area	Licence assignment final
WELLE SALZBURG GmbH	Innsbruck und Teile des Bezirks Innsbruck-Land	Yes
Radio Maria Österreich	Wien Innere Stadt 99.5 MHz	Yes
Antenne Steiermark Regionalradio GmbH & Co KG	Styria	Yes
Antenne Salzburg GmbH	Wien 100.3 MHz	Yes
FHW Education & Management GmbH	Wien 105.1 MHz	No

A single licensing procedure was still pending at the end of the reporting period.

In a number of other instances, parties requested frequencies to expand existing coverage areas or improve

coverage in existing areas. In response to these procedures, a total of seven decisions were issued to assign the following frequencies:

- Frequency 'WIEN NORD (Praunstraße) 90.5 MHz' to Radio Eins Privatrado Gesellschaft m.b.H.
- Frequency 'DEUTSCHLANDSBERG 2 (Burg Landsberg) 107.0 MHz' to Radio Grün Weiß GmbH
- Frequencies 'KOEFLACH 3 (Gößnitz)' and 'VOITSBERG 2 (Arnstein)' to Radio VM1 GmbH
- Frequency 'NEUNKIRCHEN 2 (Am Spitz) 107.5 MHz' to N & C Privatrado Betriebs GmbH
- Frequencies 'S POELTEN 6 (EVN Mast) 103.1 MHz' and 'KLOSTERNEUBURG (FREIBERG BOS Mast) 96.0 MHz' to Stadradio Regional Hörfunk GmbH
- Frequencies 'IMST 3 (Osterstein Arzl) 97.8 MHz', 'LAENGENFELD 2 (Burgstein) 107.5 MHz' and 'LANDECK 3 (Krahberg) 104.3 MHz' to Radio VM1 GmbH
- Frequencies 'BRAMBERG (Wildkogel) 90.2 MHz' and 'S MICHAEL LUNG 2 (Aineck) 102.5 MHz' to Antenne Salzburg GmbH.

A total of ten procedures for expanding coverage areas or to improve coverage in existing coverage areas were still pending at the end of the reporting period.

### 2.1.2.3 Nationwide radio broadcasting (digital)

One licensing procedure was conducted in relation to nationwide digital radio licences but had not been concluded by the end of the period under review.

### 2.1.2.4 Regional and local radio broadcasting (digital)

During the reporting year, the following seven regional digital radio licences were issued and one distribution mode change was approved:

**Table 07: Regional DAB+ licensing**

Licence holder	Multiplex platform
MediaMarkt Radio GmbH	MUX II – Vorarlberg
MediaMarkt Radio GmbH	MUX II – Tirol
MediaMarkt Radio GmbH	MUX II – Salzburg und Oberösterreich
MediaMarkt Radio GmbH	MUX II – Kärnten, Steiermark und Südburgenland
MediaMarkt Radio GmbH	MUX II – Niederösterreich und Nordburgenland
CM Classified Media GmbH	MUX II – Niederösterreich und Nordburgenland
Antenne Österreich Digital GmbH	MUX II – Niederösterreich und Nordburgenland
Antenne Österreich Digital GmbH	From MUX II – Niederösterreich und Nordburgenland to MUX II – Wien

### 2.1.2.5 Event radio and educational radio licences

An event radio broadcasting licence is granted for a maximum of three months, authorising broadcasting in the vicinity of and simultaneously with an independent public event. In 2025, one event radio licence was issued. Another event radio licensing procedure was still pending at the end of the reporting period.

Educational radio licences are granted to education or training institutions, authorising them to locally broadcast radio formats in a functional context with the duties of the particular institution. Such licences can be granted for a maximum of one year. Six educational radio licences were granted in 2025. Another procedure was still pending at the end of the reporting period.

### 2.1.2.6 Procedures under telecommunications law

To simplify administration, the Telecommunications Act 2021 (TKG 2021) empowers KommAustria as a kind of 'one-stop shop', additionally authorising it to issue permits under telecommunications law that are required for the radio equipment used in broadcasting. Permits under telecommunications law are issued either together with a licence under broadcasting law or in response to an application under telecommunications law. These latter cases usually involve technical changes planned for radio systems, such as the use of new transmitter antennas, the relocation of transmission sites or increased transmission power.

In 2025, KommAustria approved five changes to radio systems, one application to increase power output and four applications allowing private radio broadcasters to conduct test transmissions.

During the reporting period, one application from KRONEHIT Radio BetriebsgmbH. for a licence to set up and operate a total of eight tunnel radio systems was approved.

One radio system licence was surrendered.

KommAustria also received 17 requests for permission to operate radio equipment within broadcasting frequency bands but for non-broadcasting purposes (to cover drive-in cinemas, conferences and similar events), with these granted where frequencies were available.

### 2.1.2.7 Licences for satellite radio

KommAustria issued no licences for satellite radio in 2025.

### 2.1.2.8 Radio stations subject to notification requirements

During the 2025 reporting period, KommAustria was notified of one new cable radio station and the discontinuation of 13 cable radio stations.

## 2.1.3 Approvals and notifications relating to audiovisual media services

### 2.1.3.1 Television channel licensing

Television channels subject to licensing approval are broadcast via satellite and/or via terrestrial multiplex platforms.

In 2025, KommAustria issued licences for two television channels.

**Table 08: Television licensing**

Licence holder	Channel	Means of transmission
R9 Regional TV Austria GmbH	R9 Österreich	Satellite
SAT.1 Privatrundfunk und Programmgesellschaft m.b.H	SAT.1 Österreich	Satellite, MUX B

Two licences issued in 2024 for broadcasting and distributing television channels transmitted via satellite were surrendered.

### 2.1.3.2 Media services subject to notification requirements

The following notifications were received by KommAustria in the 2025 reporting period: 85 notifications of on-demand audiovisual media services, six notifications of television channels broadcast over the internet, and three notifications of cable television channels. In addition, six applications for assessment in accordance with Art. 9 Par. 8 of the Audiovisual Media Services Act (AMD-G) were received.

## 2.1.4 Approvals and notifications of new ORF services

### 2.1.4.1 Radio broadcasting spectrum assigned to the ORF

As part of its responsibility for assigning radio transmission capacity and for issuing corresponding permits under telecommunications law, KommAustria also plays a role in cases where the ORF uses radio transmission systems.

During the reporting period, five procedures were conducted for the assignment or extension of multiple tunnel radio systems.

### 2.1.4.2 Changes to service plans and prior evaluation procedures

Im Berichtszeitraum wurden drei geänderte Angebotskonzepte und ein Vorschlag für ein neues Angebot gemäß § 6a Abs. 3 ORF-G übermittelt.

## 2.1.5 Notification of video sharing platforms

During the reporting period, three video-sharing platforms were notified, with one notification being withdrawn. Four video-sharing platforms were therefore notified overall.

## 2.2 Legal supervision

### 2.2.1 General supervision

In relation to legal supervision, a large number of notifications of data updates pursuant to the Audiovisual Media Services Act (AMD-G) and the Private Radio Act (PrR-G) were received. Notifications of service discontinuation and licence relinquishment were recorded in the directories, while infringement and administrative penal procedures were also conducted in response to failures to comply with the duty to update data, or the incompleteness or lateness of such updates. Several changes to stations were also notified and consequently approved.

In the context of material changes to service provider ownership rights, ownership changes were approved, and infringement and administrative penal procedures were conducted in response to breaches of the approval requirement.

Other procedures were conducted, relating to suspected unauthorised broadcasts, to prohibiting media services, to the revocation of licences and/or specific frequencies, as well as in response to the failure to submit the requested recordings of the transmissions, or the incompleteness of such submissions.

Another procedure is still pending because of a competitor complaint concerning a channel operated by a private radio broadcaster.

### 2.2.2 Commercial communications

Evaluations of 64 audiovisual media services and radio stations were carried out in 2025 as part of monthly advertising monitoring duties. The focus here was on DAB+ radio stations. Three procedures were also conducted on the authority's initiative.

ORF radio stations were evaluated as follows in 2025: the regional stations Radio Wien, Radio Burgenland, Radio Salzburg, Radio Niederösterreich, Radio Kärnten and Radio Oberösterreich were evaluated once each. Among the ORF's nationwide stations, Ö1 and FM4 were evaluated once each and Ö3 was evaluated twice. On the basis of the evaluations, procedures were initiated in five cases.

Among the ORF's national television channels, ORF 1 was evaluated five times, ORF 2 and ORF III were evaluated twice each, and ORF Sport+ was evaluated once. As a result of these evaluations, procedures were initiated in four cases and one was completed with final effect.

Of the ORF's online platforms, ORF ON and ORF Kids were each evaluated.

In the private radio segment, stations run by 20 broadcasters were evaluated. In eleven cases, procedures were initiated due to infringements of advertising regulations, with these procedures yet to be completed with final effect.

In the private television segment, thirteen channels were evaluated. Procedures were initiated in nine cases due to infringements of advertising regulations, one of which was completed with final effect.

Broadcasts were evaluated from nine services offered by providers of on-demand audiovisual media services. One procedure was initiated due to infringement of advertising regulations and completed with final effect.

## 2.2.3 Programming principles

In their television and radio programmes, broadcasters are required to uphold the principles of objectivity and diversity of opinions.

For the ORF, the corresponding principles are codified in Art. 4 Par. 5, and Art. 10 Par. 5 and 7 ORF-G. Here it is specified that information must be comprehensive, independent, impartial and objective, and aimed at enabling democratic discourse by helping the public freely form opinions.

Based on its public service remit, the ORF is also obliged to reflect the diversity of opinions represented in public life and to respect human dignity, personality rights and individual privacy rights. Commentaries, analyses and presentations must be objective and based on verifiable facts.

A total of 24 procedures involving complaints of alleged breaches of programming principles by the ORF were initiated in the period under review. The cases mostly involved alleged breaches of the principles of objectivity and impartiality in ORF reporting.

In seven pending procedures, the complaint had to be dismissed as a result of a failure to comply with the instruction to correct errors. In five other procedures, the complaint had to be dismissed as inadmissible or clearly unjustified; in another four procedures, the complaint was dismissed as inadmissible due to insufficient grounds for complaint. In one procedure, part of the complaint was dismissed as inadmissible, with the rest of the complaint being rejected as unjustified. In five complaints procedures, the complaint was rejected as unjustified, with appeals filed against this decision in four procedures. In another procedure, the part of the complaint concerning a breach of programming principles was upheld, with the rest of the complaint being rejected as unjustified. An appeal was filed against the decision from KommAustria in this procedure. In two procedures, the Federal Administrative Court (BVwG) upheld appeals against KommAustria's decision to dismiss the complaint. These cases were the subject of ex officio constitutional review proceedings before the Constitutional Court (VfGH), pursuant to Art. 140 Par. 1 Point b of the Federal Constitutional Act (B-VG). Ten complaints procedures that had been initiated could not be completed in the reporting year. Three statements of facts received offered no grounds for ex officio action to be taken on the part of KommAustria. One procedure concerning a statement of facts received could not be completed in the reporting year.

In the context of the legal supervision of private broadcasters, the complaint had to be dismissed in three procedures as a result of a failure to comply with the instruction to correct errors; in another procedure, the complaint had to be dismissed as inadmissible. Six statements of facts received offered no grounds for ex officio action to be taken on the part of KommAustria.

Three ex officio reviews offered no grounds for initiating a procedure. Infringements were identified in two procedures initiated ex officio, with both subject to ongoing appeal proceedings. One procedure could not be completed in the reporting year.

## 2.2.4 Conciliation procedures in media

The RTR Media Division is competent under KommAustria as the conciliation body for complaints relating to communications networks and services used in broadcasting. The main prerequisite for the initiation of a conciliation procedure is that the customer and operator have unsuccessfully attempted to reach an agreement on their own. In the course of a conciliation procedure, RTR attempts to negotiate a mutually agreeable solution or informs the participants of its position on the case in question. The conciliation body received 83 complaints in the period under review. Details about conciliation cases are available in the conciliation report published each year (see the 2025 annual report by the conciliation bodies at [www.rtr.at/schlichtungsbericht-2025](http://www.rtr.at/schlichtungsbericht-2025); in German).

## 2.2.5 Purpose of business, public mandate and bodies

During the 2025 reporting period, KommAustria reviewed three changes to service plans and found no reason to raise any objections. One prior evaluation procedure has not yet been completed.

During the reporting year, KommAustria conducted ten procedures addressing objections raised as a result of failing to be included in the eligible voters list in the 2025 editors' spokesperson elections. In five cases, KommAustria ordered the objector's inclusion on the eligible employees list. In one of these five cases, an appeal against the authority's decision was brought before the BVwG.

The procedure to verify the ORF's quality assurance system was initiated pursuant to Art. 4a of ORF-G.

The ORF annual report and 2024 ORF transparency report were also submitted pursuant to Art 7 and 7a ORF-G.

The authority was also notified of the termination of a foreign broadcasting service pursuant to Art. 3 Par. 6 of the ORF Act.

Ultimately, four complaints were lodged against the ORF in this context during the reporting year. One of these complaints concerned the alleged infringement of the coverage mandate pursuant to Art. 3 ORF-G. One complaint was raised against an appointment to the ORF Audience Council. Another complaint was raised concerning infringements of Art 20 Par. 1 No. 4 and Art. 20 Par. 6 ORF-G, and another concerning an infringement of Art. 28 Par. 2 No. 4, Art. 19 Par. 2 and Art. 20 Par. 1a ORF-G. Three procedures have not yet been completed.

## 2.2.6 Supervision of business activities

The audit commission is tasked with auditing the ORF's annual accounts, management report and consolidated financial statements. The commission is also responsible for verifying that the ORF is managed according to the principles of economy, efficiency and expediency, and that its accounting and business practices comply with the law—particularly Art. 8a, Art. 31c and Art. 39 to 39b ORF-G. KommAustria may also assign the audit commission specific audit tasks at any time, even outside the scope of its annual audit work.

The audit commission must consist of at least two external auditors or external auditing firms, and these members of the commission are appointed by KommAustria to serve a term of five business years. In the reporting year, KommAustria completed the award procedure that it had started in 2024 pursuant to the Federal Procurement Act (Bundesvergabegesetz) for appointing a new audit commission. A bidding consortium, consisting of KPMG Austria GmbH Wirtschaftsprüfungs- und Steuerberatungsgesellschaft and BDO Assurance GmbH Wirtschaftsprüfungs- und Steuerberatungsgesellschaft, was appointed as the new audit commission.

As part of supervising the ORF's business activities, KommAustria audited the consolidated financial statements and the individual financial statements as at 31 December 2024 during the reporting year. Following the audit, the KommAustria audit commission issued, based on the service agreement, audit reports with unqualified audit certificates.

A key part of the supervision of ORF business activities involves a business audit to ascertain whether ORF management is complying with the principles of economy, efficiency and expediency. In the year under review, the business audit for the 2024 business year was materially concluded with the issuing of an audit report by the audit commission covering a total of eight audit areas.

During the reporting period, KommAustria initiated three procedures pursuant to Art. 38b ORF-G to confiscate revenues from the economic advantage the ORF had gained by breaching advertising provisions, and one confiscation procedure pursuant to Art. 38a ORF-G for exceeding the limits of the ORF's public service remit. The procedures have not yet been completed.

## 2.2.7 Market research

As part of the survey of reach and market shares carried out in 2025 for the 2024 calendar year, the RTR Media Division performed on behalf of KommAustria an initial survey of 447 providers using a special eRTR application. KommAustria subsequently requested 41 media services providers to provide information about reach (market shares), level of coverage and user or viewer figures, details required in order to compile the market report. After failing to provide this information, two media services providers were issued decisions demanding compliance with the request for information. One enforcement procedure is still pending.

## 2.2.8 Promotion of accessibility

Media services providers are under obligation to take active steps to make their content accessible to people with disabilities, especially for people with sight and hearing limitations and for those with intellectual disabilities. Accessibility of content is to be achieved through a gradual and incremental process that results in increasingly more accessible content from year to year. The AMD-G specifies for media services providers to draw up action plans as a means of implementation.

To harmonise these action plans, KommAustria enacted regulations in 2021 to ensure the comparability of data and to standardise form and content, also setting up a separate web interface in the eRTR-Portal to report action plans.

Six infringement procedures were initiated and completed with final effect in the reporting period in response to a suspected infringement of Art. 30b Par. 3 AMD-G, the requirement to submit a report to KommAustria concerning the implementation of the action plan and to publish this report.

## 2.2.9 Promotion of European works

During the reporting period, KommAustria received notifications of the funding of European works, to be submitted annually by 31 March, both from providers of on-demand audiovisual media services and from television broadcasters. The data so collected were submitted to the Federal Minister of Housing, Arts, Culture, Media and Sport for reporting to the European Commission.

No infringement procedures needed to be conducted in the 2025 reporting year.

## 2.2.10 Specific supervision of video-sharing platform providers

During the reporting period, no ex officio supervisory procedures were conducted to clarify whether requirements had been met for a video-sharing platform.

## 2.3 Market regulation

### 2.3.1 Public communications networks and services

Operators and providers must notify to KommAustria any planned provision of a public communications network or offer of a public communications service used to transmit broadcasts (radio and television programmes), or any offer of additional broadcasting services, as well as any changes to or discontinuation of such services. This notification requirement applies to all providers of such communications networks and all parties offering such services in Austria, regardless of their domicile. After receiving a complete notification report, KommAustria issues a confirmation (general authorisation) pursuant to Art. 6 Par. 3 in conjunction with Art. 199 Par. 2 No. 1 TKG 2021.

In practice, this notification requirement is especially significant in the case of broadcasting activities by cable network operators and IPTV providers. On the basis of the legal opinion of the European Court of Justice and its ruling of 30 April 2014 in case C-475/12, UPC DTH, certain services are considered broadcasting services and thus subject to notification requirements. Such services consist in detail of providing access rights to a package of programmes which contains radio and audiovisual broadcast services and is transmitted via satellite or cable in return for a fee.

In the reporting period, KommAustria was notified of one broadcasting network and the discontinuation of seven broadcasting networks.

### 2.3.2 Ex ante regulation under TKG 2021

Pursuant to the TKG 2021, KommAustria is also responsible for regulating competition among public communications networks and services used for radio and TV broadcasting. Relating to this context, , KommAustria issued a decision on 23 July 2024, thereby restating its opinion that the wholesale market for 'analogue terrestrial transmission of FM radio broadcasting signals to end users' continued to be a relevant market subject to sector-specific regulation. Within this market, Österreichische Rundfunksender GmbH & Co KG and ORS comm GmbH & Co KG (ORS) were once again jointly identified as a company with significant market power, with essentially the same ex ante regulations being imposed on this company as by the preliminary decision dated 31 January 2018. ORS appealed this decision before the BVwG and the procedure was still pending at the end of the reporting year.

In the 2025 reporting year, KommAustria also reviewed ORS' adherence with imposed obligations relating to the wholesale market for FM radio in 2024, specifically with regard to the cost accounting system and the question of whether the rates offered were in line with the costs of efficient service provision. A procedure to assess and potentially amend the specific duty to offer cost-related prices, as imposed by a decision of KommAustria issued on 23 July 2024, was initiated with regard to determining the weighted average cost of capital (WACC) to be applied in calculating the fair rate of return on capital. This procedure had not yet been completed by the end of the reporting year.

### 2.3.3 Merger procedures

As part of competition monitoring conducted by the Federal Competition Authority (BWB), KommAustria is given the opportunity to issue an opinion on cases involving competition in the media sector.

In this context, the BWB communicated to KommAustria 29 instances in 2025 where registration of company mergers affected media services.

For five of these registrations, KommAustria conducted a depth assessment of the impact of the merger on media diversity and the editorial independence of the companies involved in these mergers. In all of these cases, no substantiated risk of a significant impairment to these protected aspects was identified. In two of these cases, KommAustria issued a statement to the effect that the impairment was significant.

The European Media Freedom Act (EMFA) came into force on 8 August 2025. Article 22 of this act contains provisions applying to media market concentrations. Criteria are set out for the assessment of such concentrations, while requiring national media regulators such as KommAustria to play a principle role in such assessments. If, in making its assessment, KommAustria believes that a media market concentration is likely to affect the functioning of the internal market for media services, the authority must consult the European Board for Media Services (EBMS) in advance on its draft assessment. No such consultation was necessary during the reporting period.

## 2.4 Supervision of intermediary services (Digital Services Act)

### 2.4.1 General information

Initial reference is made here to the detailed separate report produced by KommAustria pursuant to Art. 55 of the Digital Services Act (DSA) on the application of the DSA by the authority.

At both national and European level, the second year of application of the DSA concentrated on the consolidation and development of the supervisory and cooperative structures in the context of the European Board for Digital Services (EBDS), pursuant to Art. 61 DSA. Another point of focus was cross-border collaboration among Digital Services Coordinators (DSCs), and between the DSCs and the European Commission (EC) pursuant to Art. 57 and 58 DSA. In the latter case, KommAustria primarily contributed national findings (complaints pursuant to Art. 53 DSA, ex officio findings pursuant to Art. 57) to procedures conducted by the European Commission against very large online platforms (VLOPs) and very large online search engines (VLOSEs). Although the first year of the DSA had been dominated by European and national elections, the second year was marked by youth protection issues and combating fraudulent online services. On 14 July 2025, the European Commission published a comprehensive set of guidelines on Art. 28 DSA (youth protection) for online platforms. In a session of the EBDS held on 18 November 2025, the Board and the European Commission also adopted the first report on the identification and assessment of the most prominent and recurrent systemic risks related to VLOPs/VLOSEs pursuant to Art. 35(2) DSA. In particular, the report identifies the effects of social networks on the mental health of minors, the rapid developments in the field of generative AI and the protection of intellectual property as noteworthy risks in this context. After preparatory consultations, the delegated regulation on data access pursuant to Art. 40(8) DSA entered into force on 29 October 2025. This regulation requires VLOPs or VLOSEs to grant data access for research work on systemic risks, to such researchers as are certified by the DSC for the provider's country of domicile. To this end, the DSCs have agreed a set of common coordination mechanisms, as researchers may also submit such requests in their own country of domicile. In such cases, the competent DSC completes an initial assessment pursuant to Art. 40(9) DSA although the final decision on the request is made by the DSC in the service provider's country of domicile.

At national level, KommAustria worked on structural consolidation by further establishing the Digital Services team within the RTR's Media Division that specialises in the enforcement of digital service regulations. This work also included the expansion of public relations and data analysis activities. KommAustria also conducted in-depth discussions with public-sector stakeholders and civil-society actors concerning the question of orders pursuant to Art. 9 and 10 DSA, online fraud, online hate speech and youth protection. The DSA envisages expanded options for exercising user rights, especially with regard to complaints. Seeing this as a high-priority task, KommAustria worked with the relevant working group at the EBDS on harmonising the handling of Austrian users' complaints, since jurisdiction over such complaints lies primarily with third countries—and Ireland in particular. Additional trusted flaggers were also certified to safeguard user rights. KommAustria conducted public relations work, including services for users and service providers on its website, while also organising a number of events. KommAustria also intensified information provided to civil-society organisations and authorities responsible for intermediary services.

## 2.4.2 Supervision of national service providers

As neither the DSA nor the Digital Services Coordinator Act (KDD-G) requires notification of affected services, KommAustria continued the mapping of Austrian online services started in the previous year. Roughly 500 intermediary services had been identified in the previous reporting period, with this number increasing to 560 in the period under review. Of these, around 50 are online platforms or marketplaces that are subject to the corresponding codes of conduct from the DSA unless exempted as micro or small enterprises pursuant to Art. 19 and Art 29 DSA. KommAustria was also informed about the existence of several online platforms subject to Austrian jurisdiction by other DSCs or the European Commission.

Providers of online platforms are also required to register for inclusion in the European Commission's DSA Transparency Database (accessible at <https://transparency.dsa.ec.europa.eu/>) and to complete an onboarding process. Following registration, such providers are then required by Art. 24(5) DSA to submit moderation decisions, including reasons, to the database, which can in turn be accessed by members of the public. In the case of online platforms that are subject to Austrian jurisdiction, this process is handled by KommAustria as the DSC. Since the last review period, KommAustria has provided the European Commission with information about 37 online platforms to be onboarded.

## 2.4.3 Complaints pursuant to Art. 53 DSA

Complaints pursuant to Art. 53 DSA are to be filed with the Digital Services Coordinator for the Member State in which the service recipient is located or established. However, a Digital Services Coordinator (DSC) is only competent to examine complaints about services where the main place of establishment is located or its legal representative resides in the DSC's Member State. Complaints about services mainly established in another Member State must be forwarded; an initial assessment by the DSC can be attached to this communication.

In 2025, KommAustria received 104 petitions—a high number when compared with the European average. Just under 6% of these petitions constituted queries where KommAustria lacked material competence and was therefore unable to continue these queries as complaints procedures. The remaining 94% of the petitions met the criteria for complaints pursuant to Art. 53 DSA, with 74% being lodged against VLOPs or VLOSEs. Typical (valid) reasons for complaints included: inadequate justifications for content moderation and—to a significant degree—service recipient account suspension (Art. 17 DSA, 'Statements of reasons'); inadequate reviews of such restrictions (Art. 20 DSA, 'Internal complaint-handling system'); and unsatisfactory implementation of the obligations, also incumbent on hosting service providers, to establish easily accessible and user-friendly notice and action mechanisms (Art 16 DSA).

Complaints about service providers having their main establishment in another Member State were relatively frequent. This is because many of the online platforms with the greatest reach—i.e. social networks categorised as VLOPs or VLOSEs—are established in Ireland. KommAustria reviewed these complaints on receipt, typically requested supporting information and then forwarded the complaints to the competent DSC together with an initial assessment. The complainant was kept informed of the forwarded complaint at regular

intervals, including the receipt of statements from the coordinator for the provider's place of establishment. It should be noted that these complaints were also used by the European Commission in procedures conducted against VLOPs, demonstrating how the new DSA governance system has been implemented in practice.

In two cases during the reporting period, a complaint resulted in the initiation of a procedure against an Austrian service provider. Both of these procedures are still pending.

#### 2.4.4 Certification of out-of-court dispute settlement bodies (Art. 21 DSA)

Not a single application for certification as an out-of-court dispute settlement body was received by KommAustria in the 2025 reporting period. However, one VLOP submitted a request for party status to be determined in a licensing procedure, completed in 2024, for the RTR's Media Division as out-of-court dispute settlement body. This request to determine party status was dismissed pursuant to Art. 21(3) DSA in conjunction with Art. 8 of the General Administrative Procedure Act (AVG) in the reporting year. The VLOP subsequently appealed the decision to the BVwG.

#### 2.4.5 Certification of trusted flaggers (Art. 22 DSA)

During the reporting period, a total of five new applications for certification as a trusted flagger were submitted. KommAustria also issued a negative decision for one application for certification submitted at the end of 2024.

KommAustria granted certified trusted flagger status to two organisations.

- The first was 'ZARA – Zivilcourage und Anti-Rassismus-Arbeit' ('ZARA – Civil Courage and Combating Racism'), an association that was awarded trusted flagger status by a decision dated 30 April 2025 for a scope including anti-discrimination law, unlawful hate speech, online hate crimes motivated by prejudice and cyber violence.
- The second organisation was AUSTRO-MECHANA Gesellschaft zur Wahrnehmung mechanisch-musikalischer Urheberrechte Gesellschaft m.b.H., which by a decision dated 13 November 2025 was awarded trusted flagger status for mechanical musical copyright, in particular the private copying levy.

KommAustria rejected the remaining three applications for granting certified trusted flagger status.

In one case, the application for trusted flagger status had been submitted by an individual rather than an organisation. This application also lacked any supporting evidence of the necessary domain knowledge and expertise in the identification, determination and reporting of unlawful content for the area applied for.

In a second case, the application was indeed submitted by an organisation, which however failed to provide any supporting evidence of the domain knowledge and expertise that would be necessary for the specific unlawful content in the area applied for.

In the third and final case, the applicant failed to provide sufficient evidence of eligibility for trusted flagger status.

Yet one more application for certified trusted flagger status was received during the reporting period. The procedure could not be completed in the reporting period.

In the period under review, KommAustria received annual reports from three trusted flaggers, namely: the Schutzverband gegen unlauteren Wettbewerb (Association Against Unfair Competition), LSG-Wahrnehmung von Leistungsschutzrechten GmbH and Rat auf Draht gemeinnützige GmbH. The notices submitted by these organisations related predominantly to consumer protection violations, intellectual property infringements and protection of minors violations. Without prejudice to any findings by the other trusted flaggers in Austria, these three reports provide reliable evidence of online platforms responding appropriately to the notices submitted, with only a few providers in fact failing to do so.

## 2.4.6 Orders pursuant to Art. 9 and 10 DSA

During the period under review, authorities referred a total of five orders pursuant to Art. 10 DSA (orders to provide information) to KommAustria. These orders concerned a number of service providers. In three cases, orders to provide information were addressed to a VLOP and the service provider declined to comply, invoking the United States as their jurisdiction and referring the issuing authority to the mutual legal assistance procedure. KommAustria was also referred another order to provide information that had been issued to the same VLOP, with the latter failing to respond to the order by the end of the reporting period.

KommAustria received another order to provide information addressed to a second VLOP, which refused to provide the requested data, stating that the request did not meet the requirements for an order to provide information pursuant to Art. 10 DSA.

No orders to provide information pursuant to Art. 9 DSA have been referred to date.

Talks have been held with other Digital Services Coordinators and the European Commission to share experience gained to date. These discussions have demonstrated a need to clarify many issues of a legal and practical nature in relation to such orders. KommAustria is the vice-chair in the relevant working group at the EBDS, which is chaired by the European Commission.

## 2.4.7 Vetted researchers (Art. 40(8) DSA)

As mentioned above, the delegated regulation for implementing DSA provisions entered into force on 29 October 2025.

This sets out the detailed rules for the DSA by specifying procedures and technical conditions for granting vetted researchers access to data held by providers of VLOPs and VLOSEs. The regulation defines the technical conditions for the design and operation of a data access portal while also harmonising the procedures for managing the data access process.

The European Commission simultaneously established the DSA Data Access Portal, which grants interested researchers access to information and also offers them a means of submitting their applications directly to the competent DSCs.

While interest has been expressed and general enquiries about data access pursuant to Art. 40(8) DSA have been received, no requests were submitted to KommAustria in the reporting period.

## 2.4.8 Cooperation with authorities and stakeholder dialogue

As mentioned, KommAustria stepped up its dialogue with authorities having competence in DSA matters during the reporting year. In particular, these included: the Federal Ministry of Justice (BMJ), the Federal Chancellery, the Federal Ministry of Women, Science and Research (BMFWF), the Federal Ministry of Labour, Social Affairs, Health, Care and Consumer Protection (BMASGPK), the Federal Ministry of Housing, Arts, Culture, Media and Sport (BMWKMS), the Federal Ministry of Education (BMB), the Federal Ministry for European and International Affairs, the Federal Ministry of the Interior (BMI), and the Federal Ministry of Economy, Energy and Tourism (BMWET). KommAustria also liaised closely with the Austrian Data Protection Authority (DSB) and the Financial Market Authority (FMA) as well as law enforcement agencies, including the provincial police directorates, the Federal Police and the Directorate of State Security and Intelligence (DSN).

KommAustria also maintained regular dialogue with the certified trusted flaggers in accordance with the provisions of Art. 22 DSA. In addition, KommAustria communicated actively with other representatives of civil society, particularly with interested HEIs—such as the Austrian Institute of Technology (AIT), the German-Austrian hub of the European Digital Media Observatory (GADMO) and the Austrian Academy of Sciences—and with organisations such as Internet Service Providers Austria (ISPA) who represent ISP interests.

KommAustria also participated in multilateral dialogue forums such as the Safer Internet Advisory Board, the ECRI Round Table on Hate Speech and the No Hate Speech Committee.

## 2.4.9 Dialogue with authorities (Art. 3 Par. 5 KDD-G)

In accordance with Art. 3 Par. 5 KDD-G, KommAustria has a legal obligation to engage in regular dialogue with those authorities similarly tasked with monitoring and implementing codes of conduct applying to providers of intermediary services.

The first such dialogue session with other authorities—which was expanded to include civil-society representatives including trusted flaggers—was held on RTR's premises on 5 June 2025. The session was attended by the BMFWF, the Austrian Chamber of Labour, the Federal Criminal Police Office, the Federal Competition Authority (BWB), the Vienna Children's and Youth Ombudsman, the BMI, the DSB, the Austrian rail regulatory authority (Schienen-Control), the BMB, the Federal Chancellery (BKA) and the BMASGPK. The session focused in particular on reports covering recent developments at national and European level, with key topics including progress made in the relevant working groups, the integration of codes of conduct into the DSA and Commission guidelines pursuant to Art. 28 DSA (youth protection). The attendees discussed questions of practical implementation at length, particularly in connection with potential age verification models to be used by online platforms.

Another session was held on 17 December 2025. Participating organisations included: the Federal Office for Safety in Health Care (BASG), the Vienna Children's and Youth Ombudsman, LSG-Wahrnehmung von Leistungsschutzrechten GmbH, the BKA, the Federal Office of Metrology and Surveying (BEV), the BMI, the Provincial Criminal Investigation Office, the Austrian Chamber of Labour, the DSB, the Austrian Institute for Applied Telecommunications (ÖIAT), the BMASGPK, the DSN, and the BMB. The agenda for this session included: the EBDS work programme for 2026, progress made in the procedures conducted by the European Commission against VLOPs, the practical application of the guidelines on youth protection, the first report from the EBDS and the European Commission on systemic risks from VLOPs and VLOSEs, the guidelines on research data access, and Art. 9 and 10 DSA.

## 2.5 Act on Transparency in Media Cooperation and Funding

The Act on Transparency in Media Cooperation and Funding (MedKF-TG) imposes duties of disclosure, relating to media cooperation and funding, on legal entities subject to the supervision of the Austrian Court of Audit (ACA). Aim and purpose of the act is to ensure full transparency concerning the awarding of advertising contracts and the funding of public authorities.

To achieve this objective, the act provides for two types of disclosure measure:

- First, KommAustria publishes lists classifying legal entities as those that have fulfilled their reporting obligations by the regular reporting deadline and those that have not done so ('traffic light list').
- Second, KommAustria publishes the data notified by the legal entities and a visualisation of this data.

In comparison with the legal situation prior to 2024, the number of legal entities required to report was largely unchanged at around 5,300 entities per reporting phase. However, the amended act has resulted in a significant increase in the number of entities reporting advertising contracts, the total spend reported, and the volume of reports received.

- The number of legal entities notifying advertising orders almost tripled. In the first three reporting periods since the entry into force of the amendment, around 1,400 legal entities submitted a report in fulfilment of their legal duty to do so. Under the previous legal framework in force in 2023, only an average of 500 legal entities had submitted quarterly reports on advertising placements and subsidies.
- A total volume of EUR 813.7 million was reported for the first three six-month periods since the entry into force of the amendment. Of this volume, EUR 680.7 million was spent on advertising and public information placements, with reported subsidies totalling EUR 133 million.

Since 15 October 2024, all reported data has been available on the RTR website at <https://visualisierung.medientransparenz.rtr.at/>. The data are visualised as interactive diagrams and graphics, and presented together with the subjects of the advertising/public information placements. Data for earlier reporting periods since 2020 are also available as open data.

A summary procedure pursuant to Art. 47 of the Administrative Offences Act (VStG) was used to issue punitive orders against 20 legal entities who did not fulfil their reporting duties despite being granted a four-week grace period to do so.

## 2.6 Act Addressing Terrorist Content

KommAustria is the competent authority as defined by the TCO Regulation. The TCO Regulation aims to counter and contain terrorist online content within the European Union. Terrorist online content is to be taken from the internet as soon as possible, thereby helping to improve public safety throughout the Union as a whole.

In 2025, KommAustria sent four takedown orders to two hosting service providers (HSPs) established outside Austria (Ireland, USA). The HSPs complied with all orders and removed the offending content within the legal deadline of one hour after receiving the order, within 15 minutes in fact in all cases. All takedown orders were in relation to terrorist content of a jihadist nature.

In addition, the authority opted for a referral rather than a removal order in ten (other) cases. This less intrusive measure notifies an HSP that a piece of content may have relevance for the TCO Regulation, and asks the provider to review this content for compliance with their terms and conditions of use. In all ten cases, this review by the (respective) HSP identified the affected content as incompatible with their terms and conditions of use, and the content was thus promptly removed.

## 2.7 Enforcement of EU sanctions

KommAustria maintains a list of online services currently classified as unlawful on a without-prejudice basis. KommAustria extended this list to include the official websites of media companies subject to new sanctions as of 9 April 2025 in the context of the EU's 16th package of sanctions concerning restrictive measures in view of Russia's actions destabilising the situation in Ukraine. KommAustria also informed the industry associations of the national providers affected by the law promptly, that is, before the European sanctions package became effective.

## 2.8 Administration and coordination of broadcasting frequencies

In Austria, frequency spectrum for the conventional terrestrial and antenna-based broadcasting of radio stations and television channels is managed by KommAustria. The terrestrial broadcasting spectrum consists of various frequency bands, each of which is allocated to a certain broadcasting system. The frequency bands permitted for use by the individual broadcasting systems is defined in the Radio Regulations of the International Telecommunication Union (ITU), and in the Frequency Utilisation Ordinance of the Republic of Austria.

Analogue radio (FM), digital radio (DAB+) and digital television (DVB-T/T2) are the broadcasting systems of commercial relevance in Austria, correspondingly offering large-scale coverage and being of public interest.

In managing broadcasting spectrum, the authority receives support from the RFFM department within the Media Division at RTR. This work includes the preparation of spectrum evaluation reports during licence award procedures, international frequency coordination, and bilateral/multilateral frequency negotiations with neighbouring countries. As the signals broadcast by transmitters often extend far into other territories, broadcasting frequencies need to be negotiated with neighbouring countries as part of regulators' coordination procedures, so as to avoid mutual interference when receiving broadcasts from the transmitters. The details of such coordination activities are set out in the international agreements that have been and continue to be negotiated at the ITU's regional radiocommunication conferences.

RFFM staff also participate in the international working groups organised by the CEPT, the EU and the ITU with the aim of introducing and representing Austrian interests related to the use of the broadcasting spectrum.

### 2.8.1 Reports relating to FM radio 87.6 to 107.9 MHz

During award procedures in 2025, KommAustria once again commissioned evaluation reports relating to spectrum, resulting in numerous expert opinions. These focused primarily on requested changes to the coverage areas, particularly measures to extend or increase the density of networks, although some opinions also addressed licensing and licence renewal procedures. These were analysed as requested in terms of broadcast spectrum and expert opinions prepared.

Comprehensive spectrum assessments, analyses and reach calculations were also prepared in the course of KommAustria authorising a third nationwide commercial FM radio licence.

Preceded by a call for tenders, expert opinions were also prepared for licensing procedures, in one case relating to three new transmission capacities in southern Styria, and another because of a licence relinquished by an operator in Salzburg.

As in previous years, numerous applications were received during the reporting year for extensions to existing FM licences throughout Austria, and for changes to the technical parameters of existing broadcasting systems. The third nationwide licensee also extended their coverage area by taking over a licence in Salzburg: this required the preparation of an extensive expert opinion on the relevant spectrum. In the case of older radio transmitters, where more precise technical data has since become available, database records needed

to be significantly updated or revised.

In 2025, KommAustria also converted the ORF's FM licences from an indefinite term to a fixed term of ten years, to comply with new legal requirements. Spectrum assessments were completed for the affected broadcasting systems and the corresponding technical data sheets issued.

A test transmission was conducted for a medium-wave frequency in Lower Austria at the border with Upper Austria, with the aim of determining the potential coverage area. In Klosterneuburg, an FM frequency was brought into service as part of a test transmission to establish whether this frequency could be operated in practice without interference, as the relevant calculation data had proven to be inconclusive.

As in past years, expert opinions were also prepared in the year under review for the educational radio stations at Deutschlandsberg, Vösendorf and Freistadt, as well as for the St. Pölten campus radio station and the educational radio station in Vienna. KommAustria also prepared an expert opinion on spectrum for an application for a new educational radio service in Ried im Innkreis, accompanied by extensive spectrum-related measurements in Innviertel.

An event radio service in Salzburg was also processed as part of frequency management work.

Other such work involved telecommunications licences for FM tunnel radio systems, which had expired after ten years or for which application amendments had been submitted, with the necessary permit documentation having to be prepared.

KommAustria also processed numerous applications for low-power FM broadcasting licences, to be used for purposes as varied as drive-in cinema, audio descriptions, cultural events and civil defence exercises. The RFFM department subsequently had to evaluate the frequencies used by these applications to exclude any chance of disruption to existing radio broadcasting stations.

## 2.8.2 Reports relating to digital television 470 to 694 MHz

Spectrum evaluation reports were also prepared for the extension of 5G Broadcast test operations, involving channel 45 at the broadcasting transmitter sites WIEN 1, WIEN 8 and WIEN 9, as well as channel 42 at WIEN 8 and WIEN 9.

As part of frequency management in relation to telecommunications licences for events, the use of TV channel 42 at locations including Vienna (ORF Centre), Hausleiten, Campus St. Pölten, Wiener Neustadt, TGM in Vienna and TU Vienna was reviewed in accordance with applications to permit low-power 5G broadcast transmitters.

The expert opinion on spectrum prepared for the 2025 Digitisation Plan included a definition of the spectrum planning framework for the new tenders for multiplex A and multiplex B.

## 2.8.3 Reports relating to digital radio (DAB+) 174 to 230 MHz

The German broadcaster Bayerischer Rundfunk operates several broadcasting transmitters close to the German border but on Austrian territory, at Pfänder, Inntal Ebbs and Untersberg. Applications for extensions to various telecommunications licences for these transmitters were also processed as part of frequency management.

Licences for tunnel radio test systems in Vösendorf and Rannersdorf were also renewed for another year.

As a result of amended applications for the station line-ups carried by various multiplexes, corresponding service IDs needed to be assigned or, with existing simultaneous broadcasting, adapted to match the FM PI codes. Coverage areas also required reviewing to identify overlaps.

In the course of preparing the expert opinion on spectrum for the 2025 Digitisation Plan, a reallocation of the frequency resources available to Austria for this frequency range was completed in accordance with the specific criteria set by KommAustria.

## 2.8.4 Frequency coordination procedures and frequency usage

At the invitation of the Swiss Federal Office of Communications (OFCOM), a two-day multilateral meeting was held from 16 to 17 September 2025 in Biel, attended by OFCOM and its counterparts from Austria, Germany, Switzerland and Liechtenstein (ADSL Group). Also present at the meeting were representatives of broadcasting network operators from Austria and Germany. Discussions ranged from general broadcasting topics to information about specific frequency plans and pending coordination requests.

A specific change proposal was submitted by the Austrian delegation for the existing coordination agreement from 2017 on the use of DAB+ frequency blocks at the Pfänder transmitter location in Vorarlberg. This was discussed at length and ultimately accepted.

For the geographic region in which broadcasting transmitters from Austria, Germany and Switzerland may cause mutual radio interference as a result of transmitter proximity, consultations were held on a number of specific implementation proposals, with the aim of improving DAB+ coverage for citizens through the efficient use of spectrum.

In the FM frequency range, the total number of international ITU coordination procedures in which Austria participated declined slightly once again from previous years.

In the case of digital radio (DAB+), numerous broadcasters were again internationally coordinated this year and completed registration in the corresponding Geneva Frequency Plan in accordance with international requirements.

Many DAB+ broadcasters who had already successfully completed coordination with their immediate neighbours needed to be coordinated with other administrations as per the GE06 Agreement, which had led to delays in the GE06 notification process.

For digital television (DVB-T/T2), little activity was seen in frequency planning—both in Austria and its neighbouring countries.

This year also saw a continuation of 5G broadcasting trials in Vienna. As in previous years, these trials made use of a television channel temporarily provided for this purpose by the Slovakian administration.

The following table lists for the reporting year the number of international broadcasting frequency coordination procedures that were completed with Austria as a participant, broken down by country and broadcasting service:

**Table 09: Number of international broadcasting frequency coordination procedures in 2025**  
(\*MW = medium wave)

Country	Analogue radio	Digital radio	Digital television
Austria	23, one of which MW*	44	2
Bosnia	1		
Germany	4	48	1
France	9		
Croatia	1		
Liechtenstein		3	
Poland	5	1	
Switzerland		15	
Slovakia	4	37	2
Slovenia	4		
Czechia	31	15	2
Hungary	7		
<b>TOTAL</b>	<b>88</b>	<b>163</b>	<b>7</b>
<b>ITU registrations</b>	<b>42</b>	<b>97</b>	<b>8</b>

The ITU registrations listed in the last row of the table relate to coordination procedures for which Austria was required to issue a statement, as these registrations had not been bilaterally agreed with Austria beforehand.

As with all other bilateral coordination requests listed in the table, these were also subjected to a frequency assessment to determine their compatibility with Austrian transmitters. During the reporting year, the RFFM department processed 25 ITU circulars with publications in the Geneva frequency plans.

A total of 50 Austrian broadcasting transmitters were registered in the Master International Frequency Register (MIFR). Managed by the ITU, the MIFR is a database that contains data, including technical parameters, for the broadcasting transmitters currently in operation. Administrations use this database for example as a source of information when troubleshooting harmful interference. It also serves as a basis for strategic decisions on frequency allotments in the context of negotiations on the ITU Radio Regulations.

## 2.8.5 Measurement projects

Again in 2025, FM measurements were conducted as part of commissioned expert opinion and coordination procedures. Several of these measurements related to central and southern Burgenland, as well as regions west of Vienna, particularly the Traisen Valley north of St. Pölten. During a test transmission for a planned radio transmitter in Klosterneuburg, measurements were carried out to assess potential interference with other broadcasting transmitters. As part of another test transmission in Ernsthofen, a coverage area for a medium-wave frequency was surveyed together with the telecommunications office. Several FM and DAB+ reference measurements were completed in the Linz and St. Pölten areas. These measurements were used for international frequency coordination and for comparison with theoretical calculations from the broadcast planning software used by RFFM staff.

Various checks of operating conditions for broadcasting systems were also carried out in the reporting year.

## 2.8.6 Frequency register

The current frequency register and transmitter map list approximately 1,450 radio transmitters in the FM band in the 87.6 MHz–107.9 MHz range, with power output varying from less than 1 W to 100 kW.

The ORF accounts for roughly 850 frequencies or transmission capacities, while the remaining spectrum is used by private broadcasters.

In the 470 to 694 MHz television frequency band, the currently approved DVB-T/T2 transmitters listed in the frequency register were distributed among the individual multiplex platforms as at the end of 2025 as shown here (see table below).

**Table 10: Approved DVB-T/T2 transmitters (as of 31 December 2025)**

Multiplex	Number of broadcasting transmitters
DVB-T2 multiplex A (ORS multiplex)	317
DVB-T2 multiplex B (ORS multiplex)	43
DVB-T/T2 multiplex C (regional/local multiplex platforms)	31
DVB-T2 multiplex D (ORS comm multiplex)	43
DVB-T2 multiplex E (ORS comm multiplex)	43
DVB-T2 multiplex F (ORS comm multiplex)	43

The 31 approved transmitters in the DVB-T/T2 multiplex C platform are operated by ORS comm and ten other commercial licensees.

In VHF band III, which is reserved for DAB+, the following DAB+ multiplexes were approved as at the end of 2025:

**Table 11: Approved DAB+ transmitters (as of 31 December 2025)**

Multiplex	Number of broadcasting transmitters
DAB+ multiplex I (ORS comm)	15
DAB+ multiplex II (RTG Radio Technikum GmbH)	1
DAB+ multiplex II (ORS comm)	15
DAB+ multiplex III (ORS comm)	15

Data on approved broadcasting transmitters have been made available to the public on the RTR website ([www.rtr.at](http://www.rtr.at)) in the form of a transmitter map as well as Open Data tables.

## 2.9 EU bodies

### 2.9.1 EBMS

KommAustria consistently maintained its high level of participation and involvement in international bodies in 2025. The work of the newly established European Board for Media Services (EBMS, 'Media Board'; successor organisation to ERGA) focused on cooperation between national media authorities at European level. The inaugural plenary meeting of the EBMS was held on 10 February 2025, following the entry into force of the EMFA. Within this new institutional framework, the EBMS proceeded to continue the international activities initiated by ERGA. ERGA's 2025 work programme was implemented in full before the group's mandate ended on 31 December 2025.

KommAustria and RTR's Media Division were represented in all six EBMS working groups that had been established based on the work programme. This active participation is instrumental in ensuring that the interests and goals of the Austrian media markets are provided with a level and harmonised playing field within an EU context, and one that is, wherever possible, also aligned with the positions of other EU Member States.

#### 2.9.1.1 Working group for audiovisual media matters

In 2025, the tasks assigned to this working group included the continuation of consolidation efforts on the part of ERGA to improve enforcement of the EU's legislative framework for audiovisual media services, as well as the collection of relevant findings for implementation and potential future development of this regulatory framework. The workstreams sought to build on and complement ERGA's previous achievements in this area. Key points of focus included the promotion of European works, the development of youth protection criteria in relation to harmful content, and a comparison of legal frameworks applicable to influencers and vloggers in Member States.

#### 2.9.1.2 Working group for pluralism and media markets

This working group was established with the twin responsibilities of providing substantive guidance on key aspects of EMFA implementation—especially in relation to pluralism and media markets—and preparing the respective opinions for the EBMS.

The working group has implemented certain pillars within the Media Board's medium-term strategy, referencing a number of key priorities, including: the smooth launch of the Media Board and the effective deployment of its activities (strategic priority 1); provision of expertise and guidance for a convergent European regulatory approach (strategic priority 2); and effective functioning of the internal media market

in a constantly evolving environment (strategic priority 3). The work of this group thus focused primarily on the preparation of internal guidance for the uniform application of EMFA provisions on market concentrations and the development of the process for issuing EBMS opinions. The group also commenced work on the preparation of uniform standards for media service provider databases, which aim to create transparency about ownership structures in the media sector.

### **2.9.1.3 Working group on the media business environment**

This working group played a major role in executing parts of EBMS strategy, with implementation monitoring for Art. 18, 19, 20 and 24 of the EMFA being a key point of focus. The provisions contained within these articles aim to ensure the efficient operation of the internal market for media services as well as the economic viability and resilience of the media sector. The rules thus serve to promote competition within the media ecosystem, at the same time fostering media pluralism and editorial independence among media service providers in the internal market. The work of this group therefore focused on supporting implementation of EMFA regulations on audience measurement and users' rights to customise the media offer.

### **2.9.1.4 Working group on the evolution of the regulatory framework**

This group was set up in 2025 with the aim of supporting the European Commission in its ex-post evaluation of the Audiovisual Media Services Directive (AVMSD). To this end, the group worked to identify potential areas in which a revision of the AVMSD could be considered appropriate. In particular, such areas included cross-border enforcement aspects and issues related to video-sharing platform services, including potential adjustments to scope, the legal instrument and quantitative advertising rules. Besides these issues, the working group also looked at potential areas of overlap between the provisions of the AVMSD and other items of European legislation—first and foremost the DSA and the EMFA.

### **2.9.1.5 Working group on the integrity of the information space**

The work of this group in 2025 focused primarily on key topics such as monitoring the implementation of the code of conduct on disinformation, and preparing for implementing the EU regulation on political advertising. Other points of focus included coordination work and dialogue relating to media literacy activities, and the provision of support to the European Commission and members of the EBMS for the application of the EMFA. In particular, the group fostered the exchange of best practices on the visibility of general-interest audiovisual media services.

### **2.9.1.6 Working group for internal and external cooperation**

The principal aim of this group was to develop a framework for the various cooperation and coordination mechanisms as envisaged by the EMFA. In particular, these activities encompassed the following: structured cooperation between national regulatory authorities of EU Member States as explicitly required by the EMFA; development of criteria for use by the national regulatory authorities or competent bodies when taking measures to restrict the dissemination of media services from outside the EU; and cooperation with other Union bodies and agencies in cases where issues exceed the scope of audiovisual media services.

Last but not least, the last plenary meeting in 2025 also served to host the elections for the chair of the EBMS for 2026. Amma Asante, director of the Dutch media authority Commissariaat voor de Media, was duly elected chair of the Media Board for 2026.

## 2.9.2 European Board for Digital Services (EBDS)

KommAustria's activities within the European Board for Digital Services (EBDS) and its working groups is closely related to and informed by the implementation of the European DSA and the Digital Services Coordinator Act (KDD-G) in Austria. Work in the reporting period focused in particular on intensifying and consolidating cooperation among the DSCs and with the European Commission. Together, the EBDS, the European Commission and the DSCs constitute a framework that aims to guarantee EU-wide implementation of the DSA in accordance with a common understanding of the relevant legal basis. The activities of the EBDS therefore play a decisive role in the enforcement of the legislation at national level, a subject also discussed in the working groups. Alongside reports from the European Commission about the procedures conducted against VLOPs and VLOSEs, the EBDS also discusses strategic points of interest. Youth protection, online fraud and systemic risks in relation to VLOPs were key priorities in the reporting period.

The EBDS held ten sessions in the reporting period, alternating between in-person and online formats. These included ad-hoc sessions, in cases concerning which the EBDS' right to be heard in procedures conducted by the European Commission against one provider of VLOPs, and involving coordinated measures at EU level to improve the protection of minors from pornographic content. One ad-hoc session of the EBDS was also held to contribute input to the European Commission guidelines on measures intended to ensure a high level of privacy, safety and security for minors online, as envisaged by Art. 28(4) DSA. As the DSC for Austria, KommAustria participated in all sessions of the Board and exercised its voting right.

The eight working groups of the EBDS also addressed various key aspects of the DSA in depth during the course of the period under review. All working groups were chaired by the European Commission. Each group also elects a DSC to serve as its vice-chair for a period of one year. During the reporting period, KommAustria served as the vice-chair of Working Group 7, which is responsible for orders pursuant to Art. 9 and 10 DSA as well as criminal issues.

KommAustria has a seat in all working groups including subgroups (known as 'workstreams'), making an active contribution to these activities.

### 2.9.2.1 Working Group 1—Horizontal and legal issues

This working group focuses on questions of interpretation and definition, including the legal classification of certain services within DSA terminology, which builds on the definitions in the Electronic Commerce Directive, and determining providers' main establishment, an issue not always clear beyond doubt. Another focus is intersection of the DSA with similar legislation applying to digital space. The group has set up two specific workstreams. One workstream addressed the definition of the term 'ancillary features and functionalities' for online platforms, which is an important criterion when determining the applicable scope of the DSA. The second workstream focused on interpreting the terms 'service', 'provider' and 'main establishment', also with wide-ranging implications for national legal supervision.

### 2.9.2.2 Working Group 2—Working together

This working group focused on Board reporting, which includes the Digital Services Coordinator activity reports as required by Art. 55 DSA and the reports on systemic risks pursuant to Art. 35(2) DSA. The group also addressed cross-border cooperation on complaints as set out in Art. 53 DSA, as well as related coordination among DSCs. Another workstream was also set up for addressing the issue of out-of-court dispute settlement pursuant to Art. 21 DSA. This working group is also home to the newly established network for communications experts.

### 2.9.2.3 Working Group 3 —Content moderation and data access

One point of focus for this group in the period under review was the European Commission's project to publish guidelines for the certification of trusted flaggers (as defined in Art. 22(8) DSA), still pending by the end of the reporting period. The group also worked on preparing a delegated act on data access, which, in accordance with Art. 40(13) DSA, sets out the technical conditions for certifications pursuant to Art. 40(8) DSA. This delegated act, which entered into force on 29 October 2025, contains specific provisions for the procedural aspects of certification. Requests of this kind to DSCs have been possible since that date.

### 2.9.2.4 Working Group 4 —Integrity of the information space

This working group focused primarily on the electoral processes in Member States. In February 2025, the Commission and the European Board for Digital Services endorsed the Code of Conduct on Disinformation pursuant to Art. 45 DSA, which had been converted by this working group from the Code of Practice on Disinformation. At the same time, the Commission also published a toolkit developed by the working group. It not only offers practical advice and a recommended methodology for applying the electoral guidelines of the DSA to electoral processes but also helps national regulatory authorities to manage risks related to VLOPs and VLOSEs.

### 2.9.2.5 Working Group 5—Consumers and online marketplaces

In comparison with the previous reporting period, this working group's mandate was expanded to include Art. 25 and 26 DSA. Alongside a continued focus on the important area of online marketplaces, the group's remit now also covers dark patterns (manipulative UI/UX designs) and advertising on online platforms.

During the reporting period, this group concentrated its resources on tackling the workstreams (subgroups) established in the summer of 2025 by the European Commission. These workstreams focused on regulatory competencies in relation to e-commerce (workstream 1) and online fraud (workstream 2). KommAustria was appointed interim coordinator of workstream 2, as one point of focus in this authority's work at national level is the application of DSA instruments for the purpose of combating online fraud.

In November, the EBDS also established a coordinated initiative for supporting DSA enforcement in the face of risks posed by online fraud. This initiative aims to develop a long-term and systematic approach to tackling online fraud, to make use of the existing instruments for implementation as provided by the DSA, and to cooperate with various partners including consumer protection groups, financial regulators, institutions that specialise in countering online fraud, and law enforcement authorities. To achieve these goals, the working group intends to map the institutions and authorities working in this field, as well as any existing initiatives.

### 2.9.2.6 Working Group 6 —Protection of minors

On 14 July 2025, the European Commission adopted a set of guidelines that set out in detail the requirements for online platforms in relation to appropriate and proportionate measures for youth protection pursuant to Art. 28 DSA. At the same time, source code for an EU age verification solution was made available. The aim is a reliable age verification method that complies with data protection laws and potentially serves as an interim solution pending the rollout of the EUDI Wallet. A task force for coordinated action against providers of pornographic content was also set up as a workstream in summer 2025.

Since late 2025, the group has worked on a coordinated implementation strategy for the guidelines, including common criteria for assessing the compliance of national online platforms with due diligence obligations pursuant to Art. 28 DSA.

### 2.9.2.7 Working Group 7 —Orders and criminal issues

As vice-chair of this working group (see above), KommAustria has a key role to play in determining this group's working goals, timetable and session organisation. During the reporting period, the group mapped extant national legal frameworks for removal orders and orders to provide information pursuant to Art. 9 and 10 DSA, as well as criminal offences covered by the scope of Art. 18 DSA. The group works closely with national law enforcement agencies and Europol.

Since the establishment of working group 7 in September 2024, a total of twelve sessions had been held by December 2025. Key points of focus for these sessions included in-depth discussions of the challenges and practical experience at national level with orders pursuant to Art. 9 and 10 DSA. These discussions also touched on service providers, with such orders now increasingly common in many Member States. Affected national authorities from Member States attended some of these sessions, reporting on their experience from practice and furthering the expert discussion of these matters. The aim on completion of these comprehensive survey activities is to develop practical guides on these key provisions, to be used by authorities (Digital Services Coordinators, national authorities and courts). In view of the need to achieve a uniform interpretation of Art. 18 DSA and any related challenges for the various authorities and Digital Services Coordinators (DSCs), the group drafted a questionnaire for use by DSCs, service providers, law enforcement agencies, hosting service providers and civil-society organisations. The data survey aimed to resolve uncertainties regarding types of criminal offences to be included, and the extent of information needing to be provided. To identify any need for improvement, the consultation also sought to obtain operational feedback for the notification procedure by drawing on the experience of both parties to this procedure—law enforcement/judicial authorities on the one hand, service providers on the other.

### 2.9.2.8 Working Group 8 —IT issues

Article 85 of the DSA codifies the requirements for an information sharing system. To be used for communications between national regulatory authorities, the system will play a key role in coordinated application of the DSA. This application must therefore be especially secure, and the system is being optimised on an ongoing basis.

### 2.9.2.9 Bilateral affairs

Although cooperation among Digital Services Coordinators is multilateral in nature, a number of topics needed a more thorough treatment and therefore required intensive bilateral consultation with coordinators from other Member States. Group sessions were therefore held during the period under review with Arcom (France), the Federal Network Agency (Germany), the Coimisiún na Meán (Ireland), AGCOM (Italy) and the European Commission.

One session of particular note was the joint online event organised by KommAustria and the French DSC Autorité de régulation de la communication audiovisuelle et numérique (Arcom) on 10 November 2025. This meeting, attended by all coordinators, was the occasion for discussing a draft code of conduct for the application of AI to content moderation. This draft had been prepared by Matthias Kettemann as part of a research project at the Alexander von Humboldt Institute for Internet and Society.

### 2.9.3 EPRA

EPRA is a network of 55 media regulatory authorities from 47 countries both within and outside the European Union.

Two EPRA meetings were held in 2025, with the following priorities set:

Protection of minors online: Protecting minors and upholding their rights online were recurring topics in the two EPRA sessions, reflecting the importance of this area as a key target for regulation within all legal jurisdictions. In practical terms, regulatory efforts focus on protecting minors active on video and social media platforms. EPRA members analysed existing instruments and approaches, while also discussing the question of how the creation of safeguards for minors can be harmonised with an approach based on the rights of the child.

The first session of the year also addressed the question of “What does it mean to be an evidence-based regulator?” Statements received on the consultation for EPRA’s 2025 work programme had revealed a significant level of interest among members for a more detailed discussion of internal governance processes. Members worked in small groups to examine the question of evidence-based working practices for media regulators and why recent developments have made this approach particularly significant.

One of the key themes for the second EPRA meeting in 2025 was “Defining, promoting and safeguarding media pluralism in the digital age”. As a complex and still-evolving concept, media pluralism was naturally an important point of focus for EPRA’s 2025 work programme. Here attention was devoted to the dynamic interplay between media pluralism, platform governance and artificial intelligence (AI) technologies. Attendees discussed how AI can work to strengthen diversity on the one hand while also noting the inherent risks of using AI, stemming from algorithmic bias, power concentration and weakened editorial transparency.

KommAustria and RTR’s Media Division once again played an active part in EPRA’s activities in 2025, making a significant contribution to the results achieved by implementing the 2025 EPRA work programme.

International cooperation—both within the European Union and beyond its borders—is a significant instrument for expanding regulatory perspectives, as experience and insights gained in other markets can also be applied to domestic media markets.

### 2.9.4 Cooperation of consumer protection authorities

KommAustria is the competent consumer protection authority for cooperation with consumer authorities at EU level. To enforce decisions on intra-EU (cross-border) infringements of certain significant consumer protection regulations, a corresponding network of consumer protection authorities has been set up, with the aim of addressing and preventing harmful practices. In the context of media services, these regulations apply to commercial communication.

As part of related duties, KommAustria routinely fulfilled its responsibilities in the field of advertising monitoring during 2025. KommAustria was particularly active in the discussion sessions and workshops organised by the network of consumer protection authorities. Participating authorities had an opportunity to share best practices while refreshing and deepening their appreciation of the challenges faced in their areas of responsibility.

## 2.9.5 BEREC

In accordance with the provisions of Art.194 Par.2 TKG 2021, the regulatory authorities are to actively support BEREC's aims in connection with improving regulatory coordination and enhancing coherence. As the authority also responsible for TKG enforcement, KommAustria naturally fulfils this duty, working with the TKK and RTR's Telecommunications and Postal Services Division to coordinate matters falling into its remit and consulting in advance with the TKK and RTR as required. Even though KommAustria does not usually participate in BEREC meetings directly, prior agreement is nonetheless established on issues of relevance for KommAustria. KommAustria is also kept up to date on recent developments at BEREC, being represented by the RTR's Media Division at regular informational meetings to report on proceedings at BEREC sessions.

## 2.9.6 ITU

In 2025, Working Party 6A of ITU-R Study Group (SG) 6 once again reviewed numerous draft revisions of broadcasting standards applicable to the frequency planning of digital terrestrial broadcasting systems. Some of these standards have now been adopted, such as the latest report on field trials for terrestrial mobile multimedia systems, including the 5G broadcast system developed in Europe.

The new emergency warning system for the DAB+ standard, now rebranded as the Automatic Safety Alert (ASA), was incorporated into ITU-R Recommendation BS.1114 as an annex to the system description of the DAB+ broadcasting system.

The subgroup also answered queries addressed to the CISPR and CENELG standardisation bodies, who wished to know how the broadcasting service could be adequately protected against potential interference from other radio services and EMC interference from electronic devices.

Several African countries, including Ghana, South Africa, Tanzania and Tunisia, also reported on successful initial field trials for digital radio services using the European DAB+ and DRM standards.

## 2.9.7 RSPG

### 2.9.7.1 Subgroup for assessing the future usage of the 470–694 MHz frequency band within the EU

The RSPG subgroup, which was established in 2024, once again held several sessions in the reporting year, and prepared a report on potential future usage scenarios for the 470 to 694 MHz frequency band—currently used for terrestrial television—in the European Union after 2030.

The report, to which RFFM staff also contributed, was finalised and published at the end of 2025, following the completion of a public consultation on the draft report.

Further activities on this topic will follow in the next few years, focusing especially on the question of whether other terrestrial television frequencies in the 470 to 694 MHz range should be allocated for use by mobile services in Europe.

### 2.9.7.2 'Good Offices' subgroup

This subgroup provides Member States with assistance on cross-border coordination difficulties or with harmful interference from another EU country or third country. This subgroup held a number of online sessions in the reporting year that were attended by RFFM staff.

### 2.9.8 TIB-G

As the competent TCO authority, KommAustria contributed significantly to the work of a subgroup whose goal was to develop a taxonomy for terrorist online content and which met a total of four times in the reporting year. The authority also participated actively in a multi-stakeholder dialogue initiated by the European Commission, which also saw the involvement of all European TCO authorities as well as other relevant actors in the field.

## 2.10 Grants

The federal subsidies for the press, publishing and quality journalism are direct support measures in the form of financial contributions. Decisions on the allocation of subsidies are made by KommAustria, although one member of the authority is usually designated for the administration of subsidies in these areas. The Press Subsidies Commission, the Journalism Subsidies Advisory Board and the Advisory Board for the Promotion of Quality Journalism have been set up as bodies to advise on these matters.

The legal bases for the allocation of grants are the Press Subsidies Act (PresseFG) 2004, the press subsidies guidelines published annually by KommAustria, Section II of the Press Subsidies Act (PubFG), the Act on the Promotion of Quality Journalism (QJF-G) and the promotion of quality journalism guidelines also published annually by KommAustria. The funding of the self-regulating body in print and online is also governed by the QJF-G (Art. 14 QJF-G).

The promotion of self-regulation in the area of commercial communication (Art. 32a and 33 KommAustria Act, KOG) and self-regulation for the protection of minors (Art. 32a and 32b KOG) also fall within KommAustria's scope of responsibility. No provision has been made for an advisory body to promote these self-regulation bodies. The legal bases for the allocation of grants are the aforementioned statutory provisions and the respective funding guidelines published by KommAustria.

### 2.10.1 Press subsidies

Press subsidies provide daily and weekly newspapers in Austria with financial support in the interests of promoting a diverse local press landscape. Publishers of daily and weekly newspapers are the target group for the subsidies under the PresseFG 2004. Since 2024, press subsidy disbursements have covered distribution subsidies (for dailies and weeklies) and the special subsidy for daily newspapers.

In 2025, KommAustria received 42 applications for subsidies in accordance with the PresseFG 2004. KommAustria allocated funding in each and every case.

**Table 12: Press subsidies—grant amounts, applications and approval rates, 2021–2025**

Year	Grant amount (EUR) <sup>1</sup>	Requests	Approvals	Approval rate in %
2021	8,881,000.00	108	104	96.30
2022	8,860,000.00	101	99	98.02
2023	8,904,260.00	102	98	96.08
2024	7,127,000.00	44	43	97.73
2025	7,127,000.00	42	42	100

The following amounts and applications were allotted to the individual funding areas in the 2025 funding year:

**Table 13: Press subsidies—amounts per funding area for 2025**

Total press subsidies in 2025	Funding Euros	Requests	Granted
Distribution subsidies under Section II PresseFG (dailies)	2,097,900.00	10	10
Distribution subsidies under Section II PresseFG (weeklies)	1,787,100.00	29	29
Special subsidies under Section III PresseFG	3,242,000.00	3	3
<b>Total</b>	<b>7,127,000.00</b>	<b>42</b>	<b>42</b>

Full details of subsidy activities are published on the website [www.rtr.at](http://www.rtr.at).

## 2.10.2 Promotion of quality journalism

The first grants to promote quality journalism were disbursed by KommAustria in 2024 for the 2022 and 2023 observation periods. The promotion of quality journalism legislation provides financial aid to daily and weekly newspapers, magazines and online media to fulfil two key aims. First, to promote the diversity of text-based news media as a basis for public discourse and diversity of opinion. Second and importantly, to support professional journalists who in creating quality editorial content adhere to recognised journalistic principles and exercise the necessary diligence to verify facts and the authenticity of sources. Alongside promoting journalism and content diversity, the QJF-G also provides for the promotion of basic and advanced training, media literacy, as well as the promotion of self-regulation, press clubs and media research projects.

The intended recipients of QJF-G grants include: owners of daily and weekly newspapers, magazines and online media, institutions providing basic and advanced training for journalists, press clubs, research and educational institutions (media research projects), educational institutions for media (promotion of media literacy), and self-regulation bodies for print and online media.

<sup>1</sup> This list takes into account the “Promotion of quality and securing the future” governed by Section IV of the PresseFG 2004 until 2023, and the subsidy for the Press Council, also governed until that year by the PresseFG 2004. Since 2024, both now fall under quality journalism funding, which provides for some changes and a larger budget. This accounts for the drop in grant applications as well as total press subsidies disbursed.

A total of EUR 20,042,500 is made available within each observation period. Funding decisions are made by KommAustria after a meeting of the advisory board.

**Table 14: Press subsidies—grant amounts, applications and approval rates, 2022–2024**

Observation period	Grant amount (EUR)	Requests	Approvals	Approval rate in %
2022	20,029,401.40 <sup>2</sup>	213	172	80.75
2023	20,042,858.60	215	177	82.33
2024	19,998,500.00 <sup>3</sup>	203	199	98.03

The following amounts and applications were allotted to the individual funding areas in the 2025 funding year for the 2024 observation period:

**Table 15: Promotion of quality journalism—amounts per funding area in 2025**

Promotion of quality journalism 2025 (2024 observation period)	Funding EUR	Requests	Granted
Promotion of journalism (Art. 6 QJF-G) <sup>4</sup>	15,331,717.91	77	75
Promotion of content diversity (Art. 7 and 8 QJF-G) <sup>5</sup>	2,500,000.00	72	71
Educational institutions (Art. 9 QJF-G)	900,000.00	9	8
Career-integrated basic and advanced training (Art. 10 QJF-G)	17,855.45	5	5
Basic training of young journalists (Art. 11 QJF-G)	251,115.00	6	6
Institutions for media literacy (Art. 12 QJF-G)	349,312.21	2	2
Free subscriptions for schools (Art. 13 QJF-G)	349,999.43	24	24
Press clubs (Art. 15 QJF-G)	62,500.00	6	6
Media research (Art. 16 QJF-G)	50,000.00	1	1
<b>Subtotal</b>	<b>19,812,500.00</b>	<b>202</b>	<b>198</b>
Self-regulation bodies for print and online media (Art. 14 QJF-G) <sup>6</sup>	186,000.00	1	1
<b>Grant amount disbursed</b>	<b>19,998,500.00</b>	<b>203</b>	<b>199</b>

Full details of subsidy activities are published on the website [www.rtr.at](http://www.rtr.at).

- 2 One former grant recipient did not fulfil the new QJF-G subsidy criteria during the transition period. The grant of EUR 358.60 to fund free subscriptions for schools was therefore withheld in the 2022 observation period and later disbursed in the 2023 period. The figure is not the full EUR 20,042,500.00 because the Press Council did not claim all of the new maximum grant provided for by the QJF-G. The difference then had to be allocated to an earmarked reserve as specified in Art. 14 Par. 2 of the QJF-G.
- 3 The gap between this sum and the EUR 20,042,500 provided for by the QJF-G results from the self-regulatory body in the print and online sector (Art. 14 QJF-G) not fully utilising available funds. EUR 44,000.00 was paid into an earmarked reserve.
- 4 Including the new grants for foreign correspondents, as well as additional grants for media owners who have adopted an editorial code pursuant to Art. 5 of the Media Act (MedienG), who operate an error management system, who have established a quality assurance system, or who have and apply verified company programmes to promote women in journalism.
- 5 A total of EUR 2,036,519.65 was awarded to regional reporting pursuant to Art. 7 QJF-G (with 62 requests and 61 approvals) and a total of EUR 463,480.35 to EU reporting pursuant to Art. 8 QJF-G (with 10 requests and 10 approvals).
- 6 A total of EUR 230,000.00 is available annually pursuant to Art. 14 QJF-G, with EUR 186,000.00 applied for. The remaining EUR 44,000.00 was transferred to an earmarked reserve.

### 2.10.3 Journalism subsidies—promotion of print periodicals

Section II of the PubFG provides for the promotion of periodicals that serve the purpose of educating citizens by contributing high-quality analysis of relevant issues stemming from the spheres of policymaking, culture and world views. Taken as a whole, the periodicals that receive funding represent a broad spectrum of content. The publications range from feminist periodicals to journals that are centred on religious topics or discuss political and scientific issues. Also included are periodicals by associations that are active in the fields mentioned above and are familiar with the topics through practical experience.

In 2025, KommAustria received 57 applications for funding of a print periodical in accordance with Section II PubFG, complying with 54 requests while rejecting three due to failure to meet statutory funding requirements.

KommAustria decides the level of funding on a case-by-case basis, giving due consideration to recommendations made by the Journalism Subsidies Advisory Board as well as to the scope, circulation, resources and financial situation of the relevant print periodical. By law, grants may be no less than 0.4% and no more than 4% of the funds designated for this purpose in the Federal Finance Act (BFG).

As in previous years, EUR 340,000 was available for journalism subsidies in 2025. The subsidy amounts ranged from EUR 1,360 to EUR 13,600.

**Table 16: Journalism subsidies—grant amounts, applications and approval rates, 2021–2025**

Year	Grant amount (EUR)	Requests	Approvals	Approval rate in %
2021	340,000.00	75	73	97.3
2022	340,000.00	70	69	98.6
2023	340,000.00	66	64	96.97
2024	340,000.00	61	58	95.08
2025	340,000.00	57	54	94.74

Full details of subsidy activities are published on the website [www.rtr.at](http://www.rtr.at).

### 2.10.4 Promotion of self-regulation bodies for print and online media

Since 2024, the promotion of self-regulation bodies in the print and online sector has been managed as part of the promotion of quality journalism. This approach aims to ensure the independence of the body in question, to ensure that it carries out the duties set forth in its articles of association, and to help it effectively enforce its decisions and resolutions. Annual funding of EUR 230,000 is available, together with earmarked reserves and interest.

In 2025, the Austrian Press Council was the sole subsidy applicant and requested a cost contribution of EUR 186,000. KommAustria complied with this request to the full amount. The unallocated funds of EUR 44,000 for the 2025 funding year were paid into an earmarked reserve.

The Austrian Press Council processed 503 cases in total in 2025. A total of 499 cases were submitted to the Press Council from outside parties, while in the other cases the body took action based on its own monitoring activities. Numerous complaints were received concerning the Graz school shooting, with other notable topics being the reporting on femicides and Niki Glattauer's assisted suicide, and a pieced-together 'interview' with Clint Eastwood.

Of Austria's dailies, only Kronen Zeitung has yet to recognise the Press Council's arbitrator status.

**Table 17: Press Council—number of cases handled and cost contributions, 2021–2025<sup>7</sup>**

Year	Cases	Cost contribution (EUR)
2021	647	194,000.00
2022	435	173,000.00
2023	407	217,260.00
2024	425	230,000.00
2025	503	186,000.00

## 2.10.5 Funding for self-regulation of commercial communication

The Fund for the Promotion of Self-Regulation in Commercial Communication has been allocated EUR 75,000 each year since 2021. Pursuant to Art 33 KOG, this amount can be granted to a recognised self-regulatory body in the field of media commercial communication. After the addition of interest and the deduction of bank fees, funding totalling EUR 75,129.25 was available in 2025.

The objectives of this kind of financial support, originally introduced in 2009, are to ensure the independence of the body in question, to ensure that the body carries out the duties set forth in its articles of association, and to help effectively enforce its decisions and resolutions.

As the sole applicant, the Österreichische Gesellschaft zur Selbstkontrolle der Werbewirtschaft – Österreichischer Werberat (Austrian Advertising Council) received EUR 75,000 in 2025.

In 2025, a total of 437 complaints were submitted to the Austrian Advertising Council and 292 decisions were handed down in 2024. 'Ethics and Morals' and gender-discriminatory advertising were the categories that received the largest volume of complaints.

**Table 18: Press Council—number of cases handled and cost contributions, 2021–2025**

Year	Cases	Cost contribution (EUR)
2021	413	75,000
2022	503	75,000
2023	334	75,000
2024	372	74,860
2025	437	75,000

<sup>7</sup> Disbursed under press subsidies until 2023; disbursed under the promotion of quality journalism from 2024.

## 2.10.6 Promotion of self-regulation for the protection of minors

The fund for the promotion of self-regulation for the protection of minors is managed by KommAustria and endowed with an annual sum of EUR 75,000. This amount can be granted to a representative self-regulatory body for the protection of minors pursuant to Art. 32b KOG, to ensure the independence of the body in question, to ensure that the body carries out the duties set forth in its articles of association, and to help effectively enforce its decisions and resolutions.

Funding requests can be made twice a year (first submission deadline 31 August in the funding year, second submission deadline 31 March in the following year).

The only applicant to date has been the Association for the Protection of Minors through Self-Regulation of Audiovisual Media Products and Services ("Verein zur Selbstkontrolle audiovisueller Medienangebote zum Schutz von Minderjährigen", abbreviated Jugendmedienschutzverein), formed in June 2021. In 2025, a total of EUR 40,505.43 from the second application period in 2024 was approved and disbursed to the Jugendmedienschutzverein, while the sum of EUR 34,751.64 from the first application period in 2025 was likewise approved and disbursed. The second submission deadline for the 2025 funding period is in March 2026.

Four formal complaints were submitted to the self-regulatory body in 2025 in response to a breach of the conduct guidelines. Alongside activities related to prevention, the association attended stakeholder meetings in 2025 and succeeded in increasing the number of youth protection declarations from media service providers opting into voluntary self-regulation.

**Table 19: Jugendmedienschutzverein – number of cases handled and cost contributions, 2021–2025**

Year	Cases	Cost contribution in euros (disbursed in funding year)	Submission deadlines / funding period
2021	0	35,971.32	2021 submission deadline
2022	2	13,054.59	2022 submission deadline 1
2023	6	47,742.94	2022 submission deadline 2
2024	4	62,888.84 31,720.59	2023 submission deadline 2024 submission deadline 1
2025	4	40,505.43 34,751.64	2024 submission deadline 2 2025 submission deadline 1





KommAustria  
reports

# 03 KommAustria reports

## 3.1 Requirements for the protection of minors and subsequent implementation

### 3.1.1 General information: legal framework for self-regulation

The self-regulatory system for the protection of minors from audiovisual content that may impair minors' development was introduced on the basis of Directive (EU) 2018/1808 of the European Parliament and of the Council of 14 November 2018 amending Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive, AVMSD).

The Austrian legislative framework was amended (Federal Law Gazette I No. 150/2020) to incorporate these EU provisions. Obligations imposed on audiovisual media service providers include the requirement to draw up and follow guidelines for presenting viewers with sufficient information for assessing the potential harm posed to minors by content. Such guidelines must describe the nature of the content that could impair the physical, mental or moral development of minors, using language easily understood by users. Legislation has also been passed that aims at uniform national conduct guidelines, by requiring media service providers to support and contribute to initiatives to establish and improve the efficiency of self-regulation; cf. Art. 39 of the Audiovisual Media Services Act (AMD-G) and Art. 10a of the ORF Act (ORF-G).

At the same time, regulations governing the requirements for self-regulatory bodies have been set out, while funding for a youth protection self-regulatory body is to be provided by KommAustria (cf. Art. 32a and Art. 32b of the KommAustria Act (KOG)). KommAustria has prepared and published guidelines for awarding grants out of the Fund for the Promotion of Self-Regulation in Commercial Communication.

Thus, responsibility for implementation of an industry-wide youth protection system based on the aims of the amended AVMSD, as well as for verification of compliance with the system, has been delegated in part to a self-regulatory body.

Art. 32a KOG provides for the following prerequisites for recognising a self-regulatory body:

#### ***"Self-regulatory bodies***

*Art. 32a. (1) The activities of recognised self-regulatory bodies may be granted funding in order to help achieve the goal of ensuring compliance with minimum European standards on the part of content providers.*

*(2) A recognised self-regulatory body is defined as a body with legal personality that:*

- 1. guarantees a broad representation of the providers concerned, and comprehensive transparency in respect of decision-making criteria, procedures and the enforcement of decisions;*
- 2. defines conduct guidelines and rules of procedure that are generally recognised by the primary stakeholders and which clearly define the goals of self-regulation;*
- 3. ensures the periodic and transparent monitoring and assessment of the fulfilment of these goals, exclusively by an external and independent entity;*
- 4. ensures that complaints are effectively handled and that its decisions are enforced, including the imposition of effective and proportionate sanctions in the event of breaches of the conduct guidelines;*
- 5. prepares a report concerning its activities, its established goals, and the measures and decisions taken in accordance with No. 3 and 4, and publishes this report in a suitable format.*

(3) Sanctions within the meaning of Par. 2 No. 4 include in particular:

1. the publication of a decision by the self-regulatory body;
2. the publication of a recommendation for future conduct by the self-regulatory body;
3. the revocation of a quality seal or positive designation granted in accordance with the body's guidelines;
4. potential identification of a breach or warnings in accordance with the body's legal framework.

(4) Every four years, the self-regulatory body shall provide the regulatory authority with a report on the body's structure and working practice that illustrates its contribution to the goal of achieving compliance with minimum standards on the part of content providers."

The effectiveness of this self-regulatory system is subject to a subsequent audit by KommAustria, following completion of various reporting duties (activity report pursuant to Art. 32a Par. 2 No. 5 KOG; effectiveness report pursuant to Art. 32b Par. 4 KOG; and report on structure and working practice, due every four years under Art. 32a Par. 4 KOG). In the activity report, KommAustria is to present its assessment of effectiveness as well as appropriate recommendations (Art. 19 KOG).

The framework governing both the organisation and the specific activities of the self-regulatory body for youth media protection in audiovisual media (TV and on-demand services) was set out when the body was established in 2021. This framework was implemented by the Association for the Protection of Minors through Self-Regulation of Audiovisual Media Products and Services, which has worked with the industry to develop uniform guidance on conduct and procedure, and also set up a complaints system.

In early 2026, the association published its activity report and effectiveness report for 2025, together with the report on its structure and working practice. Issued every four years, the latter report describes the association's efforts towards securing compliance with minimum standards.

### **3.1.2 Association for the Protection of Minors through Self-Regulation of Audiovisual Media Products and Services**

Formed on 17 June 2021, the Association for the Protection of Minors through Self-Regulation of Audiovisual Media Products and Services (hereinafter: association) is entered in the Central Register of Associations under ZVR number 1686796152, and is based in Vienna.

In accordance with its articles of association, the association's primary objective is to ensure effective self-regulation so as to protect minors from content in audiovisual media services that could impair their physical, psychological or moral development and which falls within the remit of the Austrian regulatory authorities under applicable legal provisions.

In pursuit of this overarching goal, in accordance with provisions of law and its articles of association, the association acts as follows:

- Establishment of a legal entity that meets the requirements for a self-regulatory body as defined by Art. 32a KOG, first and foremost by ensuring a broad representation of media service providers who have committed to the protection of minors.
- Drafting and adoption of conduct guidelines and rules of procedure that are generally recognised by the primary stakeholders—and therefore the providers of audiovisual media services who have committed to the protection of minors—and which unambiguously define the goals of self-regulation.
- Ensuring the proper treatment of complaints and the enforcement of decisions, including the imposition of sanctions in the case of breaches of the conduct guidelines, by establishing an administrative office for handling complaints and by appointing an independent experts council to decide on such complaints.
- Guaranteeing full transparency in respect of decision-making criteria, procedures and the enforcement of decisions.
- Reporting fully on activities and the effectiveness of the measures taken, in accordance with legal requirements.
- Communicating with authorities, ministries and other state and non-state actors, as well as with international associations or organisations pursuing similar goals.

The Association for Telecommunications and Broadcasting Companies within the Austrian Federal Economic Chamber, the ORF and the Association of Austrian Commercial Broadcasters (VÖP) have been ordinary members since its formation.

Other members—both ordinary and extraordinary—may be admitted on the terms of the association's constitution. The association presents its articles on its website ([www.jugendmedienschutz.at](http://www.jugendmedienschutz.at)).

The articles of association assign leadership responsibilities to a management board. The board is tasked with managing the association's business and organisational operations as well as reporting duties, in particular the preparation of and the formal decision to adopt the conduct guidelines and rules of procedure as required by Art. 39 AMD-G. The board also handles the establishment of and appointments to the experts council as a complaints body, as well as the handling of objections to decisions that impose sanctions on media service providers as a result of breaches of the conduct guidelines.

The management board is made up of Helga Tieben (chair), Corinna Drumm (treasurer) and Daniela Nemecek (secretary).

Alice Krieger-Schromm was appointed head of the administrative office in 2021.

In line with the association's rules of procedure, the experts council (cf. Article 14(2) of the articles of association) makes decisions on such complaints as may be filed as a result of alleged breaches of the conduct guidelines on the part of media service providers. The following individuals have been appointed members of the experts council:

- Pia Bambuch, ProSiebenSat.1 PULS 4 GmbH, director of legal and regulatory affairs
- Frank Holderied, ServusTV, head of programming, purchasing and in-house fiction content productions
- Claudia Horvath-Polak, ORF, film and series youth protection/member of the Youth Media Commission
- Andreas Ney, Austrian Federal Economic Chamber/Association for Telecoms/Broadcasting, deputy managing director
- Lisa Zuckerstätter, ORF, access services—youth protection officer

### 3.1.3 Conduct guidelines

The conduct guidelines as of August 2021 can be viewed on the association's website ([www.jugendmedienschutz.at/verhaltensrichtlinien/](http://www.jugendmedienschutz.at/verhaltensrichtlinien/)).

In accordance with the provisions of EU law and Austrian legislation, the conduct guidelines aims to establish an effective and uniform nationwide system for the protection of minors from content in audiovisual services (broadcasting and on-demand services) that has the potential to impair their development. This system should be easily understood by viewers—especially by minors and their legal guardians—and should be recognised and implemented by as many providers as possible.

The guidelines specify (minimum) requirements for the protection of minors in the context of audiovisual services. In cases where providers wish to offer a higher level of protection on a voluntary basis, the guidelines make recommendations for ensuring such initiatives are as uniform as possible.

Content potentially impairing the development of minors must be offered by providers in such a way as to prevent it from being generally viewable or consumable by minors. As part of meeting this requirement, television broadcasters must choose appropriate broadcasting times. Providers of on-demand services must use suitable measures to achieve a level of protection comparable to that offered by broadcasting time slots, either by also restricting the daily accessibility of content potentially impairing development, or through other appropriate measures.

Certain content potentially impairing development is not prohibited by law but is to be classified as particularly harmful, such as the casual depiction of sexual acts (hardcore pornography and other pornographic material that does not meet the criteria for being considered content prohibited by law). Such content may be provided only if measures such as age verification systems or comparable access control measures are in place to ensure that minors are not generally able to use it. News broadcasts and party political broadcasts are exempted from these obligations.

If broadcasts that should typically not be viewed by minors are made freely accessible by television broadcasters during broadcasting times that are less suitable for scheduling such broadcasts from a youth protection perspective, such broadcasts must be identified accordingly (announcement by means of an acoustic signal or the application of a visual identifier throughout the entire broadcast; the ORF must comply with stricter standards that require identification with acoustic signals and visual identifiers throughout the entire broadcast).

In addition to the identification requirement, all media service providers are also required to present viewers with sufficient information for assessing the potential harm posed to minors by the content. Media service providers must describe the nature of the potentially harmful content using references that are easily understood by viewers. Details of these new duties to present information ('information system') are given in the conduct guidelines.

To ensure that programme content potentially impairing development cannot generally be viewed by the minors who are to be protected, television broadcasters undertake to comply with the following broadcasting time slots (depending on the age classification of the programme in question):

- Daytime television, 6 am to 8 pm: Content in programmes broadcast during the day must be suitable for (young and older) children. Accordingly, all programmes broadcast must have content suitable for children in the 12 and under range or, in isolated cases (and if this does not impair the well-being of younger minors), 12 and over (but not 16 and over). All daytime programmes with an age classification of 12 and over must comply with labelling requirements.
- Evening television, 8 to 10 pm: During the evening television slot, programmes are broadcast that fall under the 12 and over category or a lower category or, in isolated cases (and if this does not impair the well-being of younger minors), the 16 and over (but not 18 and over) category. All programmes with an age classification of 16 and over must comply with labelling requirements.

- Late evening television, 10 to 11 pm: During the late evening television slot, programmes are broadcast that fall under the 16 and over category (with labelling) or a lower category.
- Night-time television, 11 pm to 6 am: Programmes falling under any age category can be broadcast during the night-time slot. All programmes falling under the 16 and over or 18 and over age category must comply with labelling requirements.

The self-regulatory body has stated that the guidelines are modelled (and expand) on accepted practice in youth protection in the industry to date, especially as regards questions of selecting broadcasting times or time slots in which content potentially causing harm should be shown or made available, and established practice regarding acoustic and/or visual labelling.

The conduct guidelines also recommend the voluntary provision of additional information (supplementing the recommended age classification and notes on the potential harm) on the part of television broadcasters, which is to be included in information sources accompanying their programming such as EPGs, teletext or specialised online services. However, broadcasters are not required to present such information.

### 3.1.3.1 Rules for television programming

As mentioned above, the information system for television broadcasters pursues the goal of presenting viewers—and parents and minors in particular—with sufficient information, in a simple and easily comprehensible format, that allows them to assess the potential harm posed to minors by content.

Specifically, the submitted conduct guidelines require television broadcasters who broadcast freely accessible programmes outside the recommended broadcasting time slots—thus potentially impairing the development of minors—to offer at the start of the programme simple and easily understood references to the recommended age classification (age reference) and the nature of the potential harm posed by the programme that follows (harm reference or label).

The age references use the international age limits (which have also been applied in Austria for many years) and are oriented towards the classifications from the FSK (voluntary film industry self-regulatory body) and the FSF (voluntary television industry self-regulatory body). Five separate age categories are defined:

- Content is not suitable for minors: 18 and over
- Content is suitable for minors of at least age 16: 16 and over
- Content is suitable for minors of at least age 12: 12 and over
- Content is suitable for children/minors of at least age 6: 6 and over
- Content is suitable for children/minors of any age: 0 (no restrictions)

A classification system provides objective definitions of the type of content considered unsuitable for the individual age categories, since this content has the potential to impair the development of children and minors.

According to the conduct guidelines, content potentially impairing development is further subdivided into the four harm categories of 'violence', 'anxiety', 'inappropriate behaviour' and 'sex'. Harm guidance must further be presented so that, at the start of the programme and as an adjunct to the age warning, at least one of these harm categories is specifically indicated using a visual overlay with a text identifier ('violence', 'anxiety', 'inappropriate behaviour' and/or 'sex').

Before the start of each programme subject to a labelling requirement, the age and harm reference are shown in easily legible lettering of an appropriate size along the top edge of the screen for at least three seconds.

In line with the conduct guidelines, broadcasters are free to supplement the harm reference with more detailed descriptions of the potential harm, but must ensure that these details do not compromise the easy comprehensibility of the reference. It is recommended that broadcasters include easily accessible age/harm references in the information sources that accompany their programming (such as the EPG, teletext or website).

To ensure that the youth media protection system in Austria is as uniform as possible, a set of assessment standards is required. Accordingly, the conduct guidelines define uniform standards and assessment criteria for each age category. These assessment standards and criteria have been developed while taking the greatest possible account of established assessment criteria recommended by recognised youth protection bodies.

### 3.1.3.2 Rules for on-demand services

As is the case for television broadcasters, providers of on-demand services must also ensure that programmes potentially impairing the physical, psychological or moral development of minors are provided in a way that prevents them being generally viewable or consumable by minors.

Like television broadcasters, providers of on-demand services must also set up an appropriate information system that allows their users to make informed decisions about the content to be viewed. In line with the conduct guidelines, the age classification system and assessment standards apply *mutatis mutandis* to on-demand services.

The conduct guidelines states that on-demand services may provide the required level of protection for minors by deploying an effective control system secured by access codes. If a control system based on time of access (effectively modelled on the broadcasting time slots used in television) is used, then service providers must use age references and programme-specific harm labelling to designate programmes subject to labelling requirements (based on age category and access time). Additional information provided in support of programming is also recommended but is not mandatory.

## 3.1.4 Youth protection at the ORF

Pursuant to Art. 10a ORF-G, the ORF summarised the youth protection activities in ORF media services as part of its 2025 annual report.

In this report, the ORF as a public media company underlined the fact that youth protection has from the outset been a priority concern. In the ORF's television, radio and online services, youth protection can be ensured by means of high-quality programme work, responsibly minded programming and active self-regulation on the part of programme producers.

The ORF does not view its youth protection duties as limited to merely labelling broadcasts to comply with European regulations. The broadcaster has correspondingly adopted a wide range of voluntary guidelines and codes aimed at protecting minors.

### 3.1.4.1 Youth protection in ORF television

In its approach to the handling of broadcasts that are less suitable for viewing by children and adolescents, the ORF builds on existing, voluntary guidelines, while complying with additional measures derived from applicable law.

Throughout its programming, the ORF utilises opportunities to protect minors, with the aim of avoiding any impairment to their physical, mental or moral development. Such opportunities arise during programme acquisition, production and editing, in the exercising of due care in the design and placement of programme trailers, in scheduling that properly accounts for time slots, and in terms of the labelling and information provided to viewers.

Each broadcast is checked by the responsible editorial team at the production and/or acquisition stage. When determining the suitability of a specific programme for a specific age category, the ORF may base such decisions on the recommendations of the Austrian Youth Media Commission (JMK) at the Federal Ministry of Education, Science and Research, and on age classifications used by the German FSK (voluntary film industry self-regulatory body) and German FSF (voluntary television industry self-regulatory body). Cooperation with the JMK is a key aspect of the support provided to editorial decision-making. Since 2002, the ORF has used the option of submitting programmes to a review committee to obtain a recommended classification.

In accordance with legal provisions and the conduct guidelines from the above-mentioned association, the ORF has adopted the following youth protection measures.

#### **Scheduling by broadcasting time slots**

For many years ORF has been ensuring that programme content potentially impairing development is scheduled to comply with strict time slots that are coordinated to the developmental stages of minors.

All programmes broadcast before 8 p.m. normally must have content suitable for children in the 12 and under range or, in isolated cases (and if this does not impair the well-being of younger minors), 12 and over (but not 16 and over).

After 8 p.m., the ORF considers parents and legal guardians to share responsibility for the viewing habits of their young and adolescent children. During the evening television slot (8 to 10 pm), programmes with a higher age classification (12+ and 16+) may be broadcast but not programmes falling under the 18 and above category.

Programmes falling under the 18+ age category may be broadcast only during the night-time slot (11 pm to 6 am).

#### **Labelling of television programmes with fiction content**

As a complement to responsible programming, the ORF has provided programme labelling for the protection of children and adolescents since 1 January 1999.

In linear television, programmes falling under the 16+ or 18+ age category are always labelled as such regardless of their broadcast time. Programmes falling under the age category of 12+ are labelled as such only during daytime television (6 am to 8 pm).

At the start of labelled programmes broadcast after 10 pm—this applies in most cases to feature films and series—the age reference is supplemented by an acoustic signal and a reference to the nature of the harm involved. This guidance and/or descriptors may signify 'violence,' 'horror,' 'inappropriate behaviour' or 'sex.' The information is shown for three seconds at the top edge of the screen.

### **3.1.4.2 Youth protection in ORF online services and ORF TELETEXT**

As with all other channels operated by the ORF, the design and execution of all programming on ORF.at is subject to legally mandated and voluntarily adopted guidelines and codes. The ORF's online services are reviewed on a rolling basis to exclude any content harmful to minors.

Any pages these services link to are also subject to a thorough review. These review processes prioritise the content on ORF.at that is aimed at children and adolescents. Forums are also subject to youth protection guidelines and codes, with compliance being the responsibility of the forum administration team.

Programmes falling under the 12+, 16+ or 18+ age category are labelled accordingly in ORF ON and tv.ORF.at as well as in ORF TELETEXT (regardless of their actual TV broadcasting time slot). ORF ON and tv.ORF.at also use a descriptor ('violence', 'horror', 'inappropriate behaviour' or 'sex') to indicate the nature of the harmful content.

The ORF has also adopted the measures as listed below on ORF ON. By agreement with the competent main ORF departments, certain series or productions are made available as video-on-demand items on ORF ON only between 8 pm and 6 am or 10 pm and 6 am. These restrictions do not apply to users with an age-verified personal account, however, as they can log in and access these broadcasts at any time.

Users of ORF ON are informed appropriately about these restricted viewing times when they click to select the corresponding programme. In addition to these arrangements, no advertising is permitted during children's programming.

The editorial content offered by the ORF TELETEXT service is likewise prepared in strict accordance with the ORF Act and the relevant provisions from this law that address youth protection. Materials provided by business partners and advertising customers must also comply in full with legal requirements and be monitored to confirm the absence of harmful content.

### 3.1.5 Rules of procedure

The conduct guidelines, formally designated the association's 'rules of procedure', defines the process for handling complaints and the adoption of decisions on complaints by the experts council. The conduct guidelines also address the possibility of objecting to the council's decisions, the enforcement of such decisions and the imposition of appropriate sanctions on media service providers. The rules of procedure can be accessed from the association's website (see [www.jugendmedienschutz.at](http://www.jugendmedienschutz.at)).

The self-regulatory body publishes an annual activity report that informs the general public about a number of topics, including the measures and decisions adopted by the body in the reporting year, as well as the sanctions imposed as a result of breaches of the conduct guidelines. See [section 3.1.7.2](#) for a report on complaints received by the association in 2025.

### 3.1.6 Recognition of the conduct guidelines and rules of procedure

The provisions of Austrian youth protection legislation require the widest possible acceptance of the conduct guidelines and rules of procedure (cf. Art. 32a KOG). To achieve this level of acceptance, industry representatives were closely involved in the drafting process for these rules.

Beyond the practical involvement of industry representatives, formal recognition (in the form of a documented proof of recognition) of the conduct guidelines and rules of procedure was also required. With reference to their individual obligation as broadcasters or on-demand service providers to create and comply with specific conduct guidelines (cf. Art. 39 Par. 4 AMD-G), media service providers were advised to fulfil their legal duties by publishing a youth protection declaration on their website, in which they formally recognise and agree to be bound by the conduct guidelines and the rules of procedure set out by the self-regulatory body.

According to the association's reports for 2025, a large part of the work focused on extending acceptance of the conduct and procedural guidelines among the industry and supporting implementation of these in practice.

In 2025, efforts to obtain more youth protection declarations from industry representatives continued, with the aim of improving the industry's acceptance of the association. Following written and telephone contacts, acceptance has considerably increased, so that as of 31 December 2025 107 television broadcasters and 104 on-demand service providers had notified the association of their acceptance of the conduct guidelines and rules of procedure (compared with 94 broadcasters and 91 on-demand service providers at the end of 2024).

The individual providers are listed in the activity report published by the association (in German; available at [www.jugendmedienschutz.at/organisation](http://www.jugendmedienschutz.at/organisation)).

In 2025, the administrative office also started work on revising the list of those Austrian audiovisual media services whose signed youth protection declarations have already been accepted and recognised by the association. This process, which will continue into the 2026 reporting year, has focused on confirming the existence of the respective media service as well as the currency, completeness and public availability of the youth protection declaration.

## 3.1.7 2025 reports

### 3.1.7.1 Effectiveness report

Pursuant to Art. 32b Par. 4 KOG, the self-regulatory body for the protection of minors is to submit an annual report addressing the effectiveness of conduct guidelines provisions, as well as the type, number and outcome of complaints, to KommAustria by 31 March of the following year.

According to the report, the following effectiveness criteria are specified pursuant to Art. 32a Par. 2 KOG:

- Conduct guidelines have been drafted that unequivocally define the objectives of self-regulation in youth protection for media services.
- The conduct guidelines have been recognised by the primary stakeholders.
- The conduct guidelines have been implemented and observed.

The association's formation, the drafting of the conduct guidelines, their provisions and progress towards their recognition by the primary stakeholders are presented above.

The following measures for auditing conduct guideline implementation and compliance were set out in 2025:

In 2025, the association conducted an effectiveness audit of participating media services that examined two key criteria. First, whether these media services had submitted a full, signed youth protection declaration to the administrative office; and second, whether this declaration and/or the recognised conduct guidelines had been published on the service's website, including a link to the youth protection guidelines.

Auditing was carried out consistently throughout 2025. The media services were informed of any compliance weaknesses and instructed correspondingly. At the end of 2025, a final analysis revealed a 'pass rate' of almost 100%: of 107 television broadcasters and 104 on-demand service providers, almost all participants completed the effectiveness audit successfully. All of the others have submitted a youth protection declaration but had not, for example, signed it or published it online.

In the course of 2025, the administrative office reviewed the content of participating media service providers for compliance with youth protection standards. This review, which was conducted by examining a random sample of films and programmes, aimed to establish whether labelling (announcement by means of an acoustic signal or the application of a visual identifier throughout the entire broadcast) and information (age rating and harm guidance) had been provided as required.

The review focused on a large number of smaller media service providers. In cases where the review process identified irregularities—an absence of proper labelling or inadequate guidance, for example—the media services concerned were promptly informed of the issues in question. This approach helped to foster constructive cooperation between the association and the media services.

Looking at the results of the effectiveness audit on the one hand and the youth protection compliance audits of media services on the other, the association found that the major providers and many smaller providers alike had acted to ensure adequate implementation of the conduct guidelines and the information system in particular, including age and harm references, by the end of 2025. No major instances of non-conformity were identified. In the event of minor non-conformities, the media service was contacted and informed promptly, and the issues then resolved.

In all other respects, the association as self-regulatory body found no other evidence to suggest that media service providers who had formally recognised the conduct guidelines had not (or not adequately) implemented them in practice.

In its effectiveness report published at the end of 2025, the association accordingly concludes that the television broadcasters and on-demand service providers who have recognised the new rules also implement these rules in practice.

The association plans to continue the effectiveness audit and the youth protection conformity audits of media services in the 2026 calendar year, so as to monitor and provide evidence of the implementation of the conduct guidelines..

### 3.1.7.2 Complaints scorecard

The self-regulatory body publishes an annual report that provides information about a number of topics, including the measures and decisions adopted by the body in the reporting year, the sanctions imposed as a result of breaches of the conduct guidelines, and the number, type and outcome of the complaints received.

Four formal complaints were submitted to the self-regulatory body in the 2025 calendar year in response to a breach of the conduct guidelines (2023: six; 2024: four). Three complaints were processed in this calendar year. The fourth complaint was received by the association's administrative office at the end of 2025: a decision on this case will therefore be issued in 2026.

One complaint alleged that an episode of a TV series broadcast on a Sunday afternoon contained explicit pornographic material.

In this case, the media service applied corresponding labelling (age rating '16+', descriptor 'sex') even before the experts council issued a decision. The programme is no longer broadcast during the daytime television slot. The episode is only available via the on-demand service in the evening or with an age-verified account.

After reviewing the programme in question, the association deemed the episode only suitable for viewers aged 16 and over in its current form. To maintain compliance with the conduct guidelines, the episode should therefore have been broadcast in the late evening slot (from 10 pm) or in the main evening slot (from 8 pm) with a corresponding age rating and a descriptor ('sex'). Given the nature and degree of the breach, and the fact that the media service took immediate action to label the episode in line with the conduct guidelines, the association applied the principle of proportionality pursuant to Art. 10 Par. 2 of its rules of procedure and decided not to levy a penalty.

Another complaint concerned a television programme rated '12+' that, in the complainant's view, explicitly made reference to three issues considered unsuitable for twelve-year-olds: sex (including vulgar references to and portrayals of the same), alcohol and smoking.

The media service provider had made the programme in question available on a streaming platform without any time-of-day access restrictions. All of the episodes in the season had been consistently labelled with a '12+' age rating. In the case of episodes 11 to 13, however, and in the interests of protecting minors, the experts council was of the opinion that it would have been more appropriate to apply time-of-day access restrictions or to broadcast an edited version of this material. In the view of the council, these episodes include clear portrayals of sexual activities and vulgar language that should not have been categorised as suitable for viewing by children or adolescents aged twelve or younger. On the other hand, the experts council did not consider the portrayals of alcohol consumption and smoking in these episodes to be inappropriate viewing for the age group in question.

The association therefore adjudged the media service to be in partial breach of the conduct guidelines: no time-of-day access restrictions had been applied to the episodes in question, nor had these episodes been edited to ensure their suitability for children or adolescents.

One complaint was dismissed due to incomplete information.

A summary of the decisions made to date by the expert council can be accessed on the association's website (in German) at: [www.jugendmedienschutz.at/entscheidungen](http://www.jugendmedienschutz.at/entscheidungen)

It has been possible to ensure a smooth workflow to process complaints and thus a sound procedure thanks to regular evaluations and reviews of the complaints system.

### 3.1.7.3 Activity report

Apart from a summary of complaints received, the activity report also covers other work completed by the association. One focus of the association's activities in 2025 was more extensive public relations work and engagement with stakeholders. These activities aimed to further raise awareness of the association and ensure that its monitoring function is recognised—and used—by the interested public.

This meant more intensive networking with relevant stakeholders, with both sides getting to know each other, exchanging views on important youth media protection issues, identifying common ground and providing insights into each other's work. (Stakeholders included the Austrian Digital Services Coordinator/ KommAustria, Youth Information Austria and Burgenland, youth affairs departments in the provincial governments, Mimikama, political parties, federal ministries, Google and the Austrian Chamber of Labour.)

The association also conducted networking activities with the new Swiss Youth Media Protection Association (FJSR) in 2025. Although the FJSR is a very new organisation, it intends to orient its work activities towards the conduct guidelines issued by the association.

The association's media relations work focused primarily on issuing press releases, and placing articles in trade and consumer media. The association also took part in several panels and round-table discussions. An introductory piece about the association was published on the [www.gewaltinfo.at](http://www.gewaltinfo.at) website in May.

### 3.1.7.4 Summary for 2025 and outlook for 2026

Looking at the reports submitted for 2025, the association offers the following conclusions about the past and upcoming calendar years.

Throughout 2025, there was a strong focus on obtaining new youth protection declarations and participating media services. This necessitated close cooperation with the Austrian audiovisual media industry that, in turn, yielded a further increase in the number of declarations received as well as progress in many other areas.

To achieve greater visibility and make itself more accessible to the general public, the association engaged in extensive and wide-ranging networking activities with public and private stakeholders.

The association also reviewed the practical application of the conduct guidelines by providers in 2025, as well as their level of compliance. According to the association, the spot checks it carried out in the reporting year show that most of the media services already comply with the media protection regulations for minors while also adhering to the recognised guidelines.

The complaints received confirm the active use of the complaint mechanism. Four complaints were received in the 2025 calendar year (2023: six; 2024: four) and the complaints management procedure worked as expected. The association takes the relatively low number of complaints about breaches of youth protection guidelines as evidence of the high level of compliance among media service providers that have voluntarily adopted its guidelines. As the association notes, this is the basic principle of self-regulation, i.e. prevention rather than sanctions.

In 2026, one focus of the association's activities will be to present the work of the association to the general public, to improve the visibility of the association and to organise meetings with stakeholders. Other activities are also planned in relation to the association's fifth anniversary, which it celebrates in 2026. Another focus in 2026 will be the work of the experts council, which continues to receive investment in recognition of its specialist expertise and its central role within the association.

Other priority areas for the association in 2026 will include the processing of incoming complaints, improving the acceptance and awareness of the conduct guidelines and rules of procedure in the industry, monitoring the implementation of these conduct guidelines by businesses in practice, and increasing the numbers of youth protection declarations received. Complaints management will continue to be evaluated as an ongoing process.

### **3.1.7.5 Report on the association's structure and working practice**

Pursuant to Art. 32a Par. 4 KOG, the self-regulatory body is to provide the regulatory authority with a report every four years, covering the body's structure and working practice and demonstrating its contribution to the goal of achieving compliance with minimum standards on the part of content providers.

Among other matters, the report presents the well-established organisational structure, with the management board as the executive body, the administrative office as the operative arm, the experts council as an independent decision-making body for complaints procedures, and rules of procedure for the complaints and decision-making process.

After formation, the association was quick to set up a solid structural basis for its work. Examples include the development of the conduct guidelines, internal codes and procedural standards, as well as the deployment of a well-functioning complaints system. Since 2022, the association has stepped up its efforts to establish acceptance in the industry, to intensify dialogue with media services and to obtain formal declarations of voluntary compliance. In recent years, good progress has been made both with the effectiveness audits and in recognising the association as a self-regulation body.

The association conducts rolling monitoring of audiovisual services by reviewing random samples of their content to confirm compliance with minimum standards. These reviews aim to ensure that labelling requirements are being met, and that age ratings and content descriptors are being provided in accordance with the conduct guidelines. The association also points to the low number of complaints procedures as evidence of the system's overall effectiveness in prevention.

### 3.1.8 Evaluation, assessment and recommendations by KommAustria to improve effectiveness

Based on the reports submitted, the regulatory authority must present in its activity report the level of compliance with the requirement to provide information in the form of content warnings to viewers. The regulatory authority must publish an activity report presenting its assessment of and recommendations on effectiveness.

First, on the basis of the reports submitted during 2025, it needs to be seen that both the association's internal processes and the complaints management system are in general well established. The number of complaints, actually moderate, made it possible to further review and evaluate the functioning of the complaints system. One positive development in this context is the fact that two of the complaints received in 2025 led to content reviews and subsequent decisions.

Beyond that, the association endeavoured to increase recognition of the self-regulation system among broadcasters and media service providers, with this process again proving effective in 2025. The number of television broadcasters and on-demand service providers who recognise the self-regulation system increased by more than 10% year on year, a result that underlines the consistently increasing acceptance of the association in Austria, including among smaller providers.

Another focus was on raising the association's public profile through increased public relations and media work.

KommAustria welcomes the continued progress in the way of organisation and areas of activity, as presented in the reports, which the association has made since its founding. The continuous process of professionalisation, the handling of complaints and the routine effectiveness audits give KommAustria no grounds for calling into question the basic effectiveness of the self-regulation system as established by the association. The report on structure and working practice further substantiates this assessment.

In consideration of the above, KommAustria welcomes the priorities as announced by the association for its future work, while adding the comments listed below.

In 2025, the association successfully pursued its primary objective of convincing providers of the merits of the self-regulation mechanism and the uniform nationwide conduct guidelines. The association should continue its efforts to obtain more youth protection declarations, not least because, in the event of failing to publish such a declaration, an Austrian media service is required by law to draw up and monitor specific conduct guidelines directly (cf. Art. 39 Par. 4 AMD-G).

Key priorities here include enhancing the self-regulatory body's public visibility and raising awareness of its supervisory role among interested members of the public. Such work must also address public knowledge and use of the complaint mechanism. KommAustria views the low volume of complaints received as clear evidence of the system's overall effectiveness.

To ensure the self-regulation system can achieve its full potential, a continued focus on the association's tasks and objectives (as envisaged by its statutes) would appear appropriate. This includes further strengthening the industry's acceptance, knowledge and application of the conduct guidelines.

Another crucial aspect here is to audit media service providers to ensure compliance with their self-imposed guidelines. Conducted as a rolling audit by the self-regulatory body, this process should include monitoring proper application of age limits/categories, broadcasting time restrictions as well as information and descriptors. Efforts should be stepped up here, however, considering the continued public attention paid to aspects of youth protection inherent to certain broadcasting formats. In this context, mention is also made of a key decision (although not legally enforceable) issued by KommAustria in the reporting period concerning an episode of a reality TV series offered as on-demand content by an Austrian media service provider. The decision finds that this episode violates human dignity, incites gender-based violence against women and breaches the youth protection provisions of the AMD-G by making this episode available on demand

## 3.2 Report on Accessibility

Figures from Statistics Austria show that Austria is home to around 1.9 million people whose state of health affects their day-to-day lives.<sup>8</sup> Of these, around 760,300 people have ‘formally recognised’ disabilities: these are persons with various levels of disability who are reflected in official statistics based, for example, on their disabled person’s pass or their entitlement to disability benefits.<sup>9</sup>

Only a small percentage of such disabilities are congenital or are acquired as a result of an accident or an occupational illness. The vast majority are the result of a disease or disorder.<sup>10</sup> Nor should it be forgotten that disabilities also affect older people especially.

The following groups are most likely to experience restrictions to participation in society and democratic discourse:

- People with vision impairment or blindness
- People with hearing impairments
- People with physical or motor impairments affecting the upper limbs
- People with learning difficulties

These restrictions to participation may influence a person’s ability to access media and therefore limit the extent to which they can inform themselves of available options and services.

The UN Convention on the Rights of Persons with Disabilities—and the subsequent EU Directive on Audiovisual Media Services—introduced ‘accessibility’ as one of its foundational principles.<sup>11</sup> Accessibility is a prerequisite for people with disabilities to be able to live independently, participate equally in society and exercise their rights.

Pursuant to Article 8 (1) of the UN Convention on the Rights of Persons with Disabilities (UN CPRD),<sup>12</sup> the signatory countries are committed to taking immediate, effective and appropriate measures

- a) *To raise awareness throughout society, including at the family level, regarding persons with disabilities, and to foster respect for the rights and dignity of persons with disabilities;*
- b) *To combat stereotypes, prejudices and harmful practices relating to persons with disabilities, including those based on sex and age, in all areas of life;*
- c) *To promote awareness of the capabilities and contributions of persons with disabilities.*

Paragraph (2) sets out measures to promote awareness, with (c) specifying the measure of *encouraging all organs of the media to portray persons with disabilities in a manner consistent with the purpose of the present Convention.*

8 cf. People with disabilities in Austria I (in German):

<https://www.statistik.at/services/tools/serviceangebote/publikationen/detail/1860> (accessed on 9 April 2026)

9 cf. People with disabilities (in German): <https://www.sozialministerium.at/Themen/Soziales/Menschen-mit-Behinderungen.html> (accessed on 25 March 2025)

10 For figures, see the federal government’s third report on the situation of people with disabilities, available (in German) at <https://www.sozialministerium.at/Themen/Soziales/Menschen-mit-Behinderungen/Bericht-der-Bundesregierung-ueber-die-Lage-der-Menschen-mit-Behinderung.html> (accessed 21 April 2022)

11 Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive), last amended by Directive (EU) 2018/1808

12 cf. UN CPRD: <https://www.sozialministerium.at/Themen/Soziales/Menschen-mit-Behinderungen/UN-Behindertenrechtskonvention.html> (in German)

The Audiovisual Media Services Directive<sup>13</sup> defines media accessibility as an essential precondition for ensuring that people with disabilities can participate in cultural and social life: this law requires EU Member States to ensure that media service providers make their services progressively more accessible.

When applied to media, this means that media must be discoverable, accessible and usable by people with disabilities in a general and typical manner without encountering undue difficulty or requiring additional assistance. Providers can use a range of tools to satisfy these criteria, including subtitling, plain language, audio description and sign-language interpretation, as well as ensuring the accessible use of devices.

Guaranteeing accessibility of audiovisual content is a key requirement in the context of the obligations entered into by parties to the United Nations Convention on the Rights of Persons with Disabilities.

Media service providers should “actively seek to make content accessible to persons with disabilities, in particular with a visual or hearing impairment”<sup>14</sup>. Accessible pathways to content should also be created for people with other disabilities such as learning difficulties. Accessibility requirements should be met through a progressive and continuous process, while taking into account the practical and unavoidable constraints that could prevent full accessibility, such as in the case of broadcasts of live programmes or events.

While audiovisual media primarily target the recipient’s vision and hearing—with visual content being especially important for perception and impact—such media should nonetheless be designed to ensure that their consumption is not dependent on these two senses. Nor should a person’s individual needs impede their ability to experience the range of emotions imparted by a specific piece of media.

The ever-present nature of audiovisual media and video content in contemporary society disadvantages those who are unable to follow such content. Apart from modifying the content itself (e.g. choice of font or font size), technical aids can also help to remove barriers to accessibility and facilitate participation.

### 3.2.1 Legal basis

The legal basis for increasing percentage shares of accessible content and for preparing action plans and reports are, first, the Audiovisual Media Services Act (AMD-G), and, second, the ORF Act (ORF-G).

Pursuant to Art. 30b Par. 1 AMD-G, media service providers are to achieve a continuous and step-by-step annual increase in programmes that meet accessibility standards compared with programming as at 31 December 2020. This increase is to be achieved throughout all of their channels and programming in accordance with their economic capabilities while also accounting for the financing provided for such measures from public funds. In terms of live content, the greater degree of effort required to ensure accessibility to this content permits certain technically justifiable exemptions.

To achieve the goals of ensuring accessibility for audiovisual content, Art. 30b Par. 2 AMD-G stipulates that providers of audiovisual media services should take appropriate steps to ensure a continuous and progressive increase in the proportion of accessible audiovisual content they provide. Media service providers must provide details of how they intend to implement these measures by preparing an action plan in consultation with a representative organisation acting on behalf of people with vision or hearing impairments and on behalf of people with intellectual disabilities. This action plan must set out concrete details for a three-year time frame and build on the earlier action plan adopted for the prior period. The plan must also ensure an annual increase in the proportion of programmes meeting accessibility standards, within the categories of news and current affairs, entertainment, education, art and culture, and sports. In terms of live programming, justifiable technical exemptions from the requirement to pursue this proportional increase can be made, as make such content accessible requires additional effort. Media service providers must publish the action plan so as to

13 Directive 2010/13/EU on the coordination of certain provisions laid down by law, regulation or administrative action in Member States concerning the provision of audiovisual media services (Audiovisual Media Services Directive), last amended by Directive (EU) 2018/1808

14 cf. Directive (EU) 2018/1808, Recital 22

be easily and immediately available, and accessible at all times. The action plan must also be submitted to KommAustria in a standardised format.

Exemptions to this requirement are granted to media service providers whose audiovisual media service generated no more than EUR 500,000 in revenues in the previous year. Media service providers whose programming is of an exclusively local or regional nature are also granted an exemption from this requirement for the audiovisual media services that they offer.

A failure to prepare or publish an action plan is liable to sanction by administrative penalty. Where an action plan is not made available, KommAustria may also initiate a supervisory procedure or take action in response to a public complaint.

Similar provisions are envisaged for the ORF in Art. 5 ORF-G.

Pursuant to Art. 5 Par. 2 ORF-G, news and current affairs television broadcasts (Art. 3 Par. 1) must be designed, as far as technical advances and economic feasibility permit, to simplify the consumption of such broadcasts by individuals with vision and/or hearing impairments and persons with intellectual disabilities, the latter requiring content in plain language. Beyond that, the ORF is required to offer at least one news broadcast in plain language during its daytime programming (9 am to 10 pm).

The ORF is also to ensure that appropriate measures are taken to ensure a continuous and progressive increase in the respective proportion of audiovisual content made accessible to individuals with intellectual disabilities (who require content in plain language) as well as to people with vision and/or hearing impairments, in comparison with programming as at 31 December 2020. The ORF may also be granted technically justifiable exemptions in the case of live content.

The ORF must provide details of the measures intended to increase the aforesaid proportion by preparing an annual action plan in consultation with the Audience Council and with the representative organisations for people with vision or hearing impairments and individuals with intellectual disabilities. This plan must include a detailed, three-year timetable for the annual increase in the proportion of ORF programming and online content that meets accessibility requirements (excepting live broadcasts), within the categories of news and current affairs, entertainment, education, arts and culture, and sports.

Art. 5 Par. 2 ORF-G also specifies an annual increase of at least 2.5% in the categories of news and current affairs, education, and arts and culture, and of at least 4% in the category of entertainment, compared with figures at the end of the prior calendar year. Here priority is to be given to ensuring accessibility for all television broadcasts in early evening and main evening programming (7 pm to 10 pm) as well as online services provided pursuant to Art. 4e Par. 1 No. 4 ORF-G and approved pursuant to Art. 4f Par. 1 ORF-G in conjunction with Art. 6b ORF-G. Additional priority is to be given to regional broadcasts in the news and current affairs category, press conferences and broadcasts reporting on elections or election results, and children's programming in the categories of news and current affairs, and entertainment.

As of 31 December 2025, 16 media service providers had submitted action plans for a total of 21 channels. Of these action plans, four apply to the period 2023–2025 and therefore end within the timeframe of the 2025 annual report. Thirteen plans cover the period 2024–2026, with another five starting in 2025. An annual report has been submitted for 19 channels.

KommAustria is tasked with reporting on the status quo and developments in relation to the duties as described in Art. 30b Par. 1 AMD-G and in Art. 5 Par. 2 ORF-G, together with a comparative presentation of intended target values and the actual values as achieved. Both provisions require, by 31 March of the year after the reporting period, the preparation of an annual report on implementation of the measures specified in the action plan and the proportional increase achieved. These reports are to be published in the same way as the action plans.

Several infringement procedures were conducted in 2025. Procedures were conducted against four providers because of their failure to publish a 2024 annual report, and against one further provider on account of late submission of a report.

Pursuant to Art. 30b Par. 4 AMD-G, the regulatory authority's annual report (Art. 19 KOG) must present for each media service provider the status quo and any changes in terms of the requirements described in Par. 1, in the form of a comparative presentation of intended target values and the actual values achieved by the provider. The regulatory authority can enclose with this report, supported by RTR as a service point pursuant to Art. 20b KOG, a statement about further improvements to accessibility.

Pursuant to Art. 20b KOG, RTR has the remit to act as a service point for complaints and information services relating to accessible audiovisual media services and to accordingly provide information for media service providers and for the general public. This information is presented under [www.rtr.at/barrierefreiheit](http://www.rtr.at/barrierefreiheit) (in German). Furthermore, RTR serves as a complaints board for accessibility issues in relation to the content of audiovisual media services. The complaints board received no complaints relating to accessibility issues in 2024.

## 3.2.2 Reports on action plans

In accordance with statements provided by media service providers, the preparation of all action plans was preceded by a consultation with a representative organisation acting on behalf of people with vision or hearing impairments and on behalf of people with learning difficulties. The action plans are subdivided into the categories of entertainment, news and current affairs, education, arts and culture, and sports.

Most of the action plans currently in force apply to the 2024–2026 period. For many providers, this is their second three-year action plan.

### 3.2.2.1 AT Media Holding GmbH

Table 20: Planned increase for the Schlager Deluxe channel according to action plan (in %)

Schlager Deluxe	Base year 2025	2026	2027	2028
Planned increase according to action plan	70.49%	70.59%	70.62%	70.66%
Actual increase according to annual reports	-	-	-	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

AT Media Holding GmbH did not submit a report.

### 3.2.2.2 ATV Privat TV GmbH & Co KG

ATV Privat TV GmbH & Co KG submitted one report for all of its channels (ATV, ATV 2 and atv.at).

#### 3.2.2.2.1 ATV

Table 21: Planned increase for the ATV channel according to action plan (in %)

ATV	Base year 2023	2024	2025	2026
Planned increase according to action plan	1.03%	3.00%	6.00%	9.01%
Actual increase according to annual reports	1.08%	3.78%	8.21%	-

In the 2025 reporting period, a total of 43,140 minutes (8.21%) were subtitled in the 'Entertainment' category on the ATV channel.

The figure stated in the annual report thus exceeds the target in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
525,600 minutes	43,140 minutes (8.21%)	Entertainment	Subtitling

#### 3.2.2.2.2 ATV 2

Table 22: Planned increase for the ATV 2 channel according to action plan (in %)

ATV 2	Base year 2023	2024	2025	2026
Planned increase according to action plan	1.05%	3.00%	5.99%	8.99%
Actual increase according to annual reports	1.13%	3.40%	6.86%	-

In the 2025 reporting period, a total of 36,066 minutes (6.86%) were subtitled in the 'Entertainment' category on the ATV 2 channel.

The figure stated in the annual report thus exceeds the target in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
525,600 minutes	36,066 minutes (6.86%)	Entertainment	Subtitling

### 3.2.2.2.3 atv.at

Table 23: Planned increase for the atv.at channel according to action plan (in %)

atv.at	Base year 2022	2023	2024	2025
Planned increase according to action plan	0.00%	0.06%	0.08%	0.09%
Actual increase according to annual reports	-	0.12%	0.09%	1.70%

In the 2025 reporting period, ATV provided a total of 5,405 minutes (1.70%) of overall channel programming as accessible content.

The figure stated in the annual report therefore exceeds the target as stated in the action plan. The annual report also reveals that the 'Information' category cited in the action plan has since been replaced by the 'Entertainment' category. Details of the specific measures taken are not provided, however: instead, the report merely mentions the introduction of AI auto-subtitling as well as further improvements to the platform's compatibility with screen readers.

The report also notes that all atv.at content was migrated to Joyn in 2025 and is now available on that platform.

Annual broadcasting time	Accessible percentage share	Category	Measures
318,000 minutes	5,405 minutes (1.70%)	Entertainment	n. a.

## 3.2.2.3 Krone Multimedia Gesellschaft m.b.H. & Co. KG

Krone Multimedia Gesellschaft m.b.H. & Co. KG submitted one report for all channels (KRONE TV, krone.tv).

### 3.2.2.3.1 KRONE TV

Table 24: Planned increase for the KRONE TV channel according to action plan (in %)

KRONE TV	Base year 2022	2023	2024	2025
Planned increase according to action plan	0.20%	0.30%	50.14%	50.86
Actual increase according to annual reports	-	-	50.00%	51.00%

In the 2025 reporting period, a total of 536,112 minutes (51.00%) of overall channel programming were subtitled.

The action plan targets were therefore exceeded.

Annual broadcasting time	Accessible percentage share	Category	Measures
1,051,200 minutes	536,112 minutes (51.0%)	Sports, news and current affairs, and entertainment	Subtitling

### 3.2.2.3.2 krone.tv

Table 25: Planned increase for the krone.tv channel according to action plan (in %)

krone.tv	Base year 2022	2023	2024	2025
Planned increase according to action plan	0.00%	0.56%	1.50%	2.27%
Actual increase according to annual reports	-	-	1.50%	2.27%

In the 2025 reporting period, 13,918 minutes (2.27%) were subtitled on the krone.tv channel.

This figure from the annual report therefore matches the target as stated in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
613,119 minutes	13,918 minutes (2.27%)	Sports, news and current affairs, and entertainment	Subtitling

### 3.2.2.4 MediaShop GmbH

Table 26: Planned increase for the Mediashop Meine Einkaufswelt channel according to action plan (in %)

MediaShop	Base year 2023	2024	2025	2026
Planned increase according to action plan	1.12%	1.21%	1.30%	1.40%
Actual increase according to annual reports	-	1.21%	-	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

MediaShop GmbH did not submit a report.

Annual broadcasting time	Accessible percentage share	Category	Measures
n. a.	n. a.	n. a.	n. a.

### 3.2.2.5 Melodie Express GmbH

Table 27: Planned increase for the Melodie TV channel according to action plan (in %)

Melodie TV	Base year 2024	2025	2026	2027
Planned increase according to action plan	0.38%	0.44%	0.49%	0.55%
Actual increase according to annual reports	0.40%	0.46%	-	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

Melodie Express GmbH submitted a report, stating that 2,400 minutes (0.46%) of channel programming in 'Entertainment' were subtitled in 2025.

Annual broadcasting time	Accessible percentage share	Category	Measures
525,600 minutes	2,400 minutes (0.46%)	Entertainment	Subtitling

### 3.2.2.6 ProSiebenAustria GmbH

Table 28: Planned increase for the ProSieben Austria channel according to action plan (in %)

ProSieben Austria	Base year 2023	2024	2025	2026
Planned increase according to action plan	0.99%	1.29%	1.60%	1.90%
Actual increase according to annual reports	0.99%	1.03%	1.84%	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

ProSieben Austria GmbH submitted a report.

In the 2025 reporting period, 944 minutes (1.84%) were subtitled on the ProSieben Austria channel.

The figures specified in the action plan were therefore exceeded both as absolute minutes and as percentages. At the same time, ProSieben Austria highlights the difference in total broadcasting time between the action plan and annual report, noting that this limits the validity of a direct comparison between the figures.

The annual report also reveals that the 'Education' category envisaged in the action plan has been replaced by the 'Entertainment' category in the current report. ProSiebenSat.1 PULS 4 GmbH

Annual broadcasting time	Accessible percentage share	Category	Measures
51,175 minutes	944 minutes (1.84%)	Entertainment	Subtitling

### 3.2.2.7 ProSiebenSat.1 PULS4 GmbH

Table 29: Planned increase for the JOYN channel according to action plan (in %)

JOYN	Base year 2023	2024	2025	2026
Planned increase according to action plan	0.00%	0.01%	0.10%	0.20%
Actual increase according to annual reports	-	0.02%	1.07%	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

ProSiebenSat.1 PULS 4 GmbH submitted a report, stating that the JOYN channel subtitled 12,888 minutes (1.07%) overall in the 2025 reporting period. Figures from the annual report show that JOYN provided 699 minutes (0.06%) of accessible content in the 'News and current affairs' category and 12,189 minutes (1.016%) in 'Entertainment'

The figures stated here from the annual report therefore exceed the targets in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
1,200,000 minutes	12,888 minutes (1.07%)	News and current affairs and entertainment	Subtitling

### 3.2.2.8 PULS 4 TV GmbH & Co KG

PULS 4 TV GmbH & Co KG submitted one report for all channels (PULS 4 and PULS 24).

#### 3.2.2.8.1 PULS 4

Table 30: Planned increase for the PULS 4 channel according to action plan (in %)

Puls 4	Base year 2023	2024	2025	2026
Planned increase according to action plan	1.00%	3.00%	5.99%	8.99%
Actual increase according to annual reports	1.02%	3.71%	6.22%	-

In the 2025 reporting period, a total of 32,675 minutes (6.22%) were subtitled in the 'Entertainment' category on the PULS 4 channel.

The figure stated in the annual report thus exceeds the target in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
525,600 minutes	32,675 minutes (6.22%)	Entertainment	Subtitling

### 3.2.2.8.2 PULS 24

Table 31: Planned increase for the PULS 24 channel according to action plan (in %)

Puls 24	Base year 2023	2024	2025	2026
Planned increase according to action plan	0.30%	1.20%	2.40%	4.79%
Actual increase according to annual reports	0.38%	1.20%	2.41%	-

In the 2025 reporting period, a total of 12,693 minutes (2.41%) were subtitled in the 'Entertainment' category on the PULS 24 channel.

The figure stated in the annual report thus exceeds the target in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
525,600 minutes	12,693 minutes (2.41%)	Entertainment	Subtitling

### 3.2.2.9 Red Bull Media House GmbH

Table 32: Planned increase for the ServusTV channel according to action plan (in %)

ServusTV	Base year 2023	2024	2025	2026
Planned increase according to action plan	6.17%	6.50%	6.95%	7.51%
Actual increase according to annual reports	5.89%	7.78%	10.51%	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

Red Bull Media House GmbH submitted one report for both channels by the due date.

From a total of 37,277 minutes (10.51%) of accessible programmes within overall programming offered by the ServusTV service, 4,595 minutes (34.28%) were subtitled in the category of news and current affairs, 29,516 minutes (51.02%) in education, and 25 minutes (4.40%) in arts and culture. The channel also achieved 241 minutes (3.30%) in the sports category and 2,900 minutes (1.33%) in the entertainment category. The percentages specified in brackets for the categories each relate to the specified category. The figures given in the annual report for 'Entertainment' and 'Arts and culture' are therefore lower than the action plan targets, although the figures for 'News and current affairs', 'Sports' and 'Education' significantly exceed the corresponding targets. Overall, the channel achieved an annual result well above the target figure.

Annual broadcasting time	Accessible percentage share	Category	Measures
354,837 minutes	37,277 minutes (10.51%)	all	Subtitling, audio description

### 3.2.2.10 Sa Fira Blue GmbH (ViktoriaSarina)

Table 33: Planned increase for the ViktoriaSarina YouTube channel according to action plan (in %)

ViktoriaSarina	Base year 2024	2025	2026	2027
Planned increase according to action plan	8.1%	9.4%	10.8%	12.10%
Actual increase according to annual reports	8.1%	Breakdown, no details of overall increase	-	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

Sa Fira Blue GmbH submitted a report.

Annual broadcasting time	Accessible percentage share	Category	Measures
n. a.	n. a.	Entertainment	Plain language

### 3.2.2.11 Sascha Huber GmbH

Table 34: Planned increase for the Sascha Huber YouTube channel according to action plan (in %)

Sascha Huber	Base year 2024	2025	2026	2027
Planned increase according to action plan	4.00%	4.25%	4.50%	4.75%
Actual increase according to annual reports	5.00%	5.00%	-	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

Sascha Huber GmbH submitted a report.

In the 2025 reporting period, Sascha Huber subtitled 60 minutes (5%) of overall channel programming in the sports category. Both the minute and percentage figures given in the annual report thus exceed the respective action plan targets.

Annual broadcasting time	Accessible percentage share	Category	Measures
1,200 minutes	60 minutes (5.00%)	Sports	Subtitling

### 3.2.2.12 SAT.1 Privatrundfunk und Programmgesellschaft mbH

Table 35: Planned increase for the SAT.1 Österreich channel according to action plan (in %)

SAT.1 Österreich	Base year 2023	2024	2025	2026
Planned increase according to action plan	0.92%	1.20%	1.49%	1.79%
Actual increase according to annual reports	1.16%	1.02%	1.65%	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

SAT.1 Privatrundfunk und Programmgesellschaft mbH have presented a report.

In the 2025 reporting period, a total of 871 minutes (1.65%) in the entertainment category were subtitled on the SAT.1 Österreich channel. The figures specified in the action plan were therefore exceeded both as absolute minutes and as percentages. At the same time, SAT.1 Österreich highlights the difference in total broadcasting time between the action plan and annual report, noting that this limits the validity of a direct comparison between the figures.

The annual report also reveals that the 'Education' category envisaged in the action plan has been replaced by the 'Entertainment' category in the current report.

Annual broadcasting time	Accessible percentage share	Category	Measures
52,920 minutes	871 minutes (1.65%)	Entertainment	Subtitling

### 3.2.2.13 schau Media Wien GesmbH

Table 36: Planned increase for the Kurier TV channel according to action plan (in %)

Kurier TV	Base year 2024	2025	2026	2027
Planned increase according to action plan	0.1%	0.21%	0.31%	0.42%
Actual increase according to annual reports	0.1%	0.21%	-	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

schau Media Wien GesmbH submitted a report by the due date.

This report confirms the use of subtitling by the channel. Within the action plan period of 2025–2027, accessible programmes are to be offered in the categories of news and current affairs and entertainment.

In the category of news and current affairs, 800 minutes (0.15%) of programming were subtitled, and 300 minutes (0.06%) in entertainment.

Annual broadcasting time	Accessible percentage share	Category	Measures
525,600 minutes	1,100 minutes (0.21%)	News and current affairs and entertainment	Subtitling

### 3.2.2.14 Sky Österreich Fernsehen GmbH

Sky Österreich Fernsehen GmbH submitted one report for all of its channels (18+ App, Sky Sport Austria).

#### 3.2.2.14.1 „18+“-App

Table 37: Planned increase for the „18+“-App channel according to action plan (in %)

„18+“ App	Base year 2023	2024	2025	2026
Planned increase according to action plan	2.04%	3.56%	3.70%	3.87%
Actual increase according to annual reports	3.77%	9.00%	12.34%	-

In the 2025 reporting period, 35,322 minutes (12.34%) of all broadcasts in the entertainment category were subtitled on the 18+ App (Blue Movie) channel.

The figure stated in the annual report thus exceeds the target in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
286,240 minutes	35,322 minutes (12.34%)	Entertainment	Subtitling

#### 3.2.2.14.2 Sky Sport Austria

Table 38: Planned increase for the Sky Sport Austria channel according to action plan (in %)

Sky Sport Austria	Base year 2023	2024	2025	2026
Planned increase according to action plan	0.86%	1.25%	1.58%	1.80%
Actual increase according to annual reports	0.98%	1.32%	1.92%	-

In the 2025 reporting period, a total of 10,080 minutes (1.92%) in the sports category were subtitled on the Sky Sport Austria channel. Sky Österreich Fernsehen GmbH therefore exceeded the target from the action plan for 2025.

Annual broadcasting time	Accessible percentage share	Category	Measures
525,600 minutes	10,080 minutes (1.92%)	Sports	Subtitling

### 3.2.2.15 T-Mobile Austria GmbH

Table 39: Planned increase for the Magenta On Demand channel according to action plan (in %)

Magenta On Demand	Base year 2023	2024	2025	2026
Planned increase according to action plan	40.32%	41.2%	43%	44%
Actual increase according to annual reports	40.32%	41.2%	53.52%	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

In the 2025 reporting period, 136,718 minutes (53.52%) of overall programming in the entertainment category were subtitled.

The figure stated in the annual report thus exceeds the target specified in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
255,453 minutes	136,718 minutes (53.52%)	Entertainment	Subtitling

### 3.2.2.16 wedify GmbH

Table 40: Planned increase for the A1 Xplore TV video library according to action plan (in %)

A1 Xplore TV Videothek	Base year 2023	2024	2025	2026
Planned increase according to action plan	16.0%	21.0%	23.0%	25.0%
Actual increase according to annual reports	16.01%	31.36%	34.58%	-

#### Reporting requirements pursuant to Art. 30b Par. 3 AMD-G

wedify GmbH submitted a report.

In the 2025 reporting period, 339,840 minutes (34.58%) of overall programming in the entertainment category were subtitled.

Accordingly, the figure stated in the annual report exceeds the target in the action plan.

Annual broadcasting time	Accessible percentage share	Category	Measures
982,680 minutes	339,840 minutes (34.58%)	Entertainment	Subtitling

### 3.2.3 Austrian Broadcasting Corporation (ORF)

As noted above in section 2, the ORF is subject to the provisions of Art. 5 Par. 2 ORF-G.

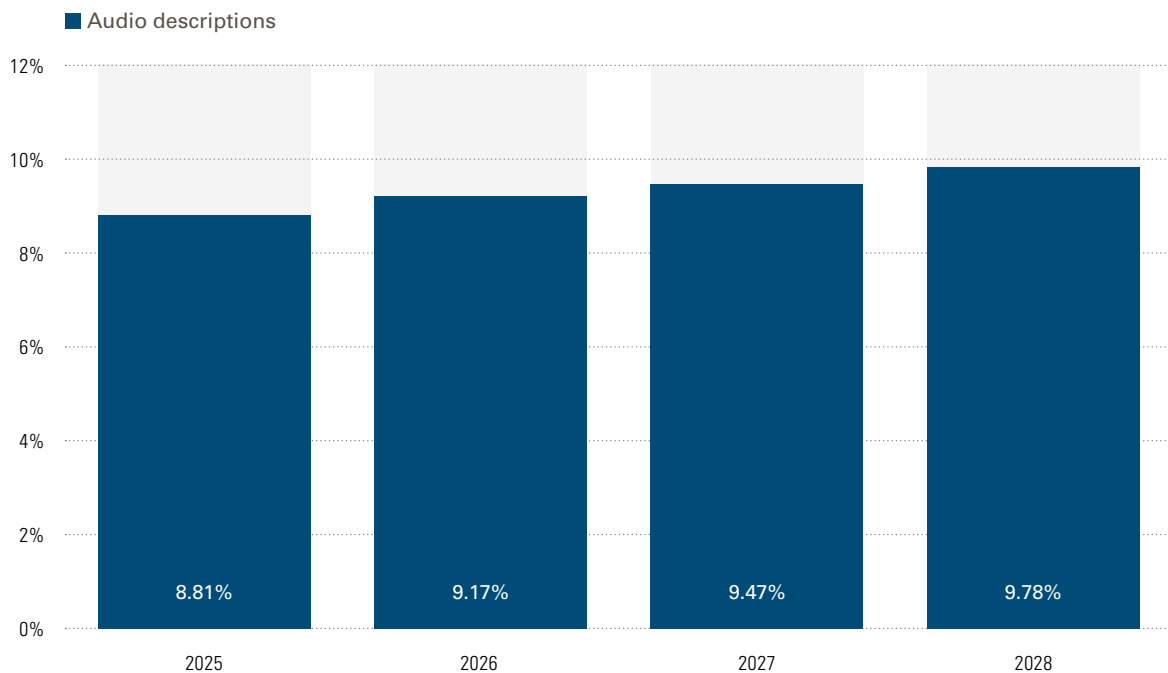
The ORF is therefore required to prepare a rolling three-year action plan on an annual basis. This action plan must include a detailed, three-year timetable for achieving annual improvements in the proportion of accessible broadcasts and online programming. Separate targets are stated for 'News and current affairs,' 'Entertainment,' 'Education,' 'Arts and culture' and 'Sports.'

The action plan must be published so as to be easily and immediately available and accessible at all times, and the regulatory authority must be notified. The ORF published its 2025–2028 action plan at <https://der.orf.at/unternehmen/humanitarian/barrierefreiheit/aktionsplan-barrierefreiheit104.html> (in German): the baseline year for the plan is 2025, and the planned measures are described for 2026, 2027 and 2028.

The action plan highlights a number of measures that were implemented during 2025, including the following:

- As a result of talking to interest groups, more content was offered with audio descriptions in evening television.
- Live subtitling powered by AI was launched in late September. Although several issues need to be addressed here, the ORF plans to further develop and expand this service.
- Subtitling and sign-language interpretation were offered for more special broadcasts.

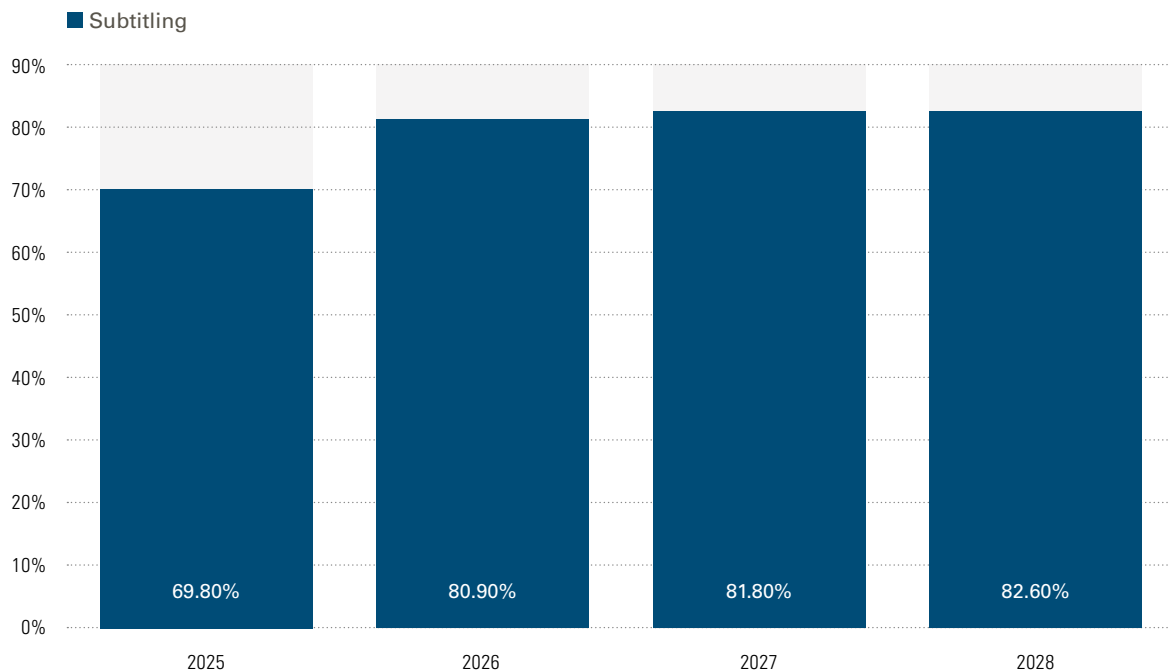
**Figure 03: Planned increase in audio descriptions across all ORF channels, according to action plan (in %)**



Audio descriptions at the ORF according to the 2025–2028 action plan

Audio descriptions clearly target the (early) evening television slot, with mainly films and series suitable for being made accessible in this way.

**Figure 04: Planned increase in subtitling rate across all ORF channels, according to action plan (in %)**



Subtitling at the ORF  
according to the 2025–2028 action plan

Live subtitling powered by AI was launched fairly late in the year and therefore had little impact on figures for 2025. It should also be noted that 99.5% of children's programming was provided with subtitles during the reporting year.

Consultations with interest groups highlighted the need to offer sign-language interpretation for a more content in the areas of service as well as news and current affairs. To achieve this goal, the ORF increased the number of interpreters it works with and also plans to introduce sign-language interpreting for another broadcast in 2026.

The proportion of accessible content in the ORF's streaming services is similar to that found in the broadcaster's linear programming. This stems from the fact that much of this content is first broadcast in (or, as a live stream, simultaneously with) the linear format. The ORF is therefore planning to increase the proportion of accessible content in its online-first programming and archive materials.

#### **Reporting requirements pursuant to Art. 30b Par. 3 AMD-G**

The ORF submitted reports for all channels with reporting requirements by the due date.

**Table 41: Accessible share of TV programming for the ORF in 2025 (percentages)**

Percentage shares of accessible content in the ORF (linear programming)	Subtitling	Audio description	Sign language (ÖGS)	Plain language	Total accessible percentage share
News and current affairs	81.1%	0.3%	10.7%	0.3%	81.1%
Entertainment	98.5%	17.4%	0.07%	0.0%	98.5%
Education	99.7%	2.4%	6.4%	0.0%	99.7%
Arts and culture	74.5%	6.3%	0.93%	0.0%	74.5%
Sports	28.3%	8.2%	0.3%	0.0%	28.3%
Channels overall	69.8%	8.8%	2.5%	0.05%	69.8%

**Table 42: Accessible proportion on ORF ON in 2025 (percentages)**

Accessible proportions on ORF ON	Subtitling	Audio description	Sign language (ÖGS)	Plain language	Total accessible percentage share
News and current affairs	76.8%	0.3%	9.7%	0.4%	76.8%
Entertainment	97.8%	20.6%	0.08%	0.0%	97.8%
Education	99.2%	3.7%	9.8%	0.0%	99.2%
Arts and culture	68.8%	8.8%	1.4%	0.0%	68.8%
Sports	27.4%	12.4%	0.4%	0.0%	27.4%
Channels overall	72.1%	11.3%	3.4%	0.1%	72.1%

### 3.2.4 Statement about further improvements to accessibility

In the case of four providers, 2025 was the first year of their new action plan. One other provider became subject to the provisions of Art. 30b AMD-G for the first time in 2025.

Alongside the annual action plan and annual report from the ORF, five new action plans were therefore received at the end of 2025. Only 19 annual reports were submitted, with two media service providers thus failing to submit their report.

Action plan targets were achieved or exceeded in 18 cases; in the last case, a performance analysis could not be completed.

Several channels exhibited discrepancies in broadcasting time between 2025 and previous years. This fact prevents a direct comparison between the figures as stated in the action plan and the numbers achieved in the years before. In these cases, the accessible proportion actually achieved in 2025 was applied instead.

Once again, 'Entertainment' content was given preferential treatment for accessibility, with 17 annual reports mentioning this category, followed by 'Sports' and 'News and current affairs' (five reports each). One provider increased the proportion of accessible content in 'Education', and another provider did the same for the 'Arts and culture' category. The overall situation for people needing accessible content therefore saw few material improvements in 2025, and only limited content is available. On the other hand, more content in news and current affairs is indeed now accessible compared with 2023. In this context it also needs to be mentioned

that, among the channels subject to the provisions of Art. 30b of the Audiovisual Media Services Act (AMD-G), not all categories are equally represented.

As in previous years, subtitling remains the broadcaster's tool of choice for improving accessibility, with this measure being mentioned in 17 reports. This is in stark contrast to the figures for audio description and sign language (two reports each) and plain language (none).

This summary does not apply to the ORF, as its legal duties arising from the ORF-G differ to those imposed by the AMD-G. Specifically, the ORF is required to offer specific percentages of accessible programming while such accessible content also must meet certain standards. One of those requirements addresses children's programming. The 2025 annual report states that the ORF achieved a 99.5% subtitling rate in children's programmes and provided audio descriptions for some children's content.

Although the overall picture resulting from the annual reports submitted for 2025 resembles that from previous years, it is nonetheless noteworthy that many media service providers were able to meet and exceed their self-imposed targets. Measures were also adopted beyond the duties set out by the AMD-G, with a greater focus being placed on both usability and discoverability. This was achieved by clearer links to accessible programming in media libraries, for example, together with quality improvements to the content itself.

Technological progress—foremost in the form of artificial intelligence (AI)—also features prominently in action plans and annual reports alike. At present, AI is used mainly for automated subtitling, although several providers have already expressed an interest in exploring its potential further. At the same time, providers openly acknowledge the teething troubles with the technology or even question its readiness for production use.

Success here will be critically dependent on the participation of target audiences.

### 3.2.5 Measures adopted

Action plans and annual reports must provide details not only of the subject categories in which efforts will be made to improve accessibility but also of the measures to be adopted with the aim of achieving this goal. Accordingly, media service providers must state which of the following measures they will use in their programming:

- Audio description
- Plain language
- Sign language
- Subtitles

All these measures ensure greater participation on the part of various audiences, yet the degree to which they are used is anything but uniform—as explained under “[3.2.4 Statement](#).” Technological progress has made it easier to implement measures to enhance accessibility in a number of areas. However, as several reports make clear, the practical application of these technologies is not without its challenges.

### 3.2.5.1 Plain language

The term *plain language* refers to the conscious avoidance of complex grammar or rarely used words such as foreign vocabulary. While there is no universal consensus on what constitutes plain language, a standard that sets out some governing principles and guidelines for authoring documents in plain language was published by Austrian Standards International in 2025. This standard can also be utilised for the preparation of other communications products, such as podcasts and videos.<sup>15</sup>

In contrast to plain language, *easy language* makes use of a predefined ruleset that governs the use of loanwords or the length of lines and paragraphs, for example.

Both approaches nonetheless have the same goal in mind: to make content easier to understand.

As in 2024, only one media services provider other than the ORF stated that they had offered content in plain language during 2025. The ORF has a legal requirement to broadcast at least one news program in plain language between the hours of 9 am and 10 pm. Although the ORF also applied this measure to radio broadcasts, the overall range of news and current affairs content in plain language remains limited.

Artificial intelligence can be used to translate text into plain language or easy language—at least in theory. To date, however, no media service has stated that they are using or intend to use a product of this kind.

### 3.2.5.2 Subtitles

Subtitling provides a written version of spoken-word elements such as dialogue and (on-/off-camera) commentary, as well as music and sound effects. In this way, subtitles provide details of content that would otherwise be heard. Depending on the method used, subtitles can either be hardcoded directly into the video and therefore permanently visible or can be activated as required. Digital subtitling is an especially versatile approach and is thus becoming increasingly widespread.

It is interesting to see how subtitling is a measure focused on by all media service providers. Within programmes, subtitles are made available in various formats, including teletext subtitles, subtitles hardcoded into video material or live (real-time) subtitles.

Reports from media service providers increasingly highlight the benefits of using AI-generated subtitles. Easy to generate, subtitles are therefore inexpensive. On the other hand, providers do mention problems such as excessive latency or the difficulties subtitling tools have with dialect speech. Last but not least: AI-generated subtitles are mere transcriptions and do not meet applicable subtitling standards (use of colours, etc.).

A common set of subtitling guidelines that address teletext and DVB subtitling at the preproduction stage were published for the German market in 2013. These guidelines are recommended by the Austrian Association of the Deaf (ÖGLB) and the Austrian Council of Associations for Hearing Loss (ÖSB).<sup>16</sup> In January 2015, public television broadcasters in Austria, Germany and Switzerland agreed on a set of uniform standards for subtitling.<sup>17</sup> These encompass a series of basic principles for the presentation of subtitles in German-speaking countries, relating to aspects such as format, font size, colours and overlays.

15 Austrian Standards International "Plain language. Part 1: Governing principles and guidelines"  
<https://www.austrian-standards.at/de/shop/onorm-iso-24495-1-2025-01-15~p4009154> (accessed on 8 April 2025)

16 Untertitelrichtlinien.de, "Common subtitling guidelines for German-speaking countries" (in German)  
<http://www.untertitelrichtlinien.de/index.html> (accessed on 21 April 2022)

17 P. Chojnacki et al.: "Subtitling standards at ARD, ORF, SRF, ZDF" (in German)  
[http://www.untertitelrichtlinien.de/pdf/Untertitel-Standards\\_ARD\\_ORF\\_SRF\\_ZDF\\_Version\\_1.3.pdf](http://www.untertitelrichtlinien.de/pdf/Untertitel-Standards_ARD_ORF_SRF_ZDF_Version_1.3.pdf) (accessed on 21 April 2022)

### 3.2.5.3 Sign language<sup>18</sup>

Sign language is an officially recognised language based on a visual-manual modality that is used by people with hearing impairments to communicate with one another. The language employs a combination of gestures, facial expressions and bodily posture. Many distinct sign languages exist as well as many dialects. For children who grow up signing, sign language is their native language.<sup>19</sup>

Two media service providers mentioned the use of Austrian Sign Language (ÖGS) in their 2025 annual reports but did not provide figures. Aside from these providers, only the ORF offers a channel with ÖGS, which focuses mostly on news and current affairs.

#### 3.2.5.3.1 Sign language interpreters

Sign language interpreters, if used at all, are typically brought in to interpret for news programmes and press conferences.

The following points should be considered for their use:

- Camera positions should give a full view of the sign language interpreter, so that both hands are easily visible and cannot be cut off during the broadcast as a result of problematic angles.
- Ideally, a single camera will be used to cover the sign language interpreter and speaker so that they will stand next to one another. A bright background is also useful to make the interpreter's movements more easily visible.
- As an alternative, the interpreter can be shown in a box overlay, which should take up at least 25% of the screen area.
- Interpretation should also be simultaneous. If delayed, information is often lost.<sup>20</sup>

An increased use of sign language interpreters would be very welcome since this would achieve a greater degree of inclusion.

#### 3.2.5.3.2 Signing avatars

The Austrian Association of the Deaf has published a guideline for signing avatars on its website at <https://www.oeglb.at/leitfaden-fuer-gebaerdensprach-avatare/> (in German).

Briefly summarised, it can be said that, while the association does not reject the use of such avatars, it does take a critical view. In particular, such avatars are not a substitute for human sign language interpreters. Criticisms raised include the lack of facial expressions and cultural context, which avatars cannot convey as well as their human counterparts.<sup>21</sup>

More information about the research project and the guideline is available from <https://avatar-bestpractice.univie.ac.at/> (in German).

18 Austrian Association of the Deaf (ÖGLB): "Welcome!" (in German) <https://www.oeglb.at/> (accessed on 21 April 2022)

19 ÖGSDV: "Deafness and sign language" (in German) <https://www.oegsdv.at/web/ gehoerlosigkeit-gebaerdensprache/> (accessed on 2 May 2022)

20 Presentation given on 30 June 2021 by Helene Jamer, accessible from <https://www.youtube.com/watch?v=K7di95kQTZA&t=3s> (accessed on 21 April 2022)

21 Oeglb.at: 'Statement from the Austrian Association of the Deaf (ÖGLB) on the avatar at the Danube Island Festival and on Austrian Sign Language (ÖGS) vocabulary used by hearing people' (in German) <https://www.oeglb.at/stellungnahme-des-oeglb-zu-avatar-am-donauinselfest-und-oegs-vokabeln-von-hoerenden-personen/?hilit=Avatar>

### 3.2.5.4 Audio description

Rather like an audiobook, audio description means audibly communicating imagery that makes visual material comprehensible for people with vision impairments.

Provided on an extra audio channel, an audio description helps people with vision impairments to follow visual content by describing visual aspects of the action that takes place and its setting, as well as the appearance of individuals, and their facial and bodily gestures.<sup>22</sup> The accessibility benefits provided by audio descriptions do vary widely according to the material, however: if the spoken word predominates or the content is itself acoustic in nature—as it is with documentaries—then an audio description is not necessarily the tool of choice.

Alongside the ORF, two media service providers mentioned the use of audio descriptions, although one provider did not provide figures in the annual report.

In an understanding signed between the ARD, the ORF, the SRF, the ZDF, Deutsche Hörfilm GmbH, Hörfilm e.V. and audioskript, the basic principles to follow when preparing audio descriptions is set out. The various providers have supplemented this document with their own, more individual rules.<sup>23</sup>

#### 3.2.5.4.1 Dual-channel mode

Dual-channel mode is an audio transmission technique whereby two separate audio channels are broadcast simultaneously. One of the two audio channels can be used to provide an acoustic description of the broadcast image, allowing especially people with vision impairments to use audiovisual media content.

Apps are also available that give users access to an audio description. The GRETA app provides access to audio descriptions and subtitling, as was mentioned in one of the action plans.

#### 3.2.5.4.2 Synthetic voice audio description

With this type of audio description, the visual content is not described by a human voice but by a synthetic (artificial) voice instead. These artificial voices are now sounding increasingly lifelike.

22 [Blindenverband.at](https://www.blindenverband.at/de/aktuelles/865/Adiodeskription): "Audio description. Still plenty needs to be done" (in German) <https://www.blindenverband.at/de/aktuelles/865/Adiodeskription> (accessed on 21 April 2022)

23 [der.orf.at](https://der.orf.at): "Listening to images: video for the blind and partially sighted" <https://der.orf.at/kundendienst/service/audiodeskription104.html> (accessed on 18 March 2025)

## 3.3 2025 survey of reach and market shares<sup>24</sup>

### 3.3.1 Overview

To implement the provisions of the Audiovisual Media Services Act (AMD-G) as part of legal supervision, Art. 65 of the act requires a survey of the reach (market shares), coverage levels, and user and viewer figures.

Market research has been carried out annually in accordance with these provisions since 2020 and was duly completed in 2026 for the 2025 calendar year. As part of the survey, all providers were queried about reach (market shares), coverage levels and user and viewer numbers.

#### Survey method

A total of 454 providers were sent requests, including 147 television broadcasters, 168 providers of on-demand services, 80 radio broadcasters and 152 cable network operators. The survey considered all services that were listed in the KommAustria directory as of 9 January 2026 and active during the 2025 calendar year. This basic group surveyed was expanded by eight television channels, 29 on-demand services and 22 radio stations and one cable network during the 2025 calendar year. During the same period, seven television channels and 23 on-demand services discontinued service, as did 14 radio stations and seven cable networks.

The survey entailed the questions listed below.

#### Television channels:

- What was the average daily reach of the television channel as a percentage of the 12+ target group (Monday to Sunday) in the previous calendar year?
- What was the average market share of the television channel as a percentage of the 12+ target group (Monday to Sunday) in the previous calendar year?

#### On-demand services:

- How many users (subscribers or individual customers) did the on-demand service have on average in the previous calendar year?
- How frequently was the on-demand service requested in the previous calendar year?

The data presented in this document are based on the information supplied directly by the service providers. The figures may thus relate to varying reference values (such as coverage areas), depending on the service. Correspondingly, the responses given by the service providers are as a whole comparable only to a limited extent.

#### Data validity

KommAustria cannot verify the validity of the raw data. When considering reach and market shares, it is important to note that in practice the survey was not carried out Austria-wide for media services with small regional or local coverage areas. This is because the case numbers (or respondents) in each small coverage area are too low to obtain any useful data. To achieve valid results that also include small coverage areas, much larger case numbers in Austria-wide surveys would be needed, or else usage reports would have to be commissioned for each and every regional or local coverage area. Neither variant is economically viable for media services providers.

<sup>24</sup> (as of 20 April 2026)

### 3.3.2 2025 market report

The data queried pursuant to Art. 65 AMD-G can be grouped under three categories:

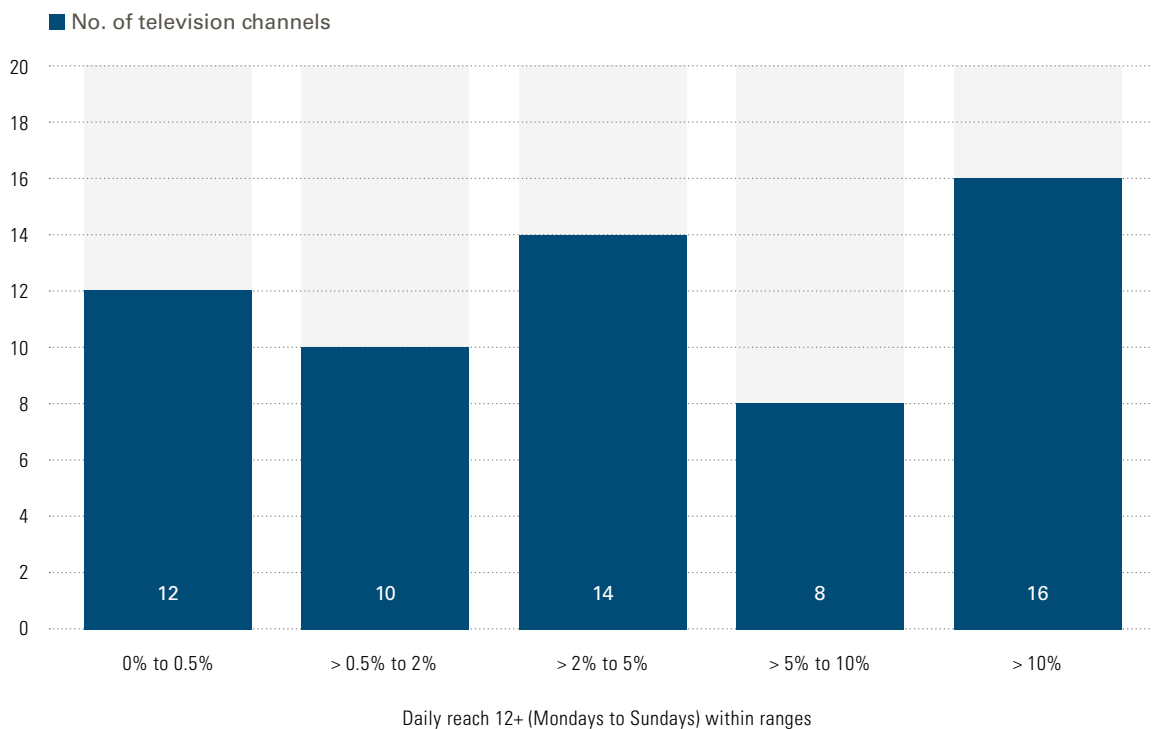
- Television channels
- On-demand services
- Cable networks

To represent the broadcasting market in its entirety, selected data relating to radio broadcasting are also provided. This is based on voluntary information provided by radio broadcasters.

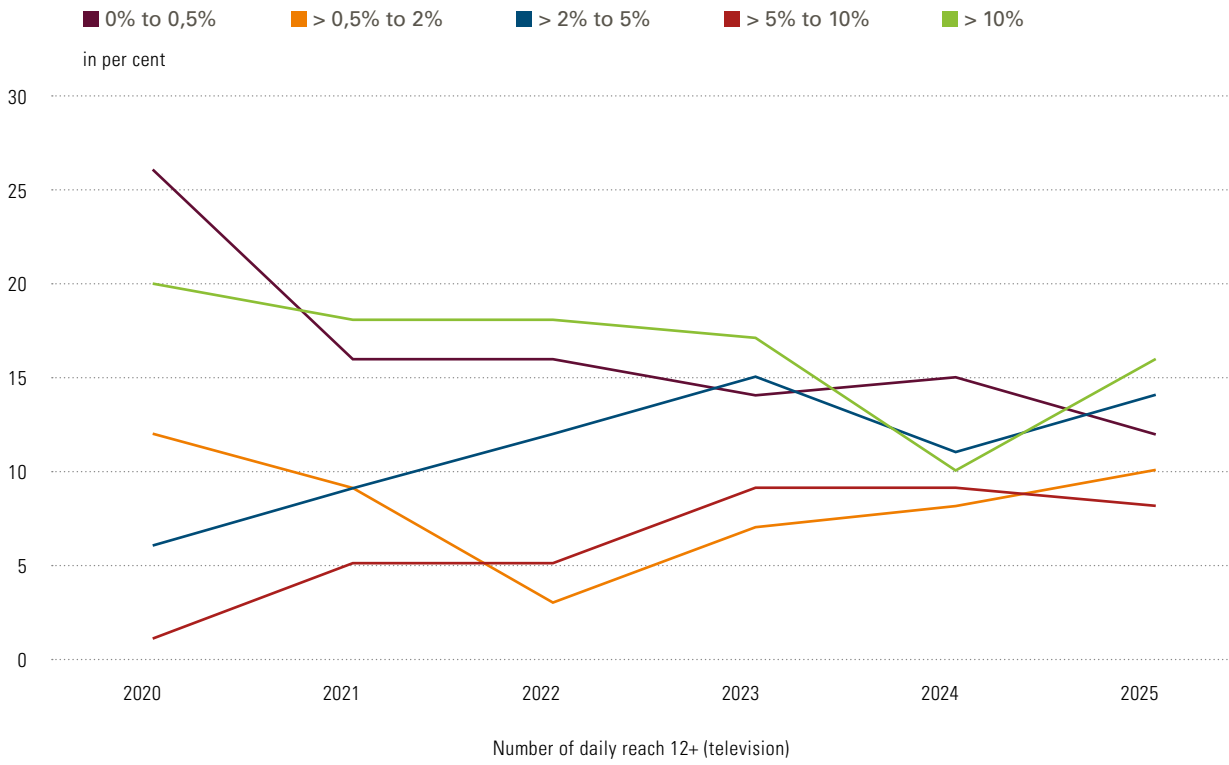
#### 3.3.2.1 Television channels

For television channels, the daily reach and the market share was queried in the 12+ target group for Mondays to Sundays. The diagrams included here display the reported information as a bar chart divided into ranges. The data encompass television channels with nationwide as well as local and regional coverage, while the specified reach and market shares refer to the particular television broadcaster’s coverage area. As such, the data are comparable only to a limited extent.

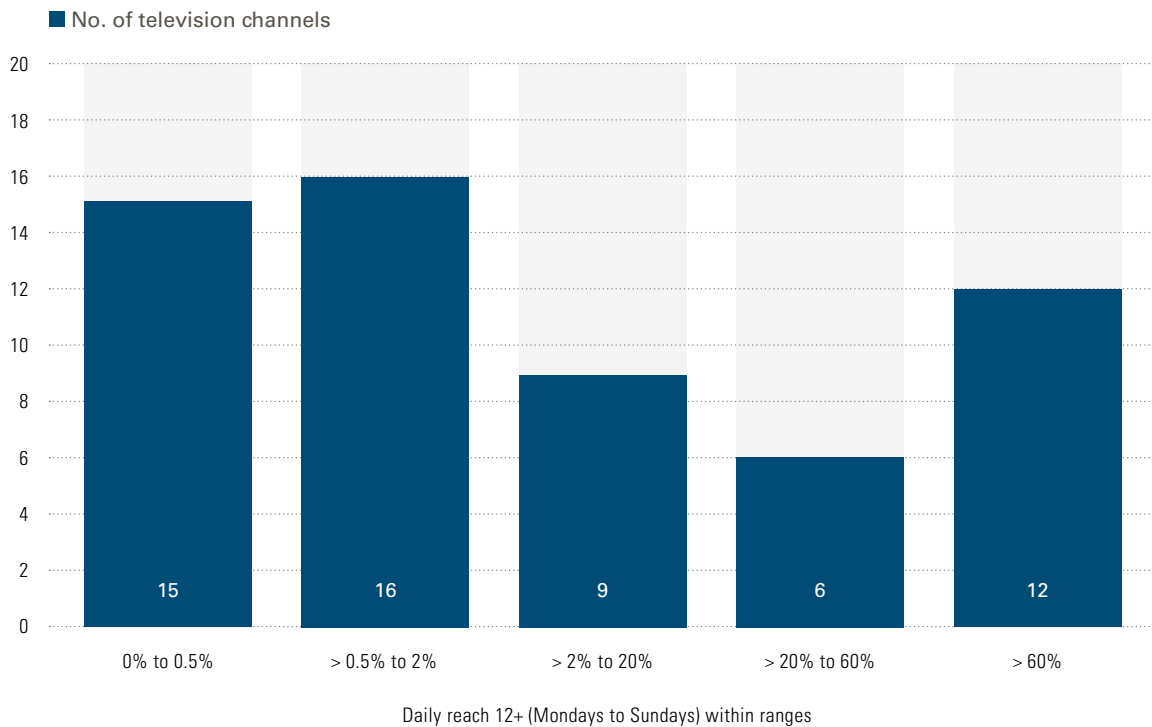
**Figure 05: Number of television channels within specified daily reach ranges among viewers 12+ in 2025 (no data exist or are available for 181 providers)**



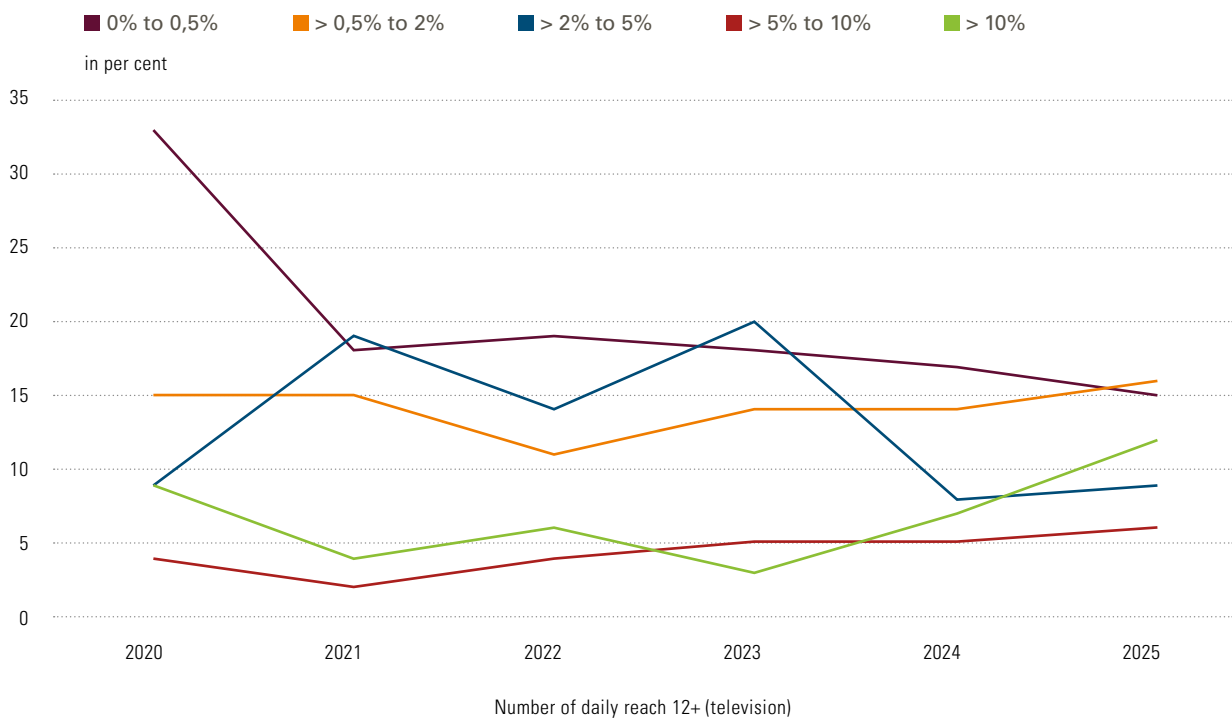
**Figure 06: Year-on-year comparison of daily reach within specified ranges among viewers 12+ (2020-2025)**



**Figure 07: Number of television channels within specified market share ranges among viewers 12+ in 2025 (no data exist or are available for 183 providers)**



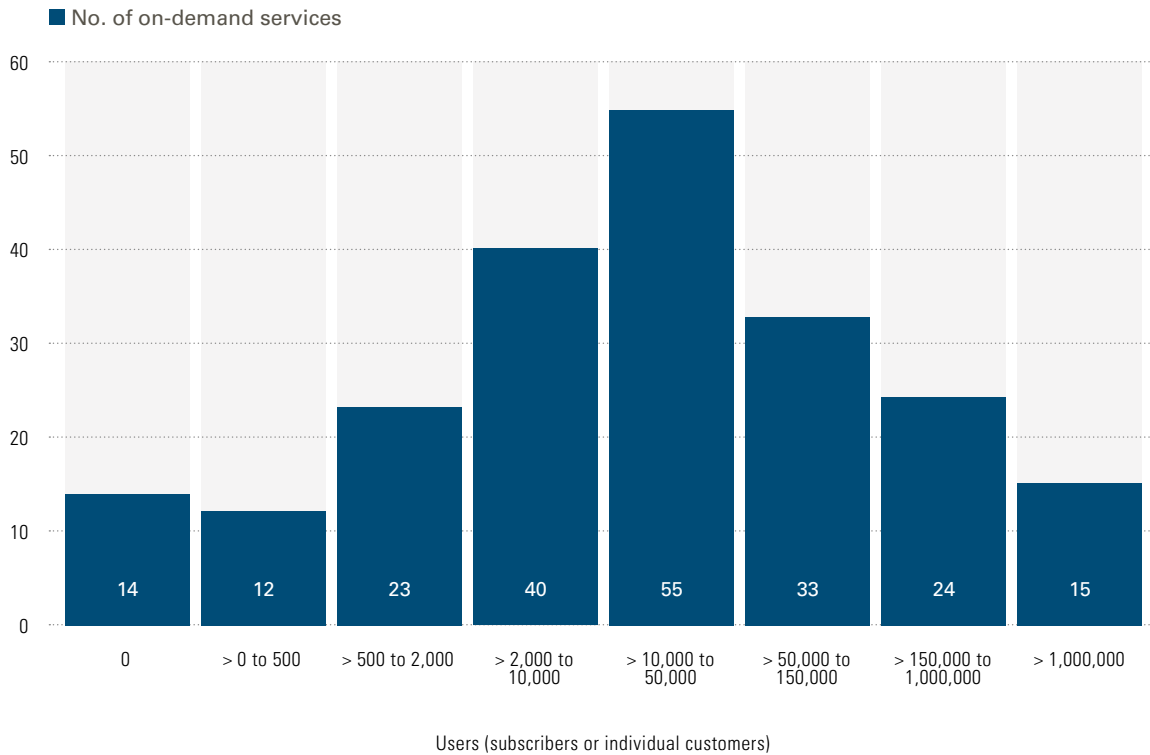
**Figure 08: Year-on-year comparison of market share within specified ranges among viewers 12+ (2020-2025)**



### 3.3.2.2 On-demand services

The group of on-demand services were queried about the numbers of users (subscribers or individual customers) and service requests. As above for television channels, the figures that are reported here are also divided into ranges and displayed as a bar chart.

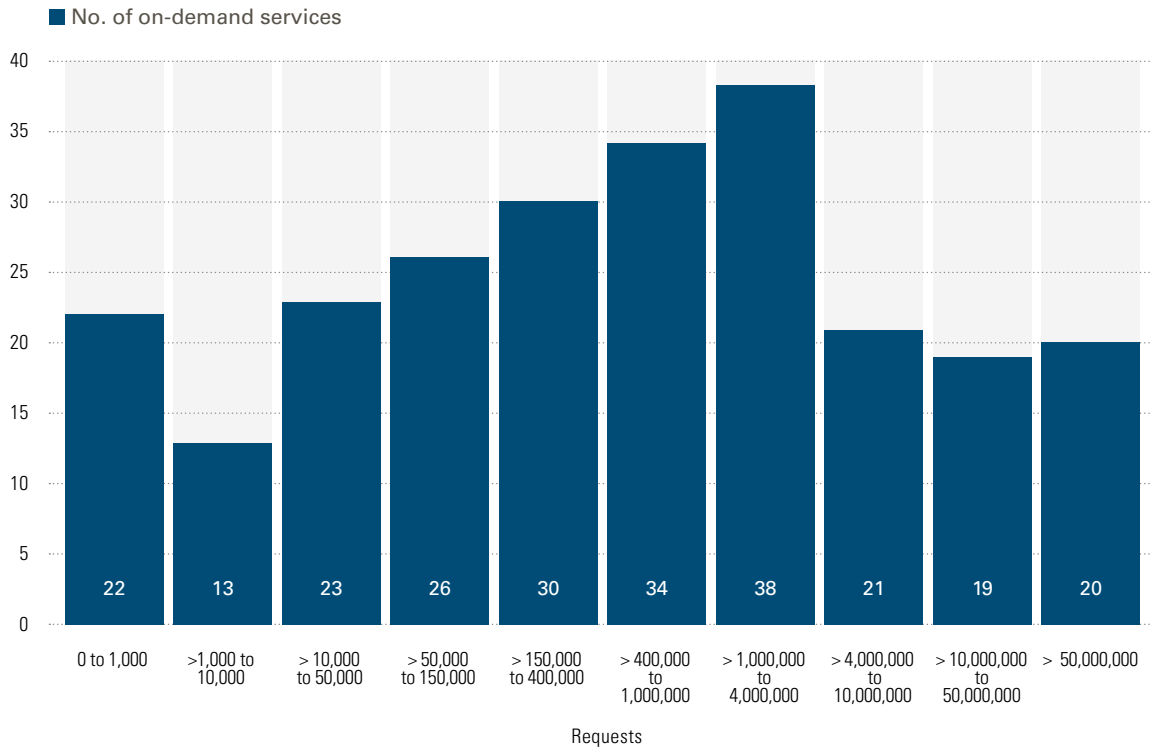
**Figure 09: Number of users (subscribers or individual customers) of on-demand services in 2025 within specified ranges (no data exist or are available for 83 providers)**



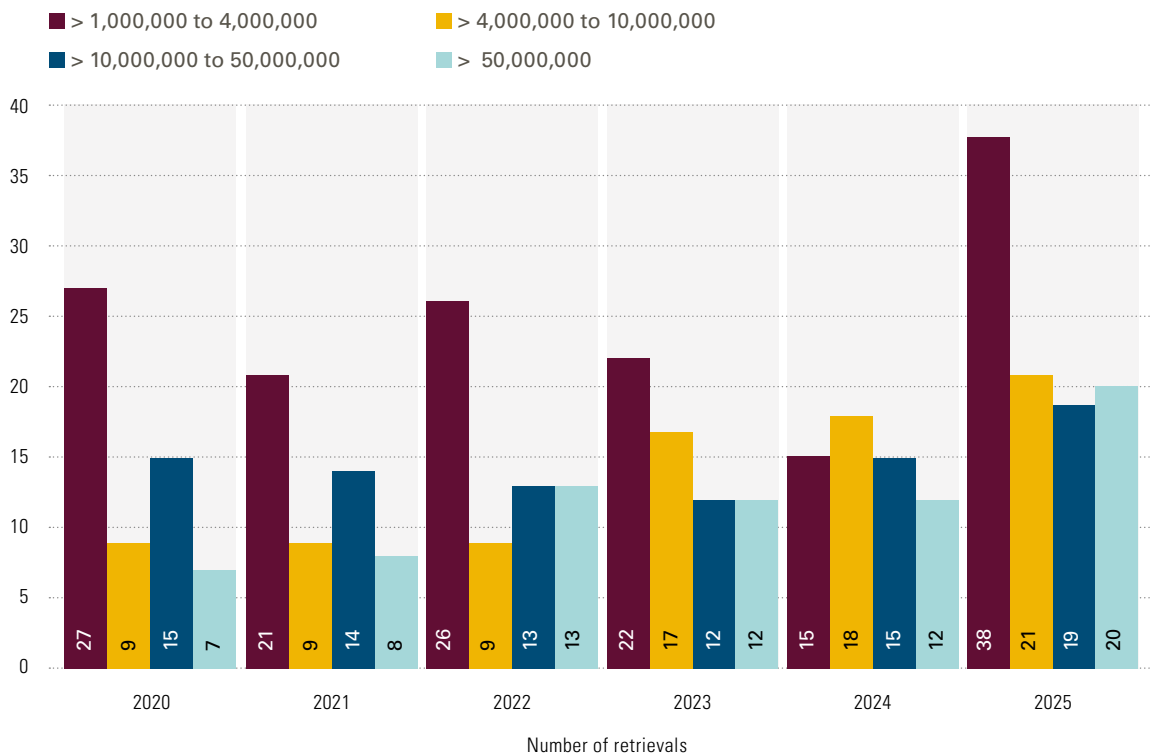
Referring to the chart above, the numbers of users (subscribers or individual customers) in 2024 were as follows:

- 0: 16
- Over 0 and up to 500: 14
- Over 500 and up to 2,000: 27
- Over 2,000 and up to 10,000: 31
- Over 10,000 and up to 50,000: 31
- Over 50,000 and up to 150,000: 24
- Over 150,000 and up to 1 million: 17
- Over 1 million: 14
- No data existing/available: 84

**Figure 10: Number of requests (2025) (grouped by range)**  
(no data exist or are available for 53 providers)



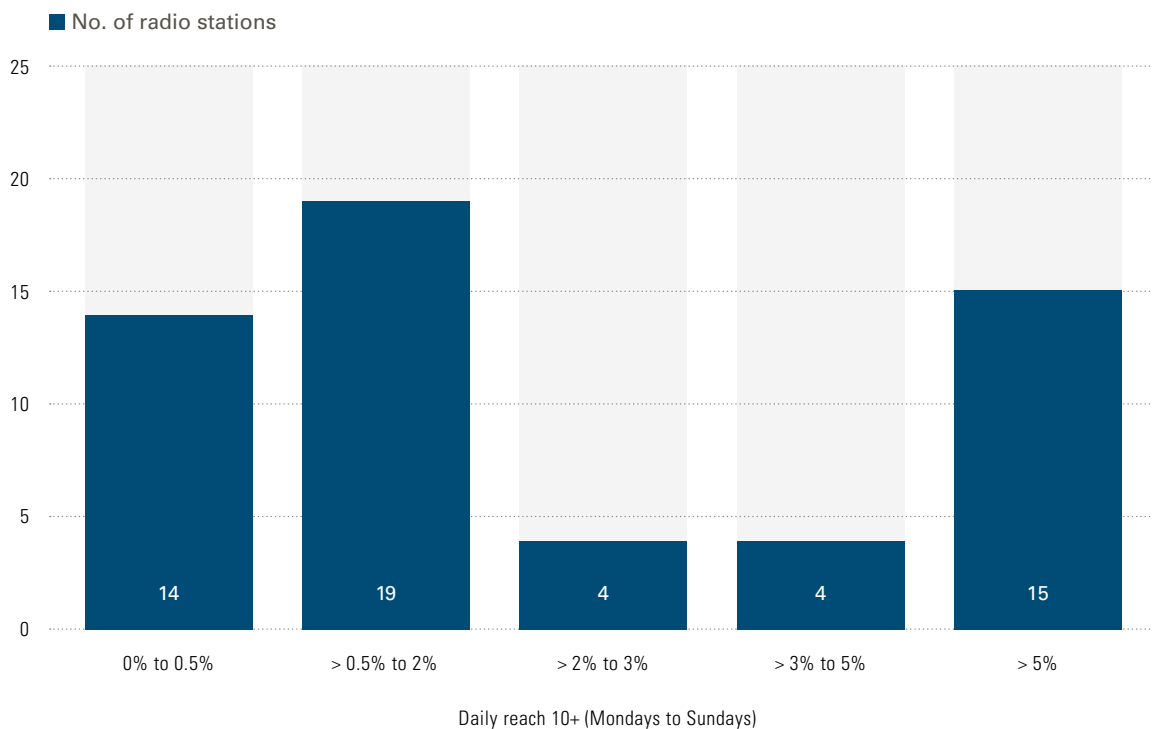
**Figure 11: Year-on-year comparison of service requests in 2025 within specified ranges**



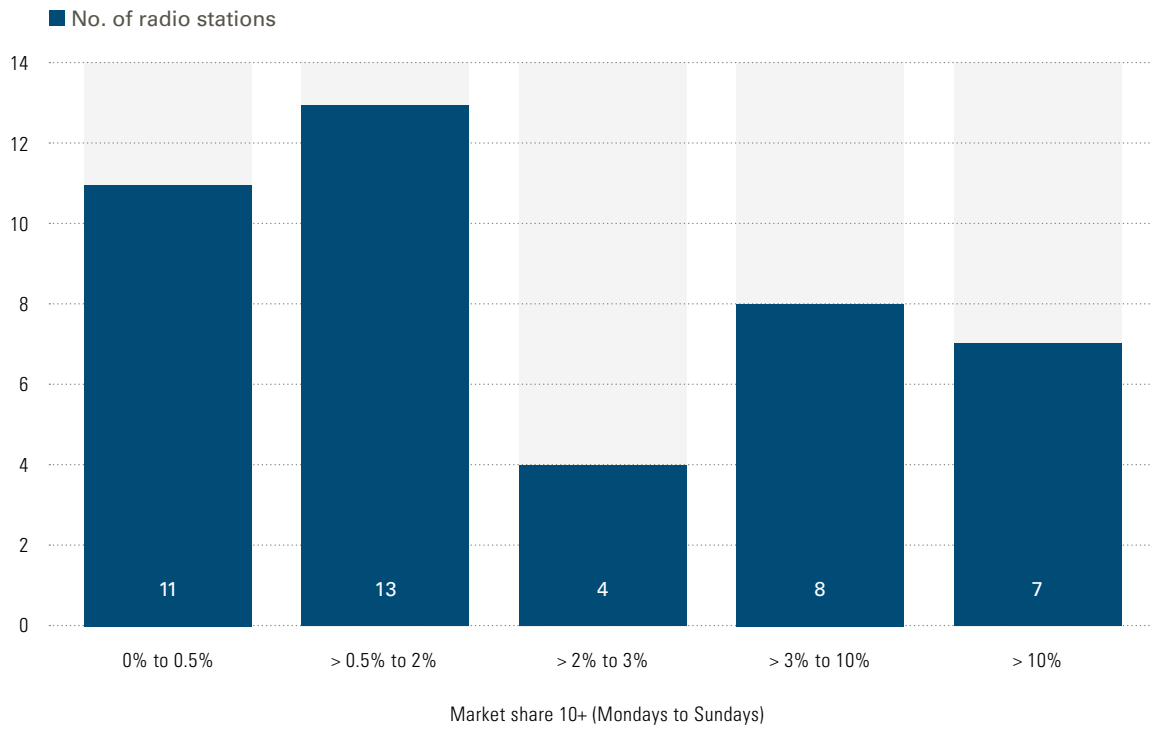
### 3.3.2.3 Radio stations

Daily reach and market shares were surveyed in the radio station category; for the bar chart presented, the daily reach and market shares were specifically queried among the 10+ target group for Mondays to Sundays. The information is also presented here as a diagram showing the reported data broken down into ranges. The data include radio stations with nationwide as well as local and regional coverage, while the reach and market share specified in each case refer to the particular radio broadcaster's coverage area.

**Figure 12: Number of radio stations within specified daily reach ranges among listeners 10+ in 2025 (no data available for 66 providers)**



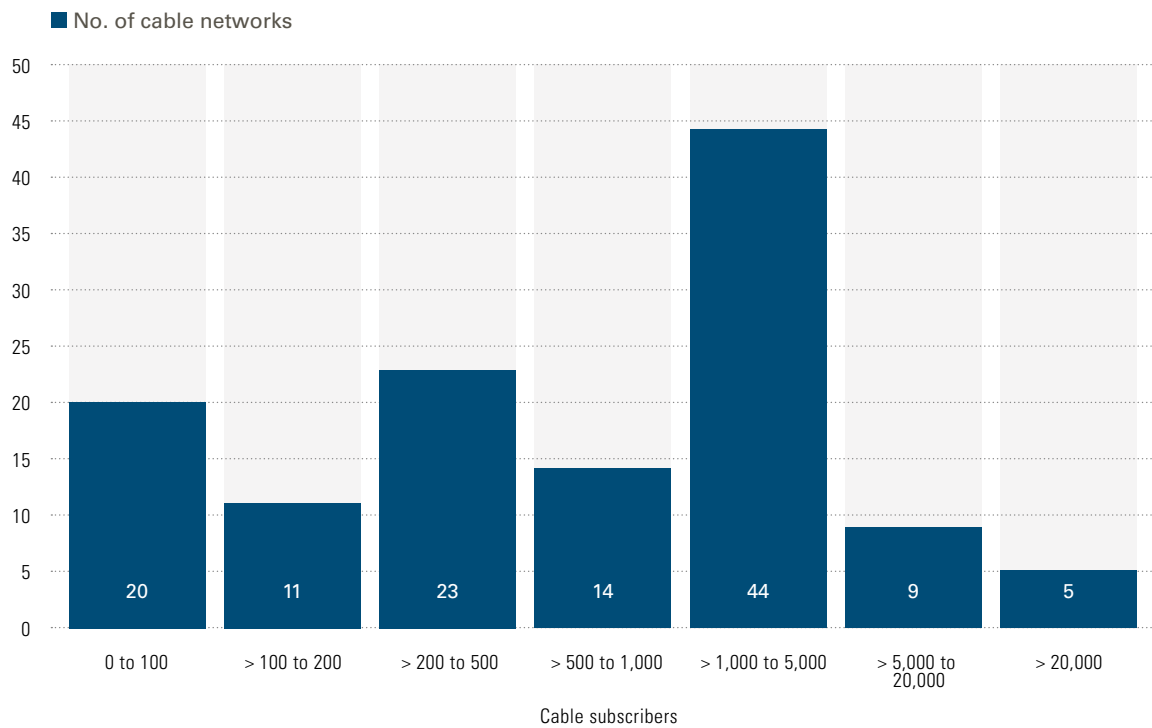
**Figure 13: Number of radio stations within specified market share ranges among listeners 10+ in 2025 (no data available for 79 providers)**



### 3.3.2.4 Cable networks

Cable network providers were queried about the number of subscriptions. The relevant figures were here also divided into ranges, with the bar chart included below created on this basis.

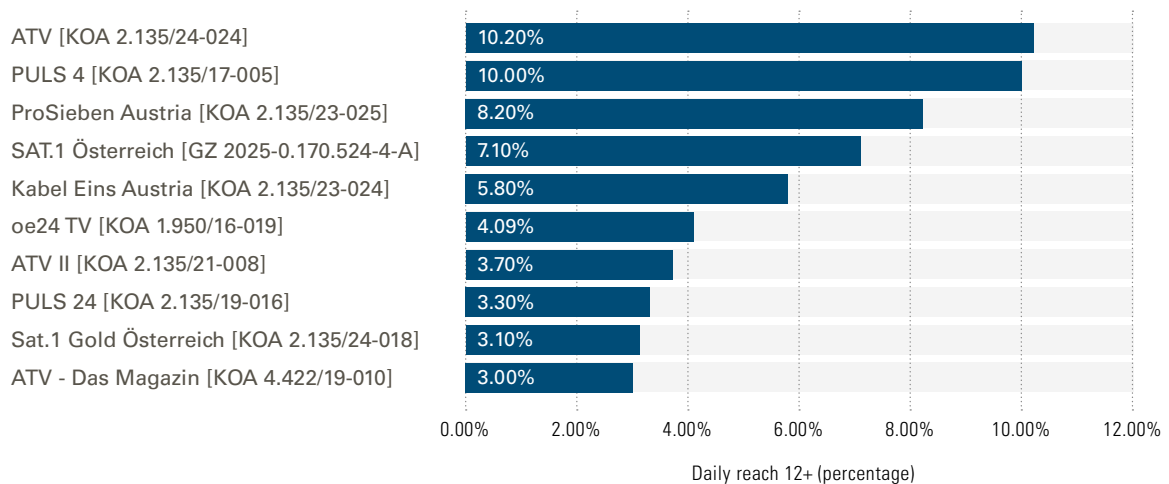
**Figure 14: Number of cable networks within subscription ranges in 2025**



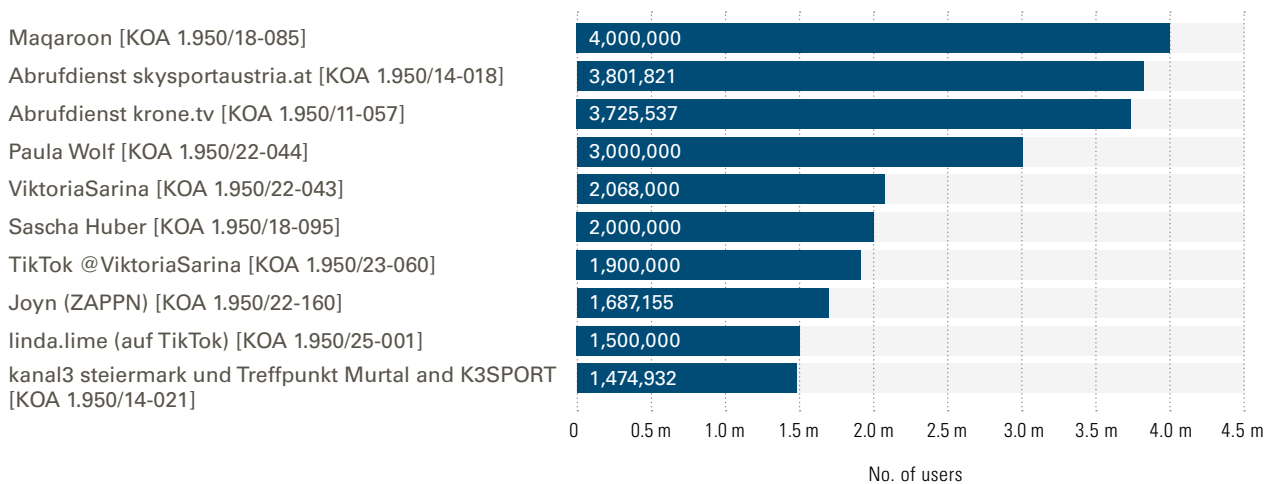
### 3.3.3 Selected detailed results

In addition, survey results were singled out from the various areas by way of example. These are presented here for 2025 as a whole. Note that the information presented here is based on the figures provided directly by the service providers.

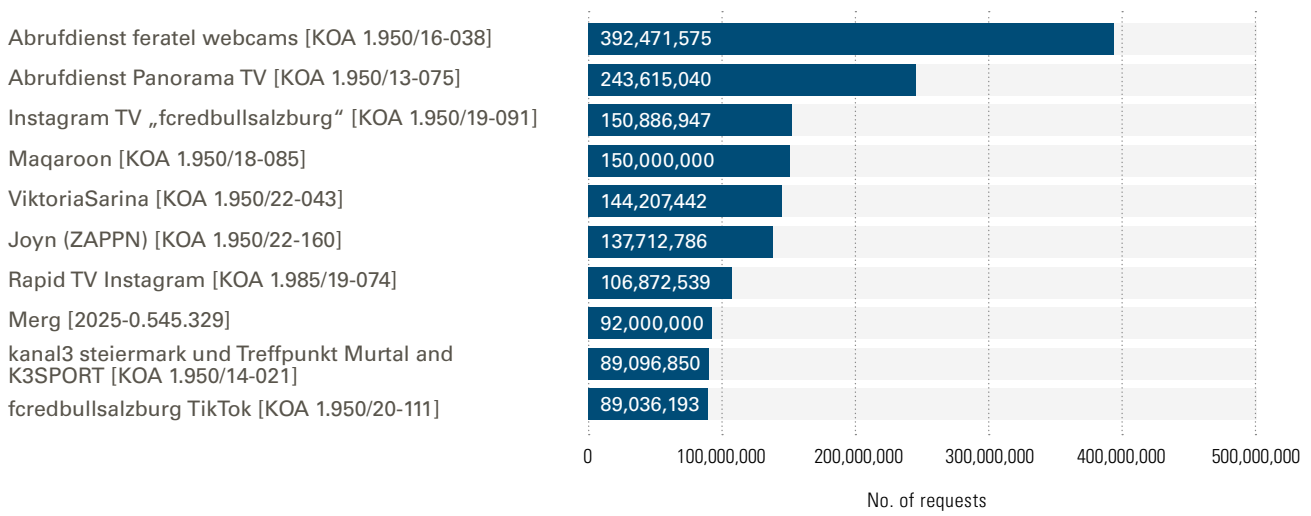
**Figure 15: Top 10 nationwide television channels by daily reach as a percentage of viewers 12+ in 2025**



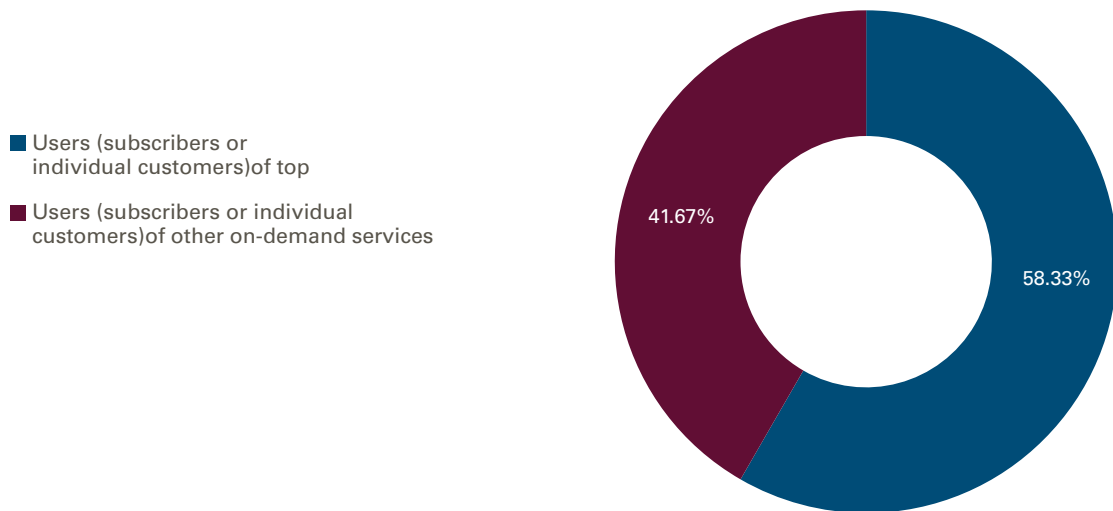
**Figure 16: Top 10 on-demand services by number of users (subscribers or individual customers) in 2025**



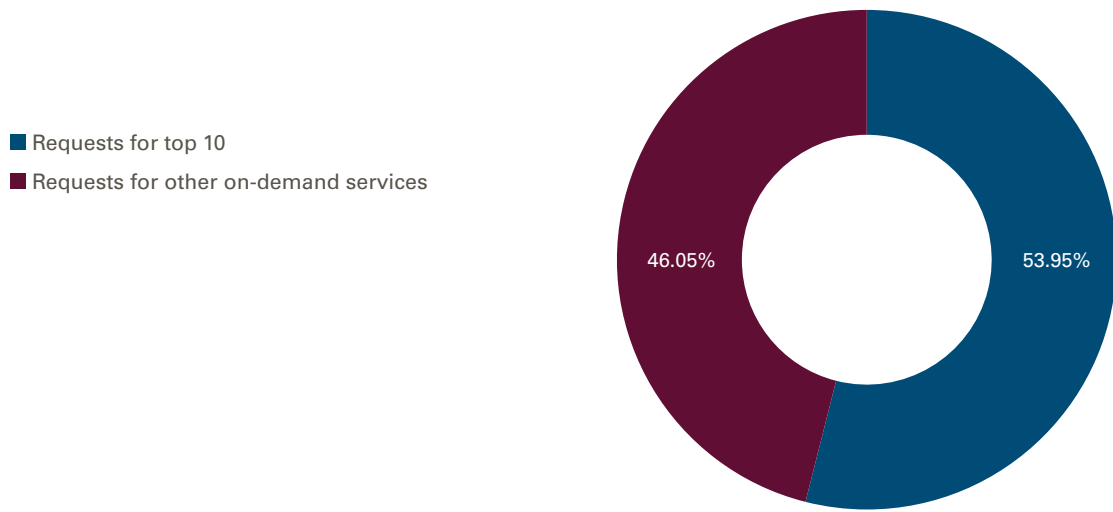
**Figure 17: Top 10 on-demand services by service requests in 2025**



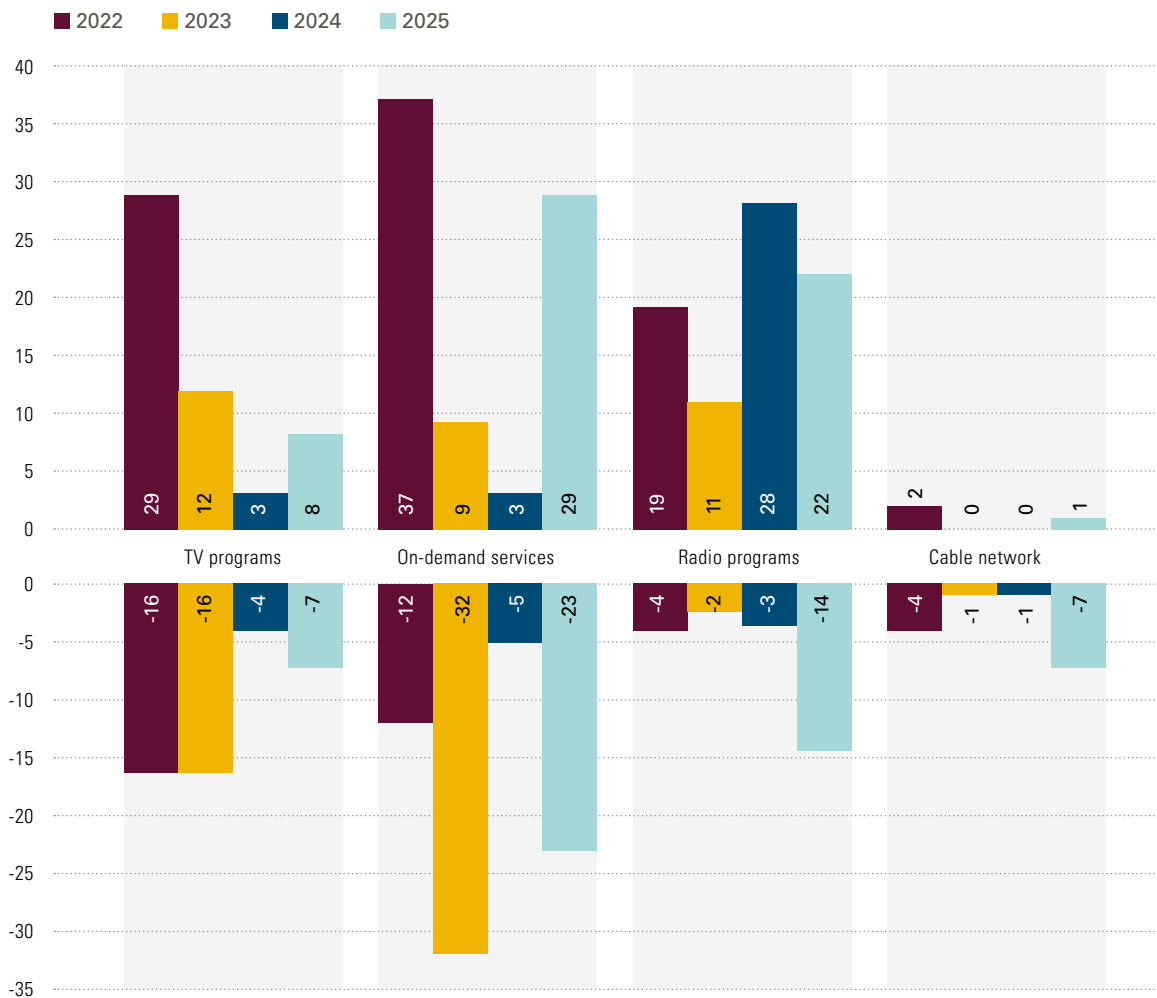
**Figure 18: Percentage share of users (subscribers or individual customers) of the top 10 on-demand services as compared with the share of users (subscribers or individual customers) of other on-demand services in 2025**



**Figure 19: Percentage share of service requests to the top 10 on-demand services as compared with requests to other on-demand services in 2025**



**Figure 20: Services introduced and terminated (2022-2025)**



### 3.3.4 Link to presentation of full survey results

All survey results for the categories of television and on-demand services are available (in German) on the RTR website at <https://www.rtr.at/Reichweiten-undMarktanteilerhebung2025>

The following information is listed:

**Television:** provider, service, period (from/to), daily reach 12+ (in %), market share 12+ (in %)  
**On-demand services:** provider, service, period (from/to), number of users  
(subscribers or individual customers), number of requests

Again, we need to point out that the figures presented are based on information directly provided by the service providers, while the data relating to reach and market shares in each case refer to the specified service provider's coverage area.

## 3.4 Digitisation in broadcasting: update

### 3.4.1 Digital linear television

Conventional, linear television channels are broadcast in Austria solely by means of digital technologies via satellite, cable networks and antenna (terrestrial). To present the extent to which the three reception modes are used in Austria in 2025, this Communications Report refers to the number and percentage of people who watch the television channels that are broadcast via satellite, cable and terrestrial television. The method previously used by TELETEST for collecting linear and time-shifted television viewing data was changed in 2024. TV households are no longer included in the figures, only the number of TV viewers. The TELETEST survey, which has been commissioned by the TELETEST Working Group (AGTT) since 2007, provides viewing data for TV channels available in Austria. In September 2024, the name of the project was amended to TELETEST 2.0 in response to the aforementioned change in methodology.

The AGTT is a collaboration between Austrian television broadcasters and their advertising slot marketers. The group commissioned market research institute GfK Austria (TV panel/data production/data integration) and TV-Insight GmbH (HbbTV measurement and projection) with the survey. GfK Austria's TELETEST panel derives data via TV-Insight (TVI) from a representative sample of the Austrian population (with around 1,505 TV households and roughly 3,325 people aged three and over) using devices that are connected to receivers. These data are then merged with the feedback channel data from over 1.1 million online HbbTVs<sup>25</sup> in Austria.<sup>26</sup> As a result, TELETEST 2.0 provides personal viewing data—accurate to the second—for linear and time-shifted television viewing.

According to information from the AGTT, 7.546 million Austrians aged twelve and over were residing in Austrian television households in 2025.

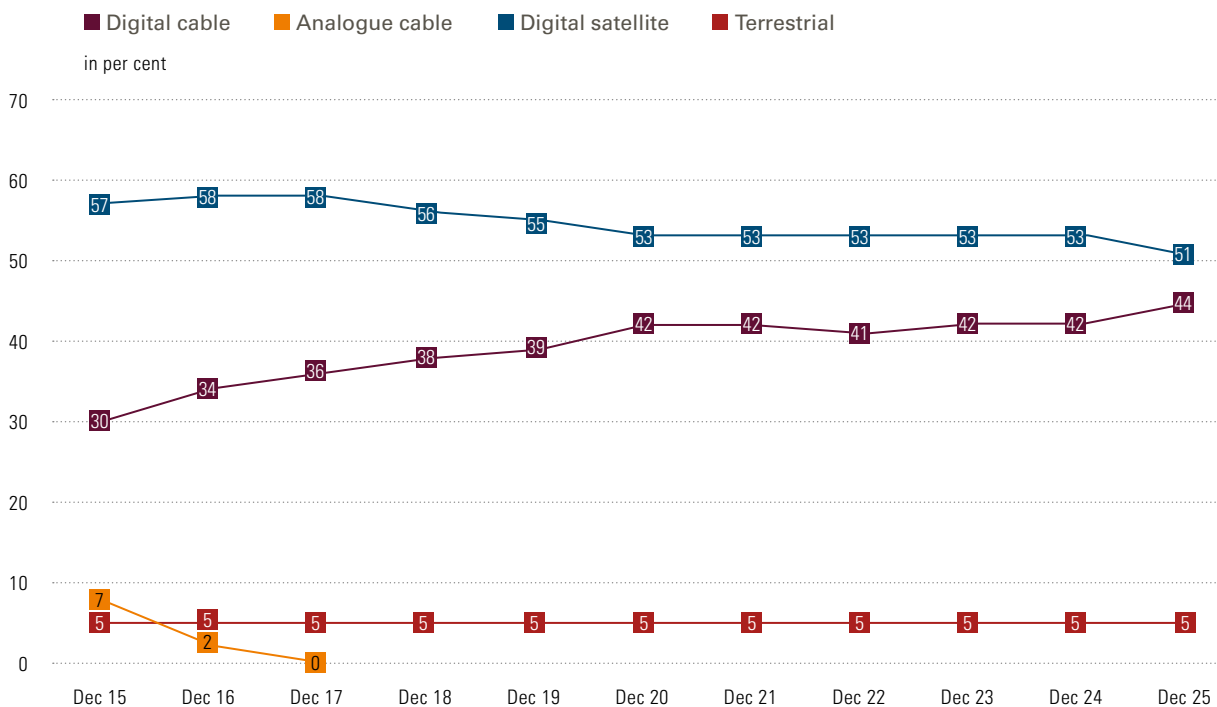
#### 3.4.1.1 Distribution of conventional television reception modes among television users

Television reception via satellite lost around 2% of users in 2025 compared with the previous year, with these viewers switching fully to cable reception. This marks a new record for the cable reception mode and an all-time low for satellite reception. Terrestrial television (DVB-T/DVB-T2 or digital terrestrial television) also experienced a slight decline in the total number of users, although this was only marginal. As a result, the percentage distribution of the TV-viewing population over the three reception modes changed significantly for satellite and cable, whereas DVB-T/DVB-T2 remained stable.

<sup>25</sup> HbbTV: Hybrid Broadcast Broadband TV, middleware platform, open, international standard

<sup>26</sup> Information available at <https://www.agtt.at/>

**Figure 21: Use of TV reception modes (broadcasting), persons aged 12+ as a percentage, 2015–2025**



Source: ATT TELETEST 2.0 (from 1 September 2024), AGTT / GfK TELETEST (up to 31 August 2024); Evogenius M<sup>3</sup>; 2015-12-01 to 2025-12-31; weighted by person; including VOSDAL/Timeshift; TV time interval

### 3.4.1.2 3.871 million people (51%) live in households with satellite reception

At year's end 2025, around 3.87 million Austrians aged twelve and over were residing in television households with satellite reception (2024: 4.027 million; 2023: 3.997 million). This corresponds to a decrease of 156,000 residents compared with the previous year. This means that the percentage of the viewing population living in satellite television households dropped by two percentage points to 51%.

### 3.4.1.3 3.321 million people (44%) watch cable TV (including IPTV)

The percentage of television viewers aged twelve and above with a cable connection as their TV reception platform increased by two percentage points to reach 44% compared with the previous year. The absolute figure for cable viewers increased by 157,000 to approximately 3.32 million people (2024: 3.164 million, 2023: 3.195 million). The cable reception mode achieved historic record figures as a result.

Cable TV providers supply connected households either via the transmission technology DVB-C or via streaming signals based on the internet protocol (IPTV).

#### 3.4.1.4 354,000 people (5%) use terrestrial TV reception

In 2025, around 354,000 people aged twelve and over lived in TV households where exclusively terrestrial television—reception via a room or roof antenna—was viewed (2024: 355,000; 2023: 354,000). This translates to an unrounded figure of 4.7% of the viewing population.

Both the number of terrestrial television users and the percentage of the viewing population living in terrestrial TV households in 2025 has remained virtually constant since 2023. However, the number of exclusively terrestrial TV users is clearly following a downward trend over the long term. The most recent significant drop in the number of people was in 2023, by 25,000 to 354,000 (2022: 379,000, 2021: 375,000).

#### 3.4.1.5 With second devices also counted, 557,000 people (7.4%) use DVB-T/-T2

As of the end of 2025, the number of people aged twelve and over who used digital terrestrial television as their primary or only form of TV reception was down by just 1,000. Yet the number of residents of satellite and cable households who have access to terrestrial television as a supplementary reception platform increased somewhat more significantly by 5,000 users.

In most cases, DVB-T/-T2 is mainly used in cable or satellite householders to view local television channels that are only transmitted in terrestrial mode, or as a simple solution to add a second device to another room. At the end of 2025, this applied to 160,000 people in satellite TV households (2024: 159,000, 2023: 157,000) and to 43,000 people in cable TV households (2024: 48,000, 2023: 24,000). If this figure is added to the number of people in terrestrial-only television households, this results in a total of 557,000 people (2024: 562,000, 2023: 535,000) with potential terrestrial TV reception. This translates to 7.4% (2024: 7.4%; 2023: 7.1%) of the 7.546 million TV viewers in Austria and is equivalent to the data from 2024.

#### 3.4.1.6 Coverage level of digital terrestrial television (DVB-T/-T2)

##### Multiplexes A, B, D, E and F—nationwide programme portfolio

Digital terrestrial television is transmitted in data streams, each consisting of several TV channels. Multiplexes are used to encode the channels into bundles. In Austria, five such multiplexes broadcast the TV channels with nationwide reception (multiplexes A, B, D, E and F) using various ranges within the available spectrum. Additional nationwide coverage is provided on a regional basis (multiplex C). In this way, programme portfolios with a regional or local focus are provided to coverage areas. In Austria, a total of around 70 TV channels can be received in digital terrestrial mode via a room or roof antenna.

The technical range of the nationwide multiplex A (DVB-T2) is at a level of 98% of the population. The technical range for the other nationwide DVB-T2 multiplexes B, D, E and F is roughly 92% of the population. Potentially receiving programming by various operators and varying from region to region, 64% of the population also live in the multiplex C reception area (MUX C, DVB-T and DVB-T2).

MUX A and MUX B are used for nationwide transmission of the channels 3sat, ATV, ORF 1, ORF 2 Regional (three editions in five regional reception areas), ORF III, ORF SPORT+ and ServusTV, free of charge<sup>27</sup> and in high definition (HD) resolution, as well as ATV2, PULS 4 and RTL Austria in SD resolution. With Puls 24 (in SD), an additional channel of Austrian origin is being broadcast free of charge and nationwide within the MUX F station line-up, and this can be received following registration.

27 Registration with the multiplex operator required

As part of a payable overall package, the D, E and F multiplexes encompass roughly 40 additional TV channels, including most of the widely known public and private offerings from Germany (in HD or SD resolution) as well as a few pay TV channels.<sup>28</sup>

#### **Multiplex C—regional programme portfolio**

The supra-regional and international programme portfolio carried nationwide by the A, B, D, E and F multiplexes is supplemented by the private regional channels that are transmitted via the 16 MUX C broadcasting locations in the provinces. With programmes largely dedicated to reporting from the respective regions, these channels make an important contribution to democratic discourse.

At some MUX C locations in larger agglomerations, additional supra-regional stations originating in Austria are also broadcast alongside German and international stations.

Details on the party licensed to operate each of the regional multiplexes (MUX C) and the TV programmes broadcast via that platform are available (in German) at <https://www.rtr.at/medien/service/verzeichnis/mux/MUXC.de.html>.

### **3.4.1.7 5G broadcasting trials**

Towards further progress in digital broadcasting, and to test broadcasting applications based on the 5G transmission standard, KommAustria had approved in November 2019 an initial related pilot study, to be carried out in the Vienna area by Österreichische Rundfunksender GmbH & Co KG (ORS). After one extension, the trial ended in April 2021. A second phase was launched in 2021 and completed at the end of 2024. A final report was presented in the first quarter of 2025. The broadcasting trial was funded by the Digitisation Fund set up by the RTR Media Division.

To receive linear radio and television programmes being transmitted via 5G broadcast, consumers require only the antenna integrated in their 5G-ready user device, but not a SIM card or internet access.<sup>29</sup> The signals are transmitted within broadcasting frequency ranges and not mobile bands. Users' mobile data volumes are not affected through receiving such broadcasts and there is no added traffic within mobile cells. In this way, highly economical use is made of spectrum when broadcasting information services to mobile devices. 5G broadcast functionality is specified as part of the 5G mobile communications standard; it is supported by every terminal device that is manufactured in full compliance with the 5G specification standards.

In October 2021, project funding by the Digitisation Fund was renewed for '5G broadcast trial operation in Vienna phase 2'. The project was planned for the period 1 July 2021–31 December 2024. Phase 2 of the project focused on continuing to examine the suitability of further enhanced Multimedia Broadcast Multicast Service (feMBMS) and on further standardising LTE-based 5G Terrestrial Broadcast for future use as a potential standard for broadcasting terrestrial signals. feMBMS is a technology based on a specification by the 3rd Generation Partnership Project (3GPP).

In February 2025, a pilot study on improving the efficiency of terrestrial broadcasting was launched as a follow-on project by Österreichische Rundfunksender GmbH & Co KG (ORS). The aim of this study, which will run to the end of April 2026, is to further enhance the 5G broadcast standard and increase its efficiency. The focus is on optimising signal transmission and integrating 5G broadcast with existing technologies. Important aspects of the work include: 1) introducing time-frequency interleaving to make the signal more robust and to improve reception quality; 2) developing CAS muting to utilise free DVB-T2 multiplex capacities for 5G broadcast; 3) testing the interoperability of the transmission technologies from various manufacturers in single frequency networks (SFNs); and 4) analysing stationary reception potential. The project aims to implement innovative approaches to achieve a more efficient use of the UHF spectrum band and to apply the findings to standardisation processes and applications.

<sup>28</sup> Separate surcharge

<sup>29</sup> Previous prototypes, developed only for professional purposes, are not yet available commercially.

By approving 5G broadcast trials, KommAustria recognises that mobile devices are basic tools for access to information on a daily basis and that 5G could play a role in this use case in future. While non-linear online media services provided on demand are gaining ground particularly in the entertainment industry, linear information services continue to dominate news reporting. Taken together, these two observations suggest that, on the one hand, unlimited reception of 5G broadcasts via mobile devices could be easily implemented at a technical level, without any restricting factors. It is also clear that implementation would entail a dimension relating to democratic policymaking in the information society, a factor considered by legislation, specifically Art. 21 of the Audiovisual Media Services Act (AMD-G). This provision calls for the rollout and advancement of digital broadcasting to be enabled and supported for all transmission platforms, while scenarios are to be detailed for the introduction, rollout and advancement of digital broadcasting and multimedia services.

## 3.4.2 Digital terrestrial radio

### 3.4.2.1 DAB+ digital radio

The DAB+ programme portfolio in Austria doubled in 2024 to around 60 radio stations. The first ORF radio station to be broadcast over DAB+ went live shortly before the end of 2025, marking an important next step for digital radio in Austria.

On 19 December 2025, the ORF began the digital terrestrial transmission of its national FM station Ö3 via five regional DAB+ multiplexes in the MUX II coverage areas: 'Kärnten, Steiermark, Südburgenland,' 'Niederösterreich, Nordburgenland,' 'Kärnten, Steiermark, Burgenland,' 'Salzburg, Oberösterreich,' 'Tirol' and 'Vorarlberg.' As it can also be received in Vienna, coverage is consequently nationwide. Officially, the transmission of Ö3 via DAB+ is part of a pilot project aiming to test digital coverage of the major road network and tunnels, as well as automatic switching between DAB+ and FM depending on better signal quality. This will be supplemented in future by testing innovative offerings in traffic broadcasting and systems providing crisis information.

Similarly to FM radio, DAB+ radio service can easily be received via antenna. It is noise-free and can additionally contain image and text information that is visible on receivers with a suitable display. DAB+ devices also support FM reception and are available as car radios, portable radio receivers or as components of hi-fi systems.

With the ordinance entitled "Digitisation Plan 2013", KommAustria dedicated seven coverage areas in band III (174–216 MHz range) to the nationwide and regional rollout of digital radio via the DAB+ transmission standard.

Sixteen DAB+ radio channels with a technical range of 84% of the population have been broadcast using the nationwide MUX I platform since 2019. Since 2018, 14 DAB+ radio stations with a technical range of 2.3 million people have been available regionally in the greater Vienna region via the national coverage provided by the MUX II platform.

In March 2024, KommAustria granted a total of six licenses to Austrian broadcasting network operator ORS comm GmbH & Co KG (ORS) for the construction and operation of new multiplexes for the transmission of DAB+ digital radio stations: this comprised one licence for a nationwide multiplex (MUX III) and five licences for additional regional multiplexes (MUX II). Licenses followed from early June 2024 for the DAB+ digital radio stations broadcast throughout Austria as well as regionally via the new multiplexes. Broadcasting became operative at the end of June 2024.

By the end of 2025, a total of 62 radio stations (2024: 58; 2023: 30) were broadcast via the two nationwide multiplex platforms (MUX I and MUX III) as well as via the MUX II coverage area, divided across six regional multiplexes. Of these, 33 were Austria-wide (2024: 32 stations; 2023:16) and a total of 29 stations in the regional coverage areas (2024: 27).

Alongside a number of completely new broadcasters, many of the well-known UKW private radio broadcasters previously established in Austria are broadcasting their programmes in parallel via DAB+ or have developed additional programmes separately for the DAB+ mode.

### 3.4.2.2 Awareness and use of DAB+ digital radio

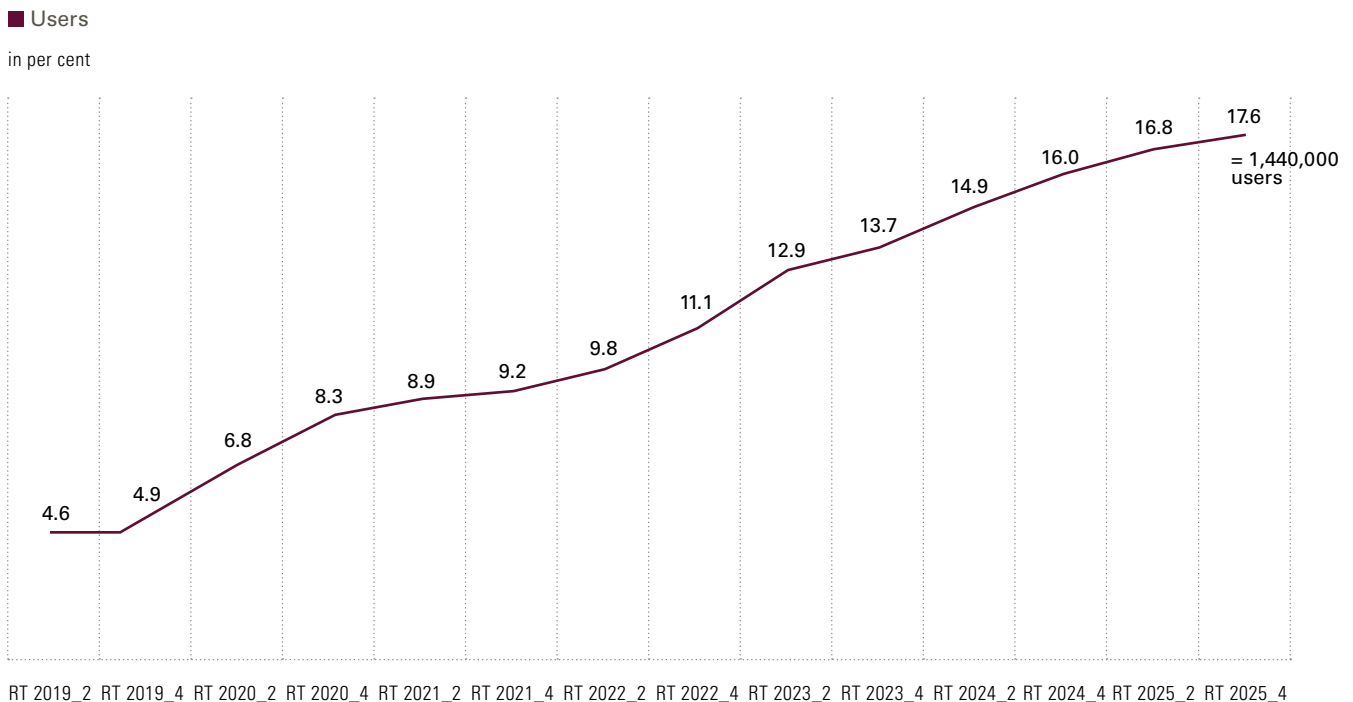
The DAB+ Digital Radio Awareness and Range Measurement report (DAB+ report), which was carried out in 2025 by market research institute Ipsos on behalf of RTR Media, presents how digital DAB+ terrestrial radio is used in Austria, the extent to which the population is familiar with it, and the number of households in Austria with DAB+-enabled devices. The representative survey was held between mid-January and the end of February 2025.

According to the 2025 DAB+ Report, about 50% of the Austrian population aged 15 and over are familiar with the term DAB+ digital radio, its logo, or even both. Some 27% of all Austrian households now own at least one device that is able to receive DAB+, while roughly a quarter of the population has listened to radio programmes via digital terrestrial DAB+ at least once.

According to the DAB+ Report for 2025, 18% of the overall Austrian population (which equates to 980,000 people) listened to digital terrestrial radio at least several times a month, several times a week or almost on a daily basis, six years after it was rolled out nationally.

The Radiotest (RT) survey, which is carried out on behalf of Austrian broadcasters by market research institutes GfK Austria and MindTake, shows a continuous increase in DAB+ usage since its nationwide launch in 2019. As of the end of 2025, it shows that 17.6% of users listened to DAB+ stations at least a couple of times a month. Again, this constitutes a significant rise compared with the previous year (2024: 16%).

**Figure 22: Radio reception via DAB+: at least once a month**

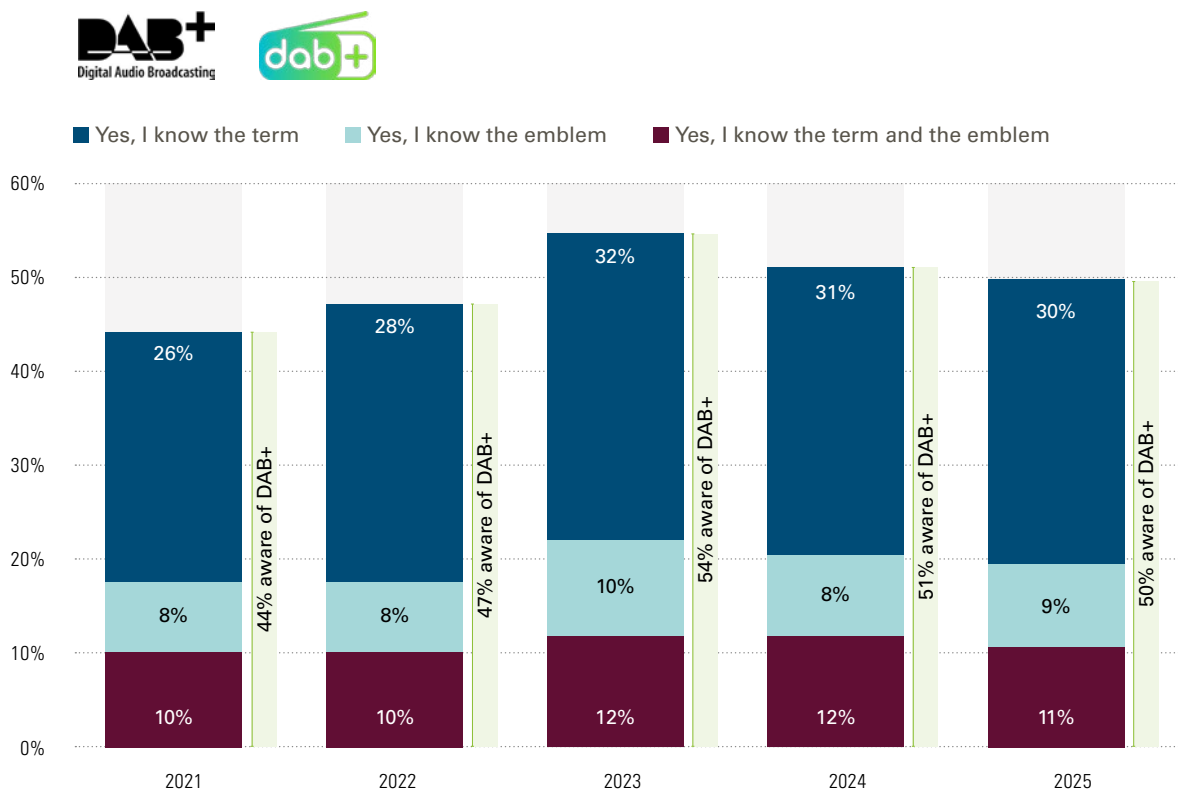


Radiotest 2025\_4; basis: all of Austria 10+, Mon to Sun, percentages

It should be noted that the basic groups surveyed in the Radiotest and DAB+ report differed as follows. Radiotest examines the usage behaviour of Austrians aged ten and over in several waves of surveys throughout the year, while the DAB+ report examines the 15 to 70-year-old age group. This group is surveyed once a year over a period of four weeks at the start of the year.

Whereas the use of digital radio stations has enjoyed constant growth, following high levels of awareness of DAB+ nationwide up to 2023 ( 50% of those surveyed had already heard of DAB+), a slight downward trend could be seen from the DAB+ Reports for 2024 and 2025. This could be an indication that those persons surveyed perceive the technical transmission mode to be less important, focussing on the programme portfolio instead.

Figure 23: Awareness of DAB+, trend for 2021-2025

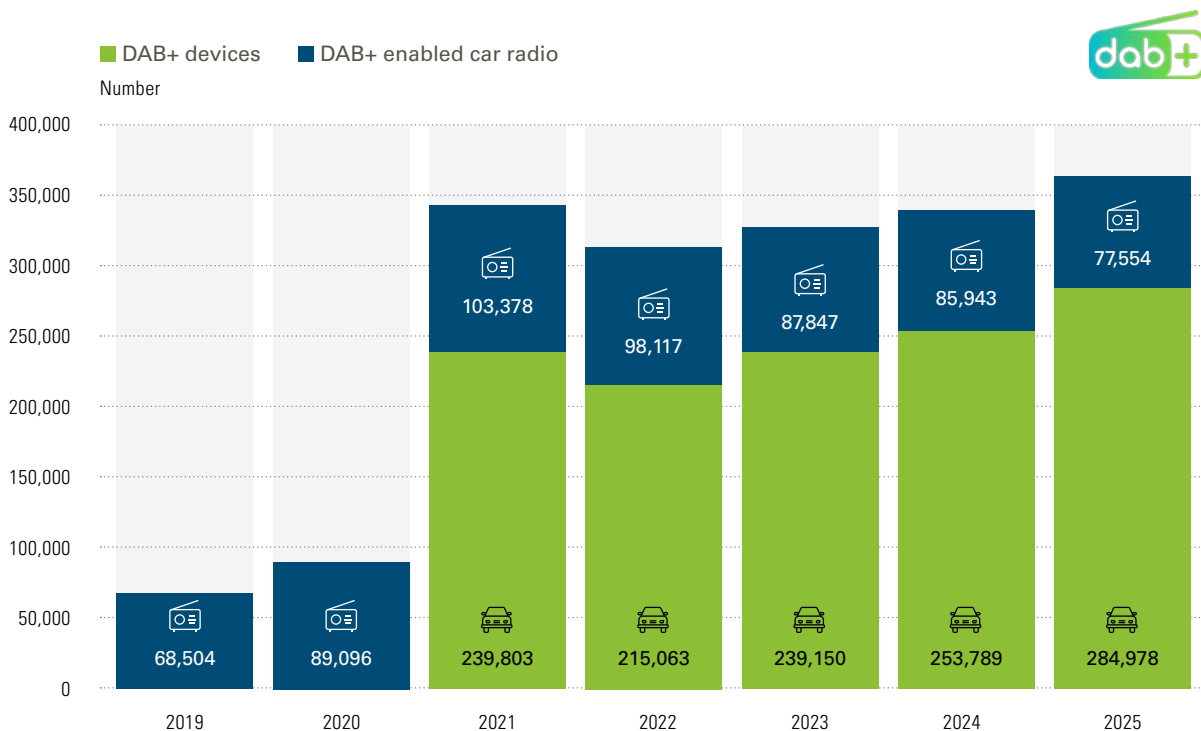


Bekanntheits- und Reichweitenmessung DAB+, Digitalradio Österreich 2025 (Awareness and Range Measurement of DAB+ and Digital Radio in Austria 2025), report by Ipsos on behalf of RTR Media

The change in perception of DAB+ may also be due to technical advances. The radio stations that are available within the reception area are clearly visible on the displays on modern car radios, irrespective of whether DAB+ or FM is used as the transmission technology. Users often no longer need to manually select the type of transmission.

Compared with the previous year, the perception of those persons surveyed of owning DAB+-enabled radio devices in their own household remained constant in 2025; this contradicts the continued high retail sales figures for receivers and an increased number of new passenger vehicle registrations (12%) compared with the previous year (<https://www.statistik.at/statistiken/tourismus-und-verkehr/fahrzeuge/kfz-neuzulassungen>). The increasing percentage of households with DAB+-enabled devices is mainly due to the EU Directive on the European Electronic Communications Code (EECC), which has required the installation of DAB+-enabled car radios in new vehicles since the beginning of 2021.

**Figure 24: DAB+ device sales per year, home devices and car radios**



Source: RTR/GfK Austria—Panelmarkt Radio/Statistics Austria—new vehicle registrations

According to the DAB+ Report, 27% of those surveyed claimed to own at least one DAB+ radio device at the start of 2025 (2024: 26%). The number of positive responses to this question was still three percentage points lower than in 2023 (30%). Car radios continue to account for the highest share with 16% of responses, improving slightly against the previous year (2024: 15%). However, they were still two percentage points below the 2023 value, when they received 18% of responses. Respondents who confirmed ownership of a portable DAB+ device remained unchanged for the third year in a row at 9%, while an unchanged 7% of respondents said they owned a DAB+-enabled hi-fi system.

The results of this survey on ownership of DAB+-enabled reception devices contrast with a five-year record of almost 254,000 new passenger vehicle registrations in 2024, and around 285,000 new registrations in 2025.<sup>30</sup> Added to this are around 164,000 DAB+ receivers for domestic use which were sold in the Austrian retail sector in 2025 (77,600) and 2024 (86,000)<sup>31</sup> (2023: 88,000 units; 2022: 98,000; 2021: 103,000; 2020: 89,000; numbers are rounded up and exclude international online retailers).

30 Statistics Austria

31 Panelmarkt/GfK Austria

In contrast, retail sales figures for FM-only receivers (at most supporting internet radio) are consistently falling and have fallen by almost one half since 2022. In 2025, a mere 153,000 FM-only radios were sold in Austria either as standalone devices or as part of hi-fi systems; in 2023, this figure was almost 206,000 whereas around 284,000 were sold in 2022, and around 318,000 FM-only radios were sold in 2021.

The DAB+ report is available (in German) for downloading from the RTR website at [https://www.rtr.at/DAB-Studie\\_2025](https://www.rtr.at/DAB-Studie_2025).

### 3.4.2.3 Crisis and disaster protection warnings via DAB+ (EWF, ASA)

In addition to 11 radio stations and one electronic programme guide, the emergency warning functionality (EWF) system that was developed for digital transmission routes is ready for service on the DAB+ MUX II in Vienna. The system, developed for digital transmission modes, immediately switches all of the multiplex programmes to an information channel in the event of a crisis or disaster. The information consists of an audible radio announcement and printed text information that is broadcast to DAB+ receivers with a display. At the same time, EWF-compatible radio receivers also power on automatically if they are in standby mode.

In 2021, RTR Media Division provided from its Digitisation Fund a grant for a project by RTG Radio Technikum GmbH to develop hardware and software enabling the EWF signals that are broadcast over DAB+ to also appear on electronic E-Ink information screens, such as those frequently available on public transport at bus and tram stops in Vienna for displaying timetables.

In 2024, in an event held by its Media Division and the Telecommunications and Postal Services Division, RTR initiated the nationwide introduction of digital warning messages using the more recent Automatic Safety Alert system (ASA) to be broadcast over DAB+ and as a potential convergent, hybrid development together with the AT alert system, which is based on mobile phone technology. ASA has the advantage over EWF in that it can address smaller-cell areas, thereby limiting the transmission of warnings much more closely to the areas that are actually affected. Talks regarding an initial test implementation are already under way in Vienna. With its 2025 Digitisation Plan, KommAustria is paving the way for the introduction of the Automatic Safety Alert (see [section 3.4.3](#)).

### 3.4.2.4 Digital radio via DVB-T2

Besides the digital radio transmission standard (DAB+), digital terrestrial radio stations can still be received via the DVB-T2 multiplex A, used for terrestrial television. Such stations are thus also included in the digital terrestrial programme portfolios marketed in Austria under the name of 'simpli'.

The three ORF nationwide radio stations have been broadcast without encryption via MUX A for several years. The ORF has also been broadcasting its nine regional radio stations in the respective provinces via MUX A since January 2024.

DVB-T2 transmission of the private radio station Radio Maria, which was broadcast nationwide via MUX F for many years, was discontinued in late 2025.

### 3.4.3 Expansion of digital broadcasting (Digitisation Plan)

By expanding the digital radio portfolio based on the DAB+ transmission standard, KommAustria took significant steps in 2024 towards implementing its ordinance regarding a digitisation plan for the introduction, deployment and advancement of digital broadcasting and other media services, most recently amended in 2021. With its 2025 Digitisation Plan, KommAustria issued an amendment to the ordinance in late 2025. This enabled the introduction of emergency warnings via DAB+ digital radio using the Automatic Safety Alert (ASA) system, the regionalisation of nationwide programme portfolios, and a change in technological standards.

The media authority updated its Digitisation Plan in advance of awarding the licences for the operation of Austria's two oldest nationwide broadcasting networks for digital terrestrial television, known as multiplexes A and B. These licences are due to expire in 2026 after a ten-year term and will then be put out to tender.

Among other things, the 2025 Digitisation Plan provides broadcasting network operators and multiplex operators with greater flexibility for digital terrestrial television, enabling them to use other transmission and video coding standards than those used to date. Even under existing licences, the previously used DVB-T2 and MPEG-4 systems could, for example, potentially be migrated to 5G broadcast and High Efficiency Video Coding (HEVC) to roll out ultra-high definition television (UHD-TV). However, in such a case, a consumers would need to be accommodated.

The Digitisation Plan also allows for the DVB-T2 stations that are broadcast nationwide to be tailored to regions. This could result in information content or even advertisements with regional significance being broadcast specifically in those areas where they are especially relevant.

The inclusion of the Automatic Safety Alert (ASA) emergency warning system for DAB+ receivers in the Digitisation Plan is of particular importance for consumers. ASA can independently switch on DAB+ radios that are turned off and transmit warning messages, addressing only those devices that are located within the actual danger area. Once the world's largest chip manufacturer for DAB+ receivers has integrated the ASA standard in its production, ASA-enabled DAB+ receivers will quickly become widely adopted. They can easily be identified by an ASA logo on the packaging.

The 2025 Digitisation Plan from KommAustria is published on the RTR website at <https://www.rtr.at/Digitalisierungskonzept2025>.

## 3.5 2025 report on self-regulation of commercial communication

### 3.5.1 General information: legal framework for self-regulation

The Fund for the Promotion of Self-Regulation in Commercial Communication was established at KommAustria in 2009. EUR 75,000 has been allocated to the fund each since 2021.

As defined in Art. 33 Par. 2 KommAustria Act (KOG), KommAustria is to grant, upon application, an annual allowance to a recognised self-regulatory body for commercial communication in media. The allowance is to be used to cover the costs incurred by safeguarding the independence of that body as well ensuring its ability to perform its duties in accordance with its articles of association. It should also help the body in effectively implementing its decisions and resolutions.

KommAustria has drawn up and published guidelines for awarding grants from the Fund for the Promotion of Self-Regulation in Commercial Communication.

Art. 32a KOG provides for the following prerequisites for recognising a self-regulatory body:

#### ***“Self-regulatory bodies***

*Art. 32a. (1) The activities of recognised self-regulatory bodies may be granted funding in order to help achieve the goal of ensuring compliance with minimum European standards on the part of content providers.*

*(2) A recognised self-regulatory body is defined as a body with legal personality that:*

- 1. guarantees a broad representation of the providers concerned, and comprehensive transparency in respect of decision-making criteria, procedures and the enforcement of decisions;*
- 2. defines conduct guidelines and rules of procedure that are generally recognised by the primary stakeholders and which clearly define the goals of self-regulation;*
- 3. ensures the periodic and transparent monitoring and assessment of the fulfilment of these goals, exclusively by an external and independent entity;*
- 4. ensures that complaints are effectively handled and that its decisions are enforced, including the imposition of effective and proportionate sanctions in the event of breaches of the conduct guidelines;*
- 5. prepares a report concerning its activities, its established goals, and the measures and decisions taken in accordance with No. 3 and 4, and publishes this report in a suitable format.*

*(3) Sanctions within the meaning of Par. 2 No. 4 include in particular:*

- 1. the publication of a decision by the self-regulatory body;*
- 2. the publication of a recommendation for future conduct by the self-regulatory body;*
- 3. the revocation of a quality seal or positive designation granted in accordance with the body's guidelines;*
- 4. potential identification of a breach or warnings in accordance with the body's legal framework.*

*[...]”*

The effectiveness of this self-regulatory system is then subjected to a subsequent audit by KommAustria. To facilitate such a follow-up audit, the legislation specifies the reporting requirements listed below.

Pursuant to Art. 32a Par. 2 No. 5 KOG, a self-regulatory body is to prepare an annual report on its activities, its established goals, and the measures and decisions taken in accordance with No. 3 and 4, and publish this report in a suitable format (activity report).

As defined in Art. 33 Par. 3c KOG, by 31 March of each following year, a recognised self-regulatory body for commercial communication is to submit to KommAustria a report addressing the effectiveness of the provisions of the conduct guidelines, as well as the type, number and outcome of complaints. The regulatory authority must publish an activity report presenting its assessment of and recommendations on effectiveness (effectiveness report).

Every four years, the self-regulatory body is to provide the regulatory authority with a report on the body's structure and working practice that illustrates its contribution towards the goal of achieving compliance with minimum standards on the part of content providers.

In spring of 2026, the Austrian Society for the Self-Regulation of the Advertising Industry, in its role as legal entity for the Austrian Advertising Council (ÖWR), released the reports for the year 2025, including the report on the ÖWR's structure and working methods.

### 3.5.2 Austrian Advertising Council

According to Art. 32a KOG, a recognised self-regulatory body is defined as a body with legal personality which ensures a broad representation of the providers concerned and fulfils the criteria of Art. 32a KOG.

Under the Society for the Self-Regulation of the Advertising Industry as its managing entity, the Austrian Advertising Council (ÖWR) represents such a recognised institution of self-regulation of commercial communication and has been receiving subsidies from KommAustria's fund earmarked for these goals since 2009.

According to the articles of association, the society's objective is to manage the self-regulation of the advertising industry in Austria, in order to ensure that the industry exceeds the statutory requirements for adherence to ethical and moral principles, in particular with the goals of protecting consumers from abuse in advertising and of promoting business ethics in general, while at the same time maintaining a commitment to competition and to the free expression of ideas.

The ordinary members of the legal entity "Society for the Self-Regulation of the Advertising Industry" of the ÖWR are (as of 2025): Dialog Marketing Verband Österreich (Dialogue Marketing Association Austria, DMVÖ), Verband Österreichischer Zeitungen (Austrian Newspaper Association, VÖZ), Verband der Regionalmedien (Association of Regional Media, VRM), Österreichischer Rundfunk (Austrian Broadcasting Corporation, ORF), Verband Österreichischer Privatsender (Austrian Association of Private Broadcasters, VÖP), Österreichischer Verband der Markenartikelindustrie (Austrian Association of the Branded Goods Industry, MAV), International Advertising Association, Austrian Chapter (IAA), Verein Interessensgemeinschaft der Media-Agenturen (Association for the Interest Group of Media Agencies, IGMA), Österreichischer Zeitschriften- und Fachmedienverband (Austrian Magazine Association, ÖZV), Internet Advertising Bureau Austria (IAB), Fachverband der Film- und Musikwirtschaft (Professional Association of the Film and Music Industry), Fachverband der Telekommunikations- und Rundfunkunternehmen (Professional Association of Telecommunications and Broadcasting Companies), Fachverband der Nahrungs- und Genussmittelindustrie (Lebensmittelindustrie) (Professional Association of the Food and Beverage industry—Food sector), Fachverband Werbung und Marktkommunikation (Austrian Advertising Association), Weischer.Cinema Austria GmbH, Österreichische Industriellenvereinigung (Federation of Austrian Industries, IV) and the Marketing Club Österreich (Marketing Club Austria).

The ÖWR gained a new ordinary member in 2025 with the Marketing Club Österreich.

The management board of the legal entity comprises President Michael Straberger, Vice President Roswitha Hasslinger and Vice President Gerald Grünberger as well as 18 additional board members.

Additional bodies of the society are the general assembly, which serves as an assembly of members within the meaning of the Associations Act (Vereinsgesetz), the Austrian Advertising Council (ÖWR) as an independently acting body to carry out self-regulation of the Austrian advertising industry, the Ethics Senate as an independently appointed council for evaluating the decisions of the ÖWR, the auditors, and the society's internal arbitration tribunal for settlement of all disputes arising within the society.

The ÖWR itself consists of 242 experienced and representative individuals from the three core segments of the advertising industry (media, agencies, clients), as well as from other disciplines and specialist fields (such as lawyers, doctors and psychologists) who are elected for a term of three years each.

Managing Director Andrea Stoidl is responsible for overall management of the administrative office.

### 3.5.3 Conduct guidelines (Code of Ethics)

The ÖWR's conduct guidelines in the form of the Code of Ethics (as most recently amended in April 2025), including annexes, have been generally accepted as a basis for decision-making and procedures by the main stakeholders, in particular the members of the responsible association who represent media, agencies, clients and higher-level institutions. The members of the council decide on submitted complaints based on the Code of Ethics.

The Code of Ethics of the ÖWR includes Basic Rules of Conduct as well as Special Rules of Conduct for various areas.

Within the Code of Ethics, the Basic Rules of Conduct set out general advertising principles as listed below.

*"Advertising thus bears social responsibility and must take into account the rights, interests and feelings of individuals and groups of people.*

- 1.1.1. *Advertising should be marked by the principle of social responsibility, especially towards children and young people before the age of 18.*
- 1.1.2. *Advertising must be legally permissible and strictly observe legal standards.*
- 1.1.3. *Advertising must comply with the principles of fairness as generally recognised in economic activity.*
- 1.1.4. *Advertising must not be contrary to generally accepted public morals.*
- 1.1.5. *Advertising must not violate human dignity, especially through degrading or discriminatory depictions.*
- 1.1.6. *Advertising must not violate the principle of honesty and truthfulness.*
- 1.1.7. *Advertising must not mislead through depictions containing allusions or imitations.*
- 1.1.8. *Advertising must not violate the right to privacy.*
- 1.1.9. *Advertising must be clearly recognisable as such.*
- 1.1.10. *Advertising should not directly or indirectly place consumers under pressure to make purchases.*
- 1.1.11. *Advertising should not be placed on advertising media that obviously contradict Austrian legal provisions."*

Additional basic rules of conduct exist for the areas of ethics and morality, violence, health, safety, the environment, illegal advertising practices and influencer marketing.

Special rules of conduct relate to gender-discriminatory advertising (sexist advertising), children and young people, older people, people with disabilities, alcohol, tobacco and motor vehicles.

The Code of Ethics is revised and extended on a regular basis. It was extensively revised and expanded in 2021, particularly with regard to health, alcoholic beverages, food and advertising in the environment of children and young people. Information relating to the environment was updated in 2023 and a voluntary self-regulation framework was defined for tobacco-free nicotine pouches.

The category people with disabilities was specifically added in 2025 with the aim of including non-discriminatory options for representing people with disabilities in the Code of Ethics. This will provide advertisers with guidelines for their advertising measures.

To support the ÖWR, an Anti-Sexism Advisory Board (established in 2012) and a Food Review Board (2021) were set up and integrated into the complaint process.

### 3.5.4 Rules of procedure

The rules of procedure (as of February 2025) define the responsibilities of the Advertising Council, the right to appeal and the course of the procedure as well as the possible sanctions in the event of failure to comply with the rules of conduct.

The rules of procedure were revised with participation of the sector and are generally accepted as a basis for decision-making and procedures by the main stakeholders, in particular the members of the responsible association working in media, as well as by agencies, clients and higher-level institutions.

In accordance with Article 13 of the rules of procedure, the ÖWR issues decisions that essentially fall into three categories:

1. No grounds for intervention
2. Raising awareness—request to proceed more sensitively in future when designing advertising measures or individual subjects
3. Request to immediately stop the campaign or immediately change the subject

Furthermore, Article 15 of the rules of procedure includes a graduated catalogue of sanctions with escalating levels in the event of failure to comply with the request to amend or discontinue the advertising measure (such as revoking the Advertising Council Quality Seal, informing interest groups, issuing a public warning in the form of a press release).

Pursuant to Article 16 of the rules of procedure, the Ethics Senate decides on any written objections to a 'stop request'.

### 3.5.5 2025 Annual Report

The annual report of the ÖWR, which is published (in German) on its website, discusses the activities, objectives and the complaints scorecard in detail.

### 3.5.5.1 2025 complaints scorecard

With regard to complaints procedures, the 2025 Annual Report shows that in 2025, 438 complaints were lodged with the ÖWR, resulting in 292 decisions (2024: 368 complaints/248 decisions; 2023: 334/235; 2022: 502/264). This means that the number of complaints submitted in 2025 increased by 19.02% and that 17.7% more decisions were issued against the previous year.

In 16 cases, a request was made to stop the subject or campaign immediately in 2025 (2024: 16; 2023: 15; 2022: 9). The stop decisions that were issued cited infringements of the following items of the Code of Ethics: 'gender-discriminatory advertising,' 'ethics and morals,' 'health' and 'safety.'

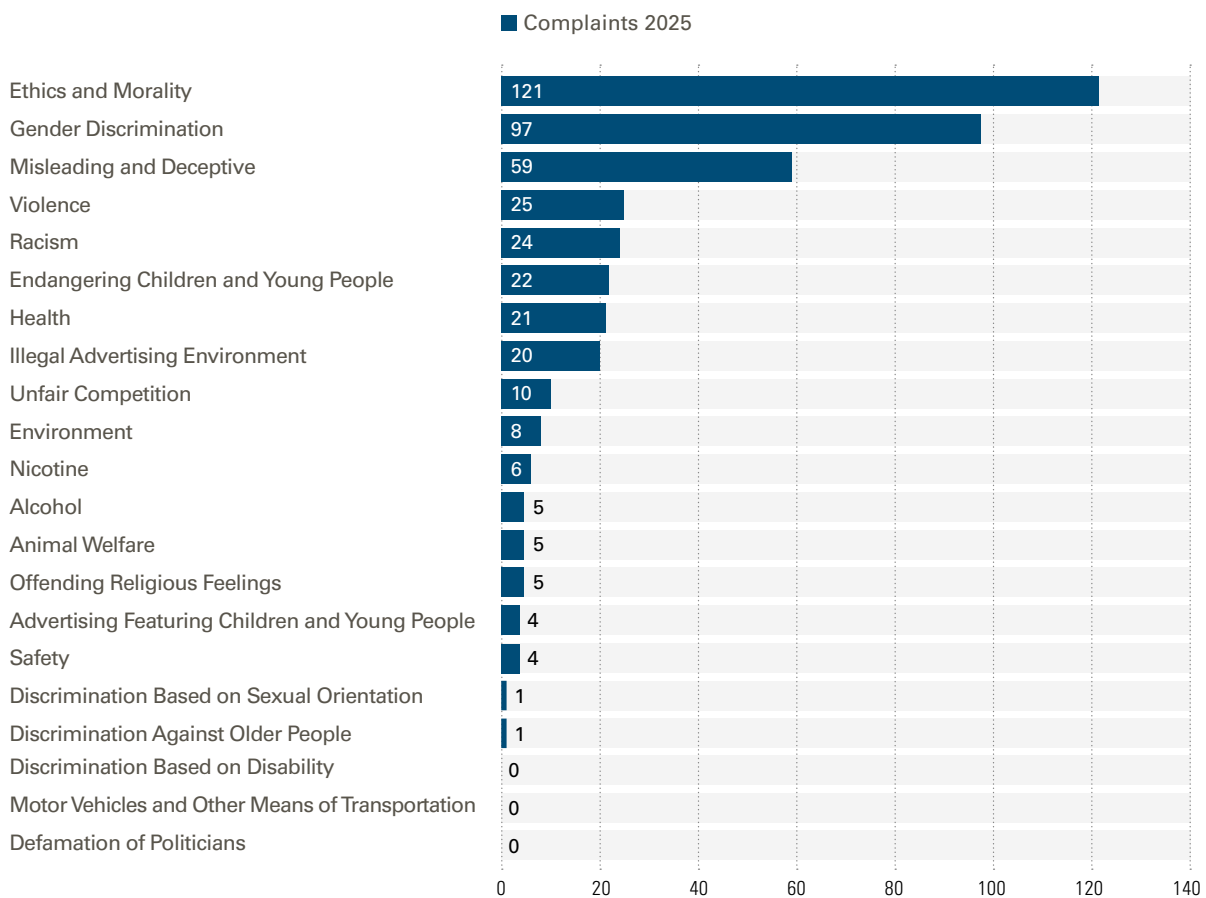
In 19 cases, the ÖWR handed down decisions involving "raising awareness—request to proceed more sensitively in future when designing advertising measures or individual subjects".

The companies receiving these decisions showed a willingness to cooperate with the ÖWR, as was reflected in the sharp increase in the number of subjects that were withdrawn immediately. In the end, 26 companies (2024: 18) withdrew or changed their advertising measures immediately after initially being contacted by the ÖWR business office.

In 41 cases, the members of the council saw 'no grounds for intervention.'

The following grounds for complaints were mentioned in 2025:

**Figure 25: Grounds for complaints in 2025 (n=438 complaints; as of 31.12.2025)**



Source: 2025 ÖWR Annual Report

This shows that the largest volumes of complaints received in 2025 fell into the categories of 'ethics and morals', which was responsible for 121 complaints (2024: 102), 'gender-discriminatory advertising' with 97 complaints (2024: 102) and 'misleading and deceptive advertising' at 59 complaints (2024: 44). The most common grounds for complaint therefore remained the same as the previous year. The figures for the categories of 'violence' (2025: 25; 2024: 9) and 'racism' (2025: 24; 2024: 10) are over twice as high compared to the previous year, thereby surpassing the number in the category 'endangerment of children and young people' (2025: 22; 2024: 21).

A comparison over several years shows that the largest number of decisions were always issued in the categories of 'ethics and morals', 'gender-discriminatory advertising' as well as 'misleading and deceptive advertising.'

With regard to advertising media, the majority of decisions issued in 2025 concerned advertising measures in the media categories of 'TV' and 'poster/citylight'. Complaints were also frequently made in the 'website' and 'social media' categories.

### 3.5.5.2 Additional activities

#### 3.5.5.2.1 2025 parents survey

The ÖWR parents survey into the cause of childhood obesity was held in 2025 for the second time since 2021. It shows that Austrian families have become even more aware of the importance of healthy nutrition. Parents still believe they play a crucial role in ensuring their children eat healthily and participate in physical exercise. Increased consumption of media or advertising were not specified as significant reasons for childhood obesity.

At the same time, the results of the survey reflect how patterns of shopping and nutritional behaviour have changed within society at large in recent years. Price has become a more significant factor, while interest in the information provided by advertising continues to remain high. Meanwhile, physical activity and education on healthy nutrition are still considered the most important measures for preventing obesity.

#### 3.5.5.2.2 Online decision-making tool

The complaint and decision-making tool was in 2024 to accelerate complaints processes and to make decision-making more efficient for all stakeholders. The online tool, available to both the ÖWR and consumers, was further refined in 2025.

#### 3.5.5.2.3 The influencer-awareness initiative

The 'Influencer' initiative, launched in 2024, was continued in 2025 with an expanded topical focus. Following an initial phase intending to create awareness, the focus of the initiative is now on quality assurance, transparency and certification. The objective is to promote responsible influencer communication by in the long term while establishing clear standards for ethically acceptable advertising practices in this rapidly growing sector.

The Austrian Advertising Council is currently working on a qualification programme for influencers and marketing managers on the client side. Key elements of the programme include: a previously introduced e-learning initiative ([www.ethicalad.at](http://www.ethicalad.at)), information relating to statutory labelling requirements, transparency obligations, and ethical behaviour are all .

At an international level, the umbrella organisation European Advertising Standards Alliance (EASA) is drafting a certification scheme for influencers. Together with a separate monitoring system, this will ensure stronger guidance for dealing with the market.

#### **3.5.5.2.4 Decision-making body—young council members**

A separate body for young members has been in place at the Austrian Advertising Council since 2013: the 'Young Advertising Council'. It evaluates advertising measures based on the Code of Ethics and publishes related decisions. At the end of 2025, 67 young female council members and 17 young male members were active.

#### **3.5.5.3 ÖWR's outlook for 2026**

Alongside defining structural and strategic parameters governing the future of self-regulation in the Austrian advertising industry, focus will be placed on further developing existing initiatives in 2026.

Ongoing improvements in the online decision-making tool and, in particular, further refining AI-based elements will be a key element in these activities.

The awareness initiative for influencers focuses on the issue of certification with the aim of increasing transparency, accountability and quality standards within influencer marketing.

A multi-level, participatory process is envisaged for the revision of the Code of Ethics. This would start with a survey among members of the council regarding the applicability and relevance of the Code. Together with relevant stakeholders and the management board, the results will then be revised, and finally published in the Code of Ethics.

Voting for the executive committee and the management board, taking place in early 2026, will determine how the association will be run for the next three years. The members of the council will be elected in autumn 2026.

In 2026, the ÖWR will begin preparations for hosting the international meeting of the umbrella association EASA in 2027.

### 3.5.6 Evaluation, assessment and recommendations by KommAustria to improve effectiveness

In the "Expert opinion assessing the fulfilment of objectives of the ÖWR—Austrian Advertising Council in accordance with Art. 32a KOG" of 24 February 2026, external expert Prof. Dieter Scharitzer states that the ÖWR fulfils the requirements set out in Art. 32a KOG for a recognised self-regulatory body. KommAustria shares this assessment.

The objectives of self-regulation (in particular protecting consumers from abuse in advertising, preserving ethical and moral principles, promoting ethics in business in general) are reflected both in the articles of association (see Art. 2 Objectives of the Association) and in the Code of Ethics. Based on the membership of the professional associations and federations, the providers concerned are clearly represented for the most part. All relevant interest groups in the field of commercial communication in media are represented. Both the self-regulatory body and the Code of Ethics and rules of procedure of the ÖWR are generally recognised.

All information can be found on the ÖWR website in an easily accessible and easy-to-understand form. Full transparency in respect of decision-making criteria, procedures and the enforcement of decisions is guaranteed (<https://www.werberat.at/beschwerdeablauf>).

The rules of procedure available on the website provide a regulated framework for the effective handling of complaints (Articles 1 to 13 of the rules of procedure) and the enforcement of decisions based on these, including the above-mentioned sanctions as gradually imposed based on a catalogue (Articles 14 to 17 of the rules of procedure). The Code of Ethics and the rules of procedure thus ensure that the ÖWR is able to effectively handle complaints and enforce its decisions, including by imposing effective and proportionate sanctions in the event of breaches of the conduct guidelines as defined in Art. 32a Par. 2 No. 4 and Par. 3 KOG.

The complaints scorecard in the 2025 annual report also attests to the effective handling of complaints. The annual comparison reveals that significantly more complaints were received in 2025 than in the previous year and that more decisions were accordingly also issued. The 438 complaints received (2024: 368) led to 292 decisions (2024: 248). This highlights not only the increased effort made by the administrative office but also rising awareness and increasing trust placed in the ÖWR as a reputable contact point over the past few years.

The Code of Ethics and the rules of procedure have generally proven themselves as practical tools, having been consistently improved as needed. Following a participatory discussion process to establish public opinion, the Code of Ethics was enhanced with the category of 'people with disabilities' in 2025. This aims to include non-discriminatory ways of representing people with disabilities in the specific code of conduct. For 2026, there are plans for another review the Code of Ethics.

At this juncture, special mention is to be made of how ÖWR online decision-making tool has been deployed and consistently improved since September 2024. This tool has made the process of submitting a complaint more user-friendly and efficient.

With regard to the effectiveness of the conduct guidelines, further attention needs to be focused on preventive measures such as positive certification with the 'Pro-Ethics seal' and the 'Pre-Copy Advice' service (advance check of unreleased advertising based on the Code of Ethics) as well as awareness-raising measures at the level of consumers and throughout the advertising industry in general.

Other areas of activity in 2025 include the ÖWR parents survey on the causes of childhood obesity and the relevance of promotional communication. The influencer-awareness initiative, launched in 2024, was also refined by drafting a comprehensive qualification programme for influencers and for marketing managers on the client side.

In summary, KommAustria is of the opinion that—based on the reports and documents submitted—the present system of self-monitoring by the ÖWR is generally an effective system within the meaning of the legal requirements. The fulfilment of the legal prerequisites of Art. 32a Par. 2 and Par. 3 KOG, the number of complaints brought before the ÖWR and the decisions taken, as well as the high level of awareness attributed to it warrant the conclusion that the ÖWR fulfils its duties effectively.

The report that is submitted by the ÖWR every four years in accordance with Art. 32a Par. 4 KOG confirms the finding that the Austrian Advertising Council's structure and working practices have become well established over the years and have been consistently refined on an ongoing basis. It has therefore contributed overall to the goal of ensuring content providers' compliance with minimum standards.



# Activities of RTR: Media Division

# 04 Activities of RTR: Media Division

## 4.1 Complaints board annual report

### 4.1.1 Summary for 2025—the procedures

By way of an overview of 2025, a total of 1,004 complaints were submitted in the reporting year, with the complaints board not competent to adjudicate on 82 of them. Online platforms, as defined by the Digital Services Act (DSA), accounted for the remaining 922 valid requests.

**Table 43: 2025 statistics on procedures**

Issue	Number of complaints submitted to the board (1,004 in total, not competent in 82 cases)
Online platforms (DSA, KDD-G)	922
Video-sharing platforms (AMD-G)	0
Major online platforms (UrhG)	0
Accessibility problems (AMD-G)	0
<b>TOTAL</b>	<b>922</b>

### 4.1.2 Process flow for a conciliation procedure

RTR provides user guidance for submitting requests to the complaints board on the RTR website at [https://www.rtr.at/medien/was\\_wir\\_tun/Beschwerdestelle/Beschwerdeportal.en.html](https://www.rtr.at/medien/was_wir_tun/Beschwerdestelle/Beschwerdeportal.en.html). Competence of the complaints board is limited to the following types of complaints:

- A media service provider does not adhere to mandatory accessibility requirements.
- A video-sharing platform does not offer a system for reporting complaints and/or does not allow users to submit assessments.
- A major online platform does not comply with the Federal Act on Copyright in Literary and Artistic Works and Related Rights (UrhG).
- The internal complaint-handling system provided by an online platform within the meaning of the DSA was not able to assist users with their concerns to an acceptable standard.

When completing the online form, applicants are requested to provide the information and documents that are necessary for a complaint. These must be submitted to the complaints board, in writing and in German.

Following the submission of the complaint, as a first step, the complaints board verifies whether the specified issue does indeed fall within its scope of responsibility. If the competence of the complaints board is established, in a subsequent step, the complaint is examined to determine whether it is complete and correct. In the course of such an investigation, should it become evident that the complaint has been formulated in an unclear or inconclusive manner, or if the documents or declarations that are required for processing the complaint are not provided in full, the complaints board can request the applicant to amend and revise the complaint within a specified period.

After receiving complete information from the applicant, the complaints board starts working on its core task of mediating between the parties towards achieving an amicable settlement.

Applicants should note that, in general, both participation in the complaints procedure and acceptance of the conciliation proposal are voluntary. Service providers of online platforms are obliged to agree to the procedures only in the case of complaints relating to the internal complaint-handling systems provided by online platforms, as defined in Art. 21 DSA. Such service providers are not, however, obliged to adopt and implement the decisions proposed by the complaints board.

### 4.1.3 Rules of procedure

The rules of procedure govern how the complaints board operates. RTR publishes the rules on its website, to give both parties detailed insight into working practices at the complaints board. Applicants in particular can read through the rules of procedure to determine whether their issue falls within the complaints board's scope of responsibility. The rules also explain how the board processes a complaint.

The procedural rules are aligned with the basic principles of the Alternative Dispute Resolution Act, specifically with Art. 6 Par. 2 and Par. 6 No. 1, Art. 7 Par. 1, Art. 8 Par. 1 No. 1 and 2, and Par. 2. The rules can be accessed via the following link to the RTR website (in German): [https://www.rtr.at/medien/aktuelles/veroeffentlichungen/Veroeffentlichungen/Sonstiges/verfahrensrichtlinien\\_beschwerdestelle/Verfahrensrichtlinien.de.html](https://www.rtr.at/medien/aktuelles/veroeffentlichungen/Veroeffentlichungen/Sonstiges/verfahrensrichtlinien_beschwerdestelle/Verfahrensrichtlinien.de.html)

### 4.1.4 DSA dispute resolution

In a decision dated 24 October 2024 (KOA 16.400/24025), KommAustria certified the RTR complaints board as an out-of-court dispute settlement body pursuant to Art. 21 DSA.

Since being certified, the complaints board spends the majority of its time handling complaints as defined in Art. 21 DSA. All 1,004 of the complaints that were submitted in 2025 resulted from disputes between users and online platforms within the meaning of Art. 3(i) DSA.

The RTR website provides a detailed breakdown of the activities undertaken by the out-of-court dispute settlement bodies pursuant to Art. 21 DSA, with the annual and half-yearly reports provided by these bodies published on this website at regular intervals.

In addition to the number of disputes received by the complaints board, these reports provide information about the outcomes of the disputes, the average time taken for dispute resolution, and any shortcomings or difficulties encountered when working together with the various online platforms.

#### 4.1.4.1 Number of procedures and outcomes

The 922 complaints pending involved a total of 32 distinct online platforms. Of these, twelve had been designated as Very Large Online Platforms (VLOPs) by the European Commission (<https://digital-strategy.ec.europa.eu/en/library/designation-decisions-first-set-very-large-online-platforms-vlops-and-very-large-online-search>).

**Table 44: Completed and pending procedures in 2025**

	<b>Total pending procedures</b>	<b>Total procedures completed</b>
Existing cooperation with online platform/ongoing procedures	228	233
No cooperation/ongoing onboarding process	365	85
No contact established with online platform/contact attempt unsuccessful	11	0
<b>TOTAL</b>	<b>604</b>	<b>318</b>

Eleven requests involved online platforms that could not be contacted or which had not responded to an attempt to contact them. This is attributable to the fact that such online platforms do not name a contact person to be responsible for handling procedures. In these cases, the dispute settlement body made several attempts via publicly accessible points of contact to inform the online platform about the complaints that have been received. However, no reply was received in any of the cases.

450 complaints concern online platforms that currently refuse to cooperate with RTR on specific cases, due to the extremely complex onboarding process for such online platforms. Negotiations and discussions with these online platforms are under way. A total of 85 procedures were nonetheless completed, either because the online platforms revised their moderation decision, or else the complainants withdrew their requests.

The remaining pending procedures relate to a total of 27 different online platforms. These are currently being processed and will be completed in due course.

#### 4.1.4.2 Procedure duration

Art. 21 Par. 4 DSA states that all out-of-court dispute settlement procedures must be completed within 90 days (normal cases) or 180 days (highly complex cases). One problem with this approach, however, is that establishing contact with the individual online platforms (i.e. the onboarding process) already involves an extended period of time.

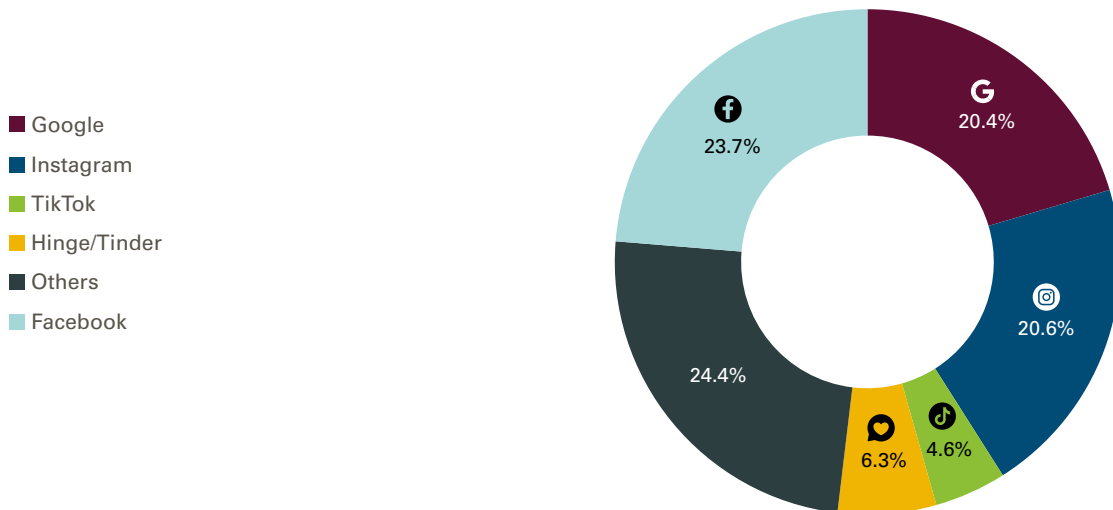
**Table 45: Average procedure duration (days)**

	<b>Average procedure duration (days)</b>
All procedures completed (including highly complex cases)	43

### 4.1.4.3 Cooperation with online platforms

Cooperation with online platforms accounting for the majority of the requests is described in summary form below.

**Figure 26: Distribution of requests submitted to online platforms in 2025**



A good working relationship was established with the majority of platforms concerned. Yet, of the requests received that fall within RTR’s area of responsibility, a considerable share (approximately 44%) pertains to the META Group. Although the matter is pressing, the tedious and extremely complex onboarding process has stood in the way of any cases actually being handled up to now. Talks were held with both the competent coordinators and the European Commission, to appropriately deal with the cases. The dispute settlement body is currently considering suitable measures.

A further 20% of the requests concern various Google services, while a good working relationship has been established here.

MTCH online platforms account for a share of slightly over 6%, while TikTok accounts for 4.6%. A good working environment exists with both providers.

The remaining 24% of requests concern various other online platforms.

#### **4.1.5 Complaints procedures relating to video-sharing platforms**

The provisions of Art. 54c ff of the AMD-G apply to video-sharing platforms run by providers domiciled in Austria as defined in Art. 3 No. 3 of the E-Commerce Act (ECG).

In 2025, no complaints were received concerning video-sharing platforms.

#### **4.1.6 Complaints procedures relating to accessibility issues**

During the reporting period, the complaints board received no complaints alleging a lack of accessibility of content provided by audiovisual media services.

#### **4.1.7 Complaints procedures relating to major online platforms**

No complaints were received in relation to major online platforms during the period under review.

#### **4.1.8 Events**

During the reporting period, an event entitled "Information instead of manipulation – how to achieve media literacy amidst the flood of information?" was organised, taking place on 13 November 2025.

The first part involved presentations to the audience on topic-related content. In the second part, a panel of experts turned their attention to the following question: From the perspective of science, media and youth protection, how can we as a society empower people to handle disinformation?

The experts participating in the event who had previously contributed to the 2025 Media Literacy Report were invited to present and comment on the articles they had published in the report. Other experts participated who had not been previously involved in the Media Literacy Report, and these individuals were able to offer added perspectives on the issue.

The invited experts were: Marian Adolf, professor at the Department of Communication, FHWien der WKW (Vienna University of Applied Sciences); Alen Velagić, PR, Process Management & Coaching at Postmodern Solutions; Markus Schwinghammer, lead analyst – Hybrid Threats at Disinfo Consulting; Ulrike Schiesser, managing director of the Federal Office for Cult Affairs; Eva Wackenreuther, officer for verification and fact checking at ORF; and Alice Krieger-Schrohm, Youth Media Protection Association.

## 4.2 Management of funds and grants

### 4.2.1 Digitisation Fund

Since the increase in funding in 2024, the Digitisation Fund is currently allocated EUR 1.5 million each year (previously EUR 500,000). The purpose of the fund is to promote digital transmission technologies and digital applications based on European broadcasting standards.

#### 4.2.1.1 DAB+ and other funding

In 2025, the Digitisation Fund continued to focus on subsidising the costs of transmission for broadcasters of DAB+ stations. Expansion of multiplex platforms continued in 2025, thereby creating space for additional nationwide and regional stations to be broadcast over DAB+.

The funding provided covers one-time planning, procurement and setup costs for technical infrastructure (technical broadcasting costs) and/or broadcasters' shares of the fees due for the technical costs of broadcasting DAB+ radio programmes. The latter portion refers to the fees that the multiplex operators charge to broadcasters of digital terrestrial radio for the technical part of broadcasting the respective radio programmes.

Previous funding of the rollout of regular DAB+ service, begun in 2018, was continued in the reporting period. Taking degressive funding into account, project funding was renewed in 2025 for 37 stations in total, with a volume of approximately EUR 1,099,864.

Changes were also made with respect to the submission deadlines. Applications must now be submitted by specific dates during the year. Applications may only be submitted as of 30 June and 31 December in any calendar year. Furthermore, the funding period is limited to a maximum of twelve months. The regulations regarding degressive funding have also changed. In contrast to the previous guidelines, the maximum funding period is now limited to five years.

New funding guidelines entered into force in the 2025 funding year. The mandatory submission of future applications via the eRTR-Portal is one of the key changes that were introduced. The terms of submission have also been amended; applications may only be submitted as of 30 June and 31 December in any calendar year.

The funding period was also limited to a maximum of twelve months. Furthermore, the provisions for degressive funding have also been redrafted. In contrast to previous guidelines, the maximum funding period is now limited to five years.

In line with the aim of providing initial funding, only the first two years are funded with the maximum funding rate of 50%. The maximum funding rate consistently falls thereafter, with no funding available after the fifth year.

The current guidelines can be viewed (in German) at [https://www.rtr.at/medien/was\\_wir\\_tun/foerderungen/digitalisierungsfonds/Richtlinien/startseite.de.html](https://www.rtr.at/medien/was_wir_tun/foerderungen/digitalisierungsfonds/Richtlinien/startseite.de.html).

#### **4.2.1.2 Grant for a nationwide media and public relations project to promote the many facets of digital radio among the Austrian population**

The Verein Digitalradio Österreich association applied for renewed funding for a project involving measures to raise public awareness about the digital transmission of radio broadcasts.

This project uses various marketing measures and information campaigns to inform the population about DAB+ as a media channel as well as its advantages.

The project is also aimed at providing information about the ASA warning system. The website of the Verein Digitalradio Österreich association will be updated accordingly, with explanatory videos and important information also available for download. Funding was approved to cover 50% of the costs.

#### **4.2.1.3 Project funding for pilot studies and research proposals relating to digital transmission of radio broadcasts**

Österreichische Rundfunksender GmbH & Co KG submitted a project that focuses on continuing 5G broadcast (for improved efficiency of terrestrial broadcasting).

The project also aims to further develop the 5G broadcast standard and increase its efficiency. The focus is on optimising signal transmission and integrating 5G broadcast with existing technologies. Funding was approved to cover 50% of the costs.

#### **4.2.1.4 Grant for a project to develop programmes and ancillary services**

Österreichische Rundfunksender GmbH & Co KG submitted a project focusing on the DAB+ Automatic Safety Alert (ASA) system for a tunnel scenario.

The pilot project aims to investigate the use of the DAB+ standard for sending geo-referenced warnings within the Automatic Safety Alert (ASA) system. Building on the findings from 5G broadcast trials, authorities are to be tied in via the existing interface (AT Alert). The objective is to optimise DAB+ as a supplementary system for sending warnings to the population at large. Funding was approved to cover 50% of the costs.

#### **4.2.1.5 Notes on the 2025 annual accounts**

Based on the statement for the trustee account as at 31 December 2024, and considering the credits and disbursements as well as the grants already approved but not yet disbursed, 1,286,992.99 was available in the fund as at 31 December 2025 (see the table below for details).

**Table 46: Digitisation Fund – excerpt from the 2025 annual accounts**

<b>Austrian Digitisation Fund</b>	<b>EUR</b>	<b>EUR</b>
Trustee account balance as at 31 December 2024		2,861,301.39
<b>Credits</b>		
Revenues received in 2025	1,500,000.00	
Interest/fees	25,836.98	
Grant repayments	1,419.53	1,527,256.51
<b>Debits</b>		
Administrative expenses	-198,000.00	
Deferred payment/repayment of administrative expenses from 2024	-24,765.76	
Grant disbursements in 2025	-2,133,304.21	-2,356,069.97
Balance resulting from initial amount, credits and debits in 2025		
<b>= Trustee account balance as at 31 December 2025</b>		<b>2,032,487.93</b>
Outstanding administrative expenses in 2025 and RTR participation in projects in 2025, for repayment in 2026		29,555.02
<b>Balance of trustee obligations as at 31 December 2025</b>		<b>2,062,042.95</b>
Approved grants pending disbursement		
Committed funds from 2024	-39,546.55	
Committed funds from 2025	-735,503.41	-775,049.96
<b>Funds available in 2026</b>		<b>1,286,992.99</b>

## 4.2.2 Austrian Television Fund

The Austrian Television Fund provides funding for Austrian television productions. Funding supports the production and commercial exploitation of television films, series and documentaries. It was set up at RTR in 2004 by the Austrian federal government to provide support to the Austrian film industry and promote Austria's attractiveness for the media industry. RTR manages the available budget which amounts to EUR 13.5 million each year. Grants are awarded from this fund based on guidelines, along with Articles 26 to 28 and Articles 23 to 25 of the KommAustria Act (KOG), which together constitute the legal basis for the activities of the Austrian Television Fund.

The Austrian Television Fund's statutory remit includes financial support for independent Austrian producers, thereby stimulating the productivity of the domestic production sector and creating long-term employment in the film industry. Another objective is to improve the quality of television productions, thereby preserving Austria's rich cultural landscape and making a vital contribution towards strengthening the audiovisual sector in Europe. Key criteria considered in the grant award process include value creation and spending in Austria.

### 4.2.2.1 Projects funded in 2025

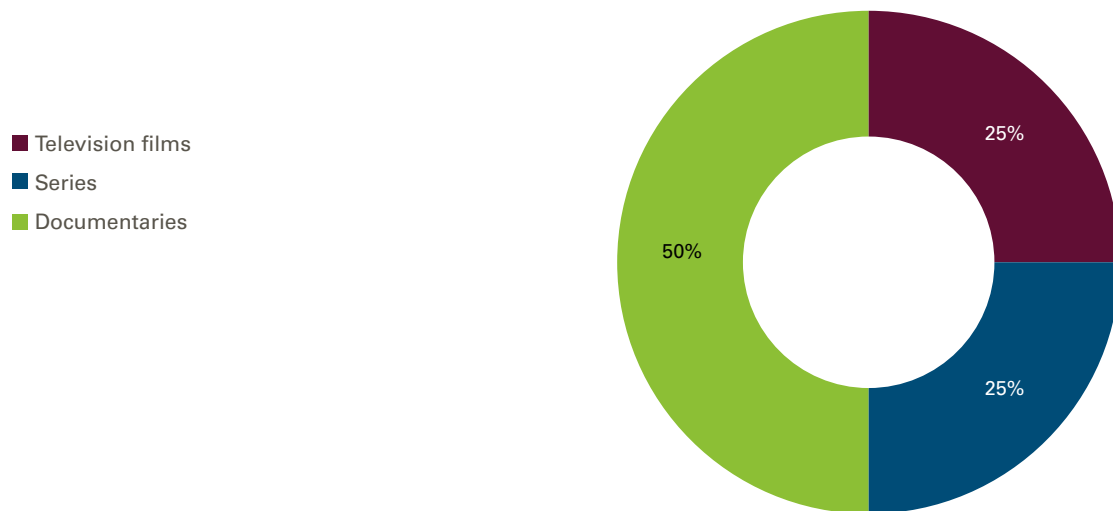
Of the 137 applications that were submitted in 2025, 115 productions were funded with a total of EUR 12,355,033.

Funding was approved to cover roughly EUR 129.8 million of planned total production costs. Spending in Austria in connection with these television productions is expected to amount to EUR 100.4 million. The latter figure represents 8.1 times the amount of total funding awarded by the Austrian Television Fund.

#### Details of submitted projects

The 115 grants approved provided support to 16 television films (excellence bonus), six series (excellence bonus) and 93 documentaries (production grants). The figure below gives details on how the funding shares were distributed.

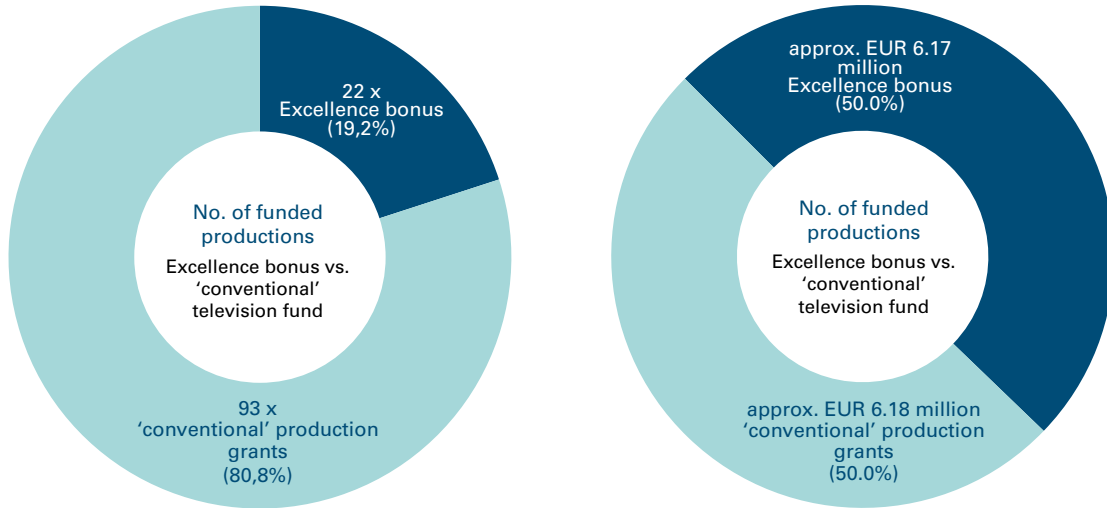
Figure 27: Austrian Television Fund—grants approved in 2025



The proportion of funding awarded to television films and TV series dropped from 27 to 25% compared year on year. The grant share for series increased to 25% from the previous 21%. The funding share awarded to documentaries increased to 50% from the previous year, when the figure was 47%.

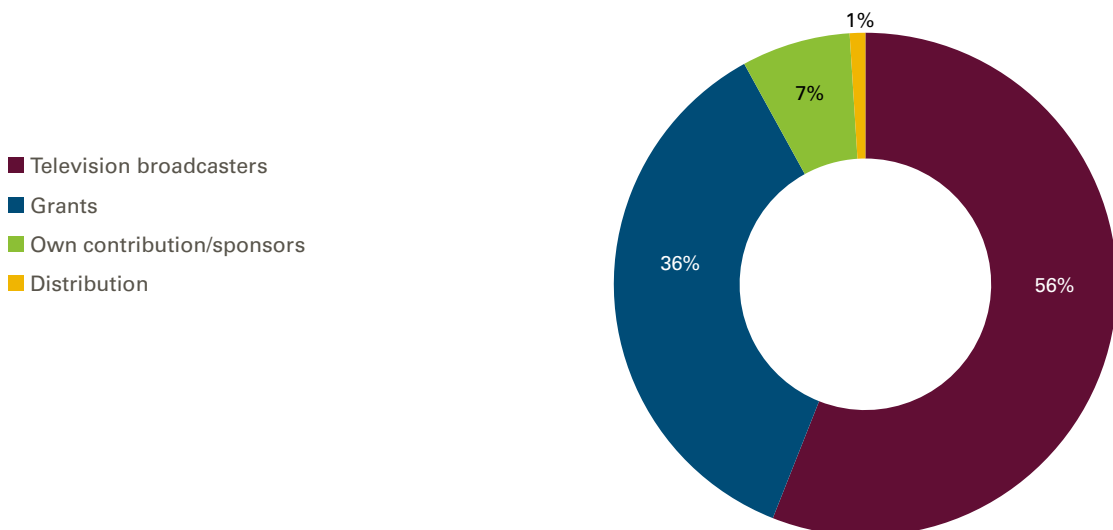
**Figure 28: Austrian Television Fund—excellence bonus/production grants**

- Productions with total budget under EUR 1.8 million
- Productions with total budget over EUR 1.8 million



Of the submissions made during 2025, 22 projects received funding from the excellence bonus, making for a share of 19.2%. In all, 93 projects were supported by previous production grants (80.3%). The funds were distributed almost equally. Around EUR 6.17 million (50.0%) was disbursed via excellence bonus grants, while 'conventional' production grants accounted for roughly EUR 6.18 million (50.0%).

**Figure 29: Austrian Television Fund—share of financing contributed to projects funded in 2025**

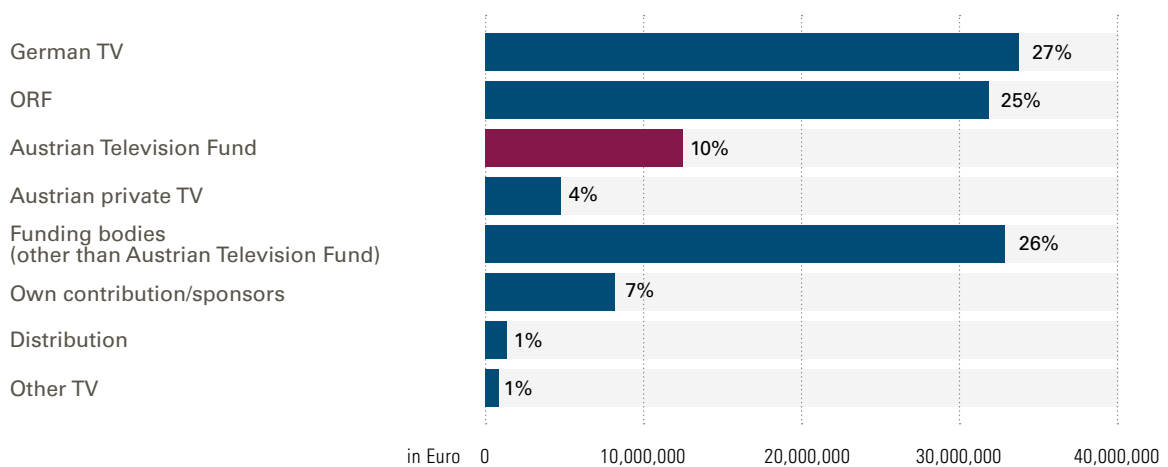


The productions supported in 2025 sourced 56% of their funding from television broadcasters, 36% from grants, 7% from own funds and sponsoring, and 1% via distribution agreements.

Compared with the previous year, the proportion of television broadcasters stayed constant at 56%, but their share of funding rose slightly to 36%.

Co-financing provided by funding bodies other than the Austrian Television Fund accounted for 26% of the total in 2025. Of a total of 115 funded television productions, Austrian funding bodies were exclusively involved in the financing of 68 productions, while 46 projects were also supported by European funding bodies, and an international TV broadcaster participated in one project.

**Figure 30: AUSTRIAN TELEVISION FUND–co-financing by other funding bodies**



### Participation by television broadcasters

From the total number of 115 funded projects, 95 television productions were co-financed by the ORF. The number of productions receiving funding from Austrian private television broadcasters dropped marginally from 16 to 15 compared with the year before, with the share of production costs covered falling from 9% to 4%.

German television broadcasters participated in a total of 32 projects. In their financing, 14 productions reported participation by European broadcasters outside of Germany, specifically from broadcasters in Belgium, Czechia, France, Italy, Portugal or Switzerland.

As in previous years, the majority of productions co-financed by European broadcasters were documentaries. Germany was the main European country whose broadcasters contributed to funding films or series.

In 2025, participation by a broadcaster based outside Europe was observed for one documentary, with a Canadian broadcaster involved in production.

### Women's share in the funded projects

In terms of appointments to senior management positions—production, direction and screenplay—patterns shifted compared with the previous year. The percentage of women among producers fell from 29% to 20%. The share of female directors also declined, from 46% to 41%. The share of female screenwriters remained unchanged at 41%.

**Table 47: Austrian Television Fund—gender statistics for funded projects**

2025	Women		Men	
	Number	Percentage	Number	Percentage
Executive producers/producers	23	20%	92	80%
Directors	69	41%	98	59%
Screenwriters	76	41%	111	59%

#### 4.2.2.2 Exploitation grants

To support the broader distribution of their film projects, producers received Austrian Television Fund grants to produce versions for the hearing and visually impaired, as well as versions in other languages and for submission to film festivals.

Grants totalling EUR 173,026.44 were approved in 23 cases in 2025.

Full details of the projects supported and the grant award guidelines are published on the website of the Austrian Television Fund ([www.fernsehfonds.at](http://www.fernsehfonds.at)).

### 4.2.2.3 Notes on the 2025 annual accounts

Based on the statement for the trustee account as at 31 December 2024, and considering the credits and disbursements as well as the grants already approved but not yet disbursed, 732,182.42 was available in the fund as at 31 December 2025; see the table below for details.

**Table 48: Austrian Television Fund—excerpt from the 2025 annual accounts**

<b>Austrian Television Fund</b>	<b>EUR</b>	<b>EUR</b>
Trustee account balance as at 31 December 2024		6,033,505.23
<b>Credits</b>		
Revenues received in 2025	13,500,000.00	
Interest/fees	85,735.18	
Administrative expenses carried over from 2024	91,666.99	13,677,402.17
<b>Debits</b>		
Administrative expenses in 2025	-870,400.00	
Grant disbursements	-12,398,671.91	-13,269,071.91
Balance resulting from initial amount, credits and debits in 2025		
<b>= Trustee account balance as at 31 December 2025</b>		<b>6,441,835.49</b>
Outstanding administrative expenses from 2025 for repayment in 2026		89,018.54
<b>Balance of trustee obligations as at 31 December 2025</b>		<b>6,530,854.03</b>
Approved grants pending disbursement Grants		
Committed funds from 2021	- 6,666.67	
Committed funds from 2022	- 23,167.71	
Committed funds from 2023	- 229,083.00	
Committed funds from 2024	- 1,375,788.49	
Committed funds from 2025	- 4,163,965.74	- 5,798,671.61
<b>Funds available in 2026</b>		<b>732,182.42</b>

## 4.2.3 Broadcasting funds

The Fund for the Promotion of Private Broadcasting (Private Broadcasting Fund) and the Fund for the Promotion of Non-Commercial Broadcasting (Non-Commercial Broadcasting Fund) were set up in 2009 with the amendment of the KommAustria Act (KOG). A total of EUR 6 million was originally allocated to the two funds when they were first introduced. In subsequent years, and due to increasing funding requirements and the steadily growing number of projects that were submitted, the funds were increased by law on a number of occasions.

The Non-Commercial Broadcasting Fund currently boasts an annual budget of EUR 6.25 million, and the Private Broadcasting Fund EUR 25 million.

The grants serve to promote the Austrian broadcasting system. Broadcasters can apply for grants if their programmes require a licence or notification as defined in the Audiovisual Media Services Act (AMD-G) or the Private Radio Act (PrR-G).

Funding is awarded on the basis of applicable legislation and approved guidelines.

### 4.2.3.1 Non-Commercial Broadcasting Fund

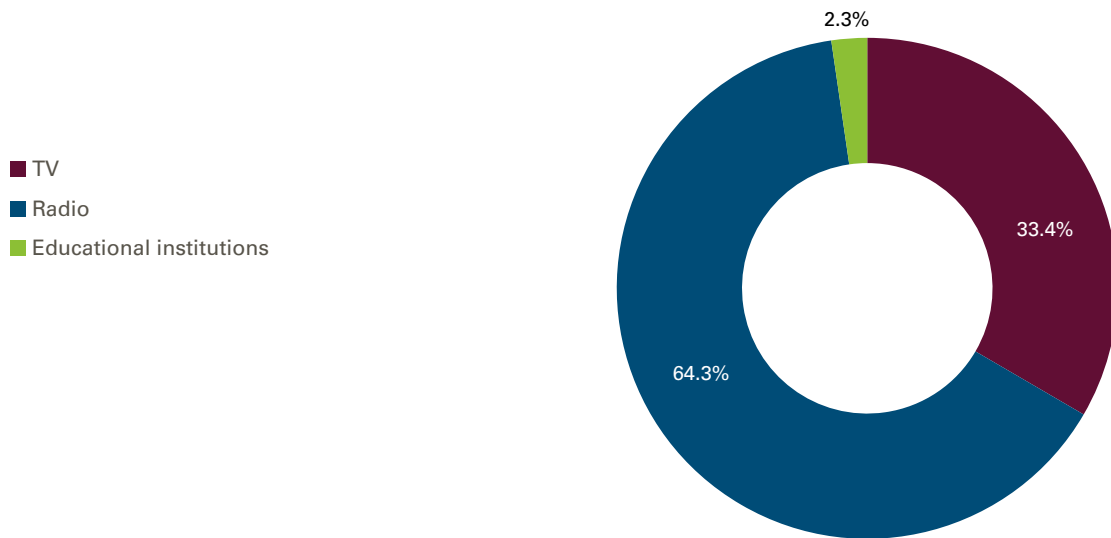
The Non-Commercial Broadcasting Fund is committed to helping broadcasters deliver a diverse portfolio of high-quality programming. It promotes open access, thereby enabling a large percentage of the population to participate in media, thus strengthening media literacy through active involvement while contributing significantly towards a diversity of opinions. At the same time, the fund contributes to revitalising Austria's creative scene, ensuring the sustained development of versatile, high-quality programmes for broadcast.

#### 4.2.3.1.1 Submission deadlines in 2025

During the first round and second rounds of submissions for 2025 (1–31 October 2024 and 15 April–15 May 2025 respectively), a total of 98 applications were submitted by radio broadcasters, 14 by television broadcasters and three by education and training initiatives.

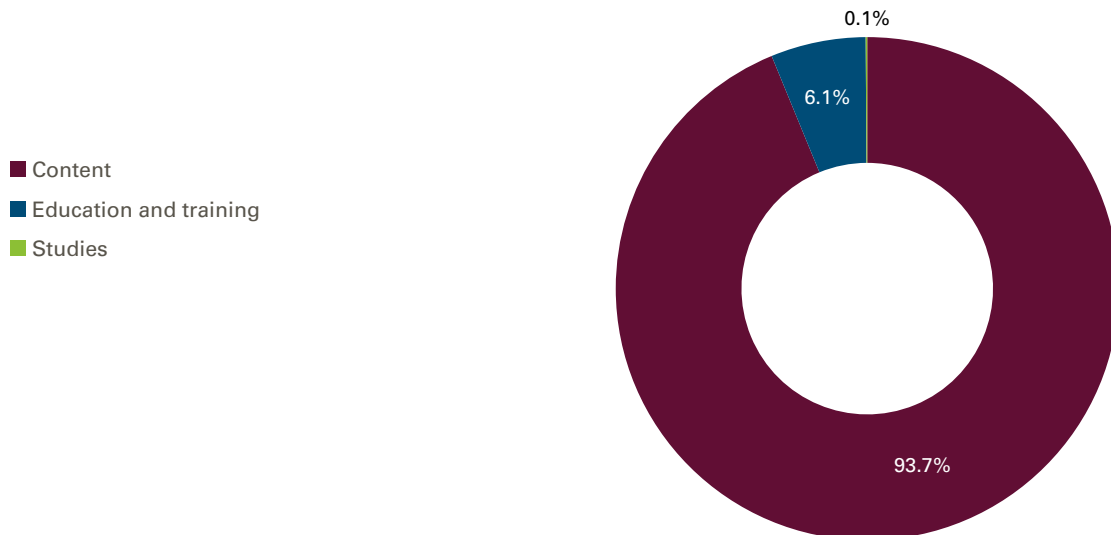
The fund awarded grants to 97 projects from non-commercial radio stations, 13 from community television stations and three from educational institutions in radio broadcasting.

Figure 31: Non-Commercial Broadcasting Fund—grants approved in 2025



Refunds and carry-forwards from the previous year meant that a total of EUR 7,115,568 was assigned in 2025. Of the funding, 33.4% (EUR 2,378,031) went to television, 64.3% (EUR 4,573,437) went to radio and 2.3% (EUR 164,100) was allocated to educational institutions.

Figure 32: Non-Commercial Broadcasting Fund—funding in 2025 by category



Of the total funding awarded, EUR 6,670,248 (93.74%) were awarded for content creation, EUR 435,763 (6.12%) for education and training and EUR 9,557 (0.13%) went to reach surveys and quality studies.

Full details of the projects supported and the grant award guidelines are published on the RTR website at [www.rtr.at/rundfunkfonds-nichtkommerziell](http://www.rtr.at/rundfunkfonds-nichtkommerziell).

#### 4.2.3.1.2 Notes on the 2025 annual accounts

Based on the statement for the trustee account as at 31 December 2024, and considering the credits and disbursements as well as the grants already approved but not yet disbursed, EUR 233,300.79 was available in the fund as at 31 December 2025; see the table below for details.

**Table 49: Non-Commercial Broadcasting Fund—excerpt from the 2025 annual accounts**

Non-Commercial Broadcasting Fund	EUR	EUR
Trustee account balance as at 31 December 2024		2,007,357.72
<b>Credits</b>		
Allocation of revenues received in 2025	6,250,000.00	
Administrative expenses carried over from 2024	34,418.28	
Grant repayments	6,789.96	
Interest on grant repayments	7.75	6,291,215.99
<b>Debits</b>		
Interest/fees	-1,043.55	
Administrative expenses in 2025	-196,000.00	
Grant disbursements in 2025	-6,663,651.52	-6,860,695.07
Balance resulting after initial amount, credits and debits in 2025		
<b>= Trustee account balance as at 31 December 2025</b>		<b>1,437,878.64</b>
Outstanding repayment in 2026 of administrative expenses from 2025		9,344.35
<b>Balance of trustee obligations as at 31 December 2025</b>		<b>1,447,222.99</b>
Approved grants pending disbursement Grants		
Committed funds from 2024	-478,464.10	
Committed funds from 2025	-735,458.10	-1,213,922.20
<b>Funds available in 2026</b>		<b>233.300.79</b>

#### 4.2.3.2 Private Broadcasting Fund

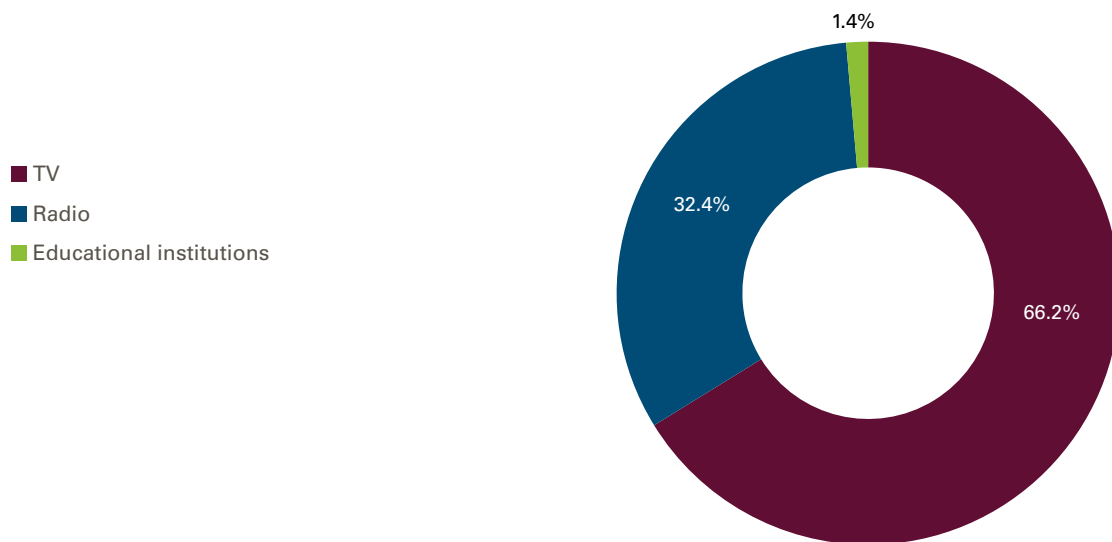
The Private Broadcasting Fund helps maintain and expand a versatile and innovative portfolio of high-quality programming in each of the coverage areas. It contributes significantly to the promotion of culture and cultural diversity in Austria, as well as Austrian and European consciousness, also by providing information and education to the population. At the same time, the fund helps to safeguard the competitiveness of the Austrian radio landscape, which is confronted with digitisation and an increasing globalisation of the media market at regional, national and European levels.

#### 4.2.3.2.1 Submission deadlines in 2025

During the first round and second rounds of submissions for 2025 (1–31 October 2024 and 15 April–15 May 2025 respectively), a total of 411 applications were submitted by radio broadcasters, 193 by television broadcasters and three by education and training institutions.

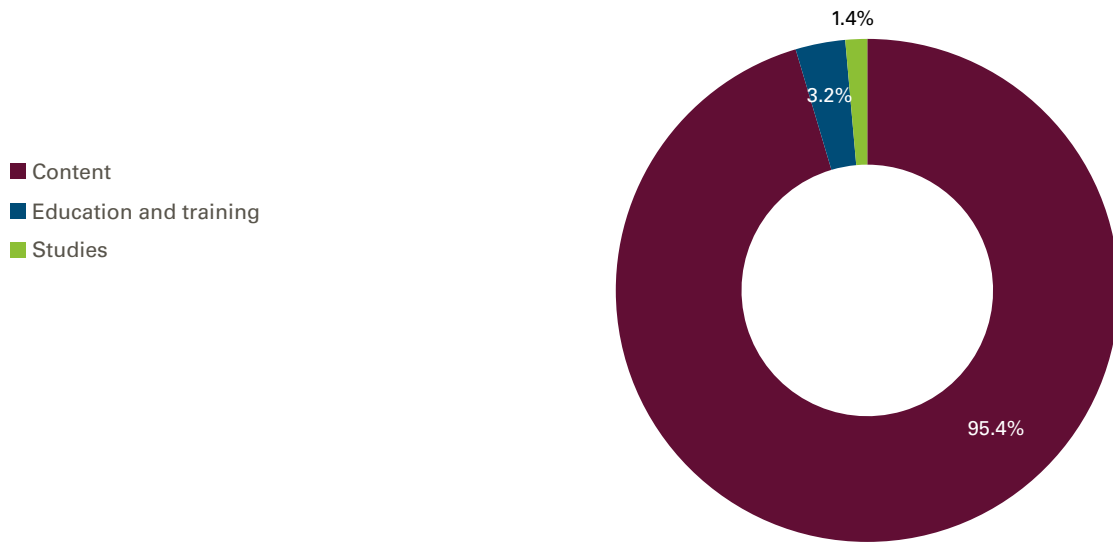
The fund awarded grants to 335 private radio broadcasters, 148 private television broadcasters and three educational institutions in radio broadcasting.

**Figure 33: Private Broadcasting Fund—grants approved in 2025**



Refunds and carry-forwards from the previous year meant that a total of EUR 28,146,748 was awarded in 2025. Of the funding, 66.2% (EUR 18,637,039) went to television, 32.4% (EUR 9,119,986) went to radio and 1.4% (EUR 389,723) was allocated to educational institutions.

**Figure 34: Private Broadcasting Fund—funding in 2025 by category**



Of the total funding awarded, EUR 26,849,523 (95.4%) were awarded for content creation, EUR 889,666 (3.2%) for education and training and EUR 407,559 (1.4%) went to reach surveys and quality studies.

Full details of the projects supported and the grant award guidelines are published on the RTR website at [www.rtr.at/privatrundfunkfonds](http://www.rtr.at/privatrundfunkfonds).

**4.2.3.2.2 Notes on the 2025 annual accounts**

Based on the statement for the trustee account as at 31 December 2024, and considering the credits and disbursements as well as the grants already approved but not yet disbursed, EUR 1,670,946.53 was available in the fund as at 31 December 2025; see the table below for details.

Table 50: Private Broadcasting Fund—excerpt from 2025 annual accounts

Private Broadcasting Fund	EUR	EUR
Trustee account balance as at 31 December 2024		16,985,309.68
<b>Credits</b>		
Revenues received in 2025	25,000,000.00	
Interest/fees	66,956.98	
Grant repayments	96,407.48	
Administrative expenses carried over from 2024	146,415.36	25,309,779.82
<b>Debits</b>		
Administrative expenses in 2025	-981,200.00	
Grant disbursements in 2025	-20,350,073.68	-21,331,273.68
Balance resulting after initial amount, credits and debits in 2025		
<b>= Trustee account balance as at 31 December 2025</b>		<b>20,963,815.82</b>
Outstanding repayment in 2026 of administrative expenses from 2025		49,221.71
<b>Balance of trustee obligations as at 31 December 2025</b>		<b>21,013,037.53</b>
Approved grants pending disbursement		
Committed funds from 2024	-4,422,060.50	
Committed funds from 2025	-14,920,030.50	-19,342,091.00
<b>Funds available in 2026</b>		<b>1,670,946.53</b>

## 4.2.4 Fund for the Promotion of Digital Transformation

Established by law on 13 April 2022, the Fund for the Promotion of Digital Transformation provides the Austrian media market with sources of funding that are aimed at maintaining the diversity of providers while promoting the establishment and expansion of digital services on the part of private media companies who orient their media content towards the Austrian public.

The fund is intended to strengthen Austrian media companies and their digital portfolios while generally reinforcing the central role played by media in a modern, democratic society.

It helps maintain and promote the pluralism of the news media sector, as well as strengthen professional journalism, a factor crucial to the long-term development of news media. Austrian media content—and regional content in particular—should continue to be made available to Austrian consumers.

The Fund for the Promotion of Digital Transformation, having a budget of EUR 20 million, is managed by RTR.

The fund is divided into two funding tracks. Incentive funding is aimed at project development, and applications for fund grants are accepted only from daily and weekly newspapers. The project funding track, allows applications to be submitted for digital transformation, digital journalism, or youth protection and accessibility.

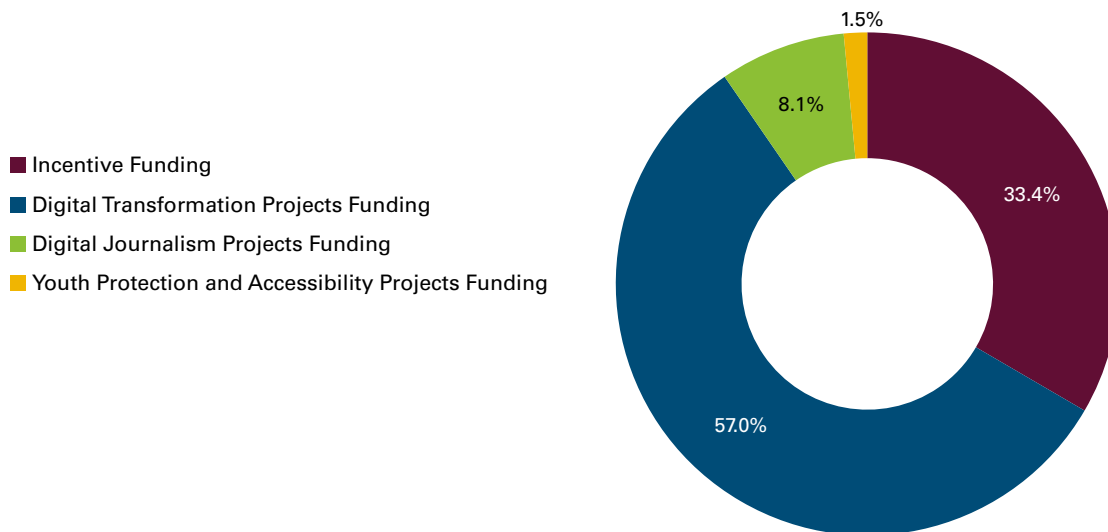
### 4.2.4.1 Submission deadline for the 2026 calendar year

The volume of funding requested during the application period of 1 June–30 June 2025—the fifth since the fund's inception—of around EUR 31 million once again significantly exceeded the funds that were available. Grants were awarded to 100 requests from broadcasters and print companies, of which 33 projects received incentive funding, while project funding was awarded to 15 digital journalism projects, 47 digital transformation projects, and five youth protection and accessibility projects.

Funds totalling EUR 18,778,139 were awarded. Of this amount, 33.4% (EUR 6,274,909) was awarded to incentive funding projects, 8.1% (EUR 1,522,161) for digital journalism, 57.0% (EUR 10,707,049) to digital transformation projects, and 1.5% (EUR 274,020) to projects involving youth protection and accessibility.

The figure below details how the awarded funds were distributed:

**Figure 35: Funding in 2026 by funding type**



Full details of the projects supported and the grant award guidelines are published on the RTR website at [www.rtr.at/fonds-digitale-transformation](http://www.rtr.at/fonds-digitale-transformation).

#### 4.2.4.2 Evaluation of the fund

An evaluation of the Fund for the Promotion of Digital Transformation was commissioned at the end of the year. The objective was to gain an extensive overview of how well the objectives defined in Articles 33a ff of the KommAustria Act (KOG) had been achieved.

Furthermore, current implementation and impact of the fund were to be analysed. In this way, an expertise basis was to be built for decisions about future changes to the guidelines and how to continue the fund.

The findings from the evaluation will be presented in early 2026 during an event to be held at RTR's premises.

#### 4.2.4.3 Notes on the 2025 annual accounts

Based on the statement for the trustee account as at 31 December 2024, and considering the credits and disbursements as well as the grants already approved but not yet disbursed, 4,482,043.83 was available in the fund as at 31 December 2025; see the table below for details.

**Table 51: Fund for the Promotion of Digital Transformation—excerpt from the 2025 annual accounts**

Fund for the Promotion of Digital Transformation	EUR	EUR
Trustee account balance as at 31 December 2024		10,734,761.39
<b>Credits</b>		
Allocation of revenues received in 2025	20,000,000.00	
Interest/fees	88,629.12	
Administrative expenses carried over from 2024	275,495.85	
Grant repayments	521,458.75	20,885,583.72
<b>Debits</b>		
Administrative expenses in 2025	-1,175,200.00	
Grant disbursements in 2025	-20,076,799.34	-21,251,999.34
Balance resulting after initial amount, credits and debits in 2025		
<b>= Trustee account balance as at 31 December 2025</b>		<b>10,368,345.77</b>
Outstanding repayment in 2026 of administrative expenses from 2025		43,071.98
<b>Balance of trustee obligations as at 31 December 2025</b>		<b>10,411,417.75</b>
Approved grants pending disbursement		
Committed funds from 2022	-4,861,870.80	
Committed funds from 2023	-2,368,573.62	
Committed funds from 2024	-5,196,721.00	
Committed funds from 2025	-7,040,068.00	
Funds allocated in 2026	20,000,000.00	
Committed funds from 2026	-6,462,140.50	-5,929,373.92
<b>Funds available in 2026</b>		<b>4,482,043.83</b>

## 4.2.5 Funding for the production of audio podcasts

The funding for audio podcasts introduced as specified in Art. 25a KOG, is allocated EUR 500,000 annually in response to the steadily growing importance of audio podcasts in the population's media consumption. It focuses on the expansion of high-quality productions in this segment and aims to significantly encourage public debate on social policy. To be eligible for funding, audio podcasts need to be published online on a regular basis and relate to issues surrounding information, culture, education, science, research or media and digital competence.

Support is provided for new episodes of previously existing podcasts that help strengthen understanding of democracy while contributing to a fact-based, responsible and respectful debate on social policy. Previous episodes will have demonstrated success in the market, based on a minimum number of downloads as set out in the funding guidelines. Funding supports productions in the areas of media and digital competence, information, culture, education, science and research.

### 4.2.5.1 Submission deadline for 2025

Applications could be submitted during the period between 1 September and 30 September 2025. A total of 16 productions from the field of daily, weekly and feature podcasts were submitted with an overall funding volume of EUR 553,647. Of these, ten projects fulfilled the specified criteria and received funding. Two projects involved a daily podcast, six a weekly podcast, while two projects fell under feature podcasts.

Funds totalling EUR 385,430 were awarded. Of this amount, 22.44% (EUR 86,500) was awarded to daily podcasts, 68.15% (EUR 262,670) to weekly podcasts and 9.41% (EUR 36,260) to feature podcasts.

Six of the submitted projects did not meet the requirements of the guidelines, with the result that no funding was awarded. Funds that have not been fully utilised are therefore available for the next submission deadline in September 2026.

An evaluation of the guidelines in consultation with the market is planned for prior to the next submission deadline, with previous experience gained from podcast-funding to be appropriately considered applied to further development.

#### 4.2.5.2 Notes on the 2025 annual accounts

Considering the credits and disbursements as well as the grants already approved but not yet disbursed, EUR 199,618 was available in the fund as at 31 December 2025; see the table below for details.

**Table 52: Audio podcast funding**

<b>Audio podcast funding</b>	<b>EUR</b>	<b>EUR</b>
Trustee account balance as at 31 December 2024		398,450.39
<b>Credits</b>		
Revenues received in 2025	500,000.00	
Repayment of administrative expenses from 2024	20,000.00	
Interest/fees	1,008.41	521,008.41
<b>Debits</b>		
Administrative expenses	0.00	
Grant disbursements in 2025	-196,239.61	-196,239.61
Balance resulting from initial amount, credits and Debits in 2025		
<b>= Trustee account balance as at 31 December 2025</b>		<b>723,219.19</b>
<b>Balance of trustee obligations as at 31 December 2025</b>		<b>723,219.19</b>
Approved grants pending disbursement		
Committed funds from 2024	-184,208.18	
Committed funds from 2025	-270,283.10	-454,491.28
<b>Funds available in 2026</b>		<b>268,727.91</b>



# Activities of the TKK

# 05 Activities of the TKK

The Telekom-Control-Kommission (TKK) was established in 1997 as an autonomous authority responsible for regulating the Austrian telecommunications market. Its tasks and responsibilities are specified in detail by law. In accordance with the Signature and Trust Services Act ([SVG](#)), it is also acts as the supervisory body for trust services. In the following we provide an overview of the main regulatory activities in the 2025 reporting year.

## 5.1 Measures to safeguard competition

### 5.1.1 Market analysis procedure

#### Market analysis procedure M 1.1/2020

With the issue of decision M 1.1/2020 in October 2022, the final sub-procedures of the market analysis procedure initiated in 2020 were completed, relating to the wholesale market for local and central access (formerly 'unbundling' and 'bitstreaming'). Due to the private-law wholesale contracts A1 offered and concluded for virtually unbundled lines and for access to high-speed broadband networks, no significant market power was identified on the aforementioned market. As a result, previous obligations specifically applying to A1—in some cases with transitional periods of one year for wholesale services for local access and two years for wholesale services for centralised access—were lifted.

After the specific obligations owing on A1 were either lifted or expired, RTR continued in 2025 to closely monitor changes in the conditions for purchasing wholesale broadband services, maintaining contact with both wholesale customers and A1 as the largest provider of such wholesale services. Where differences of opinion existed between wholesale customers and A1, solutions were identified in several cases.

The procedure before the Federal Administrative Court (BVwG) concerning decision M 1.1/2020 was still pending on the reporting date.

#### Market analysis procedure M 1/25

The TKK is entrusted with market definition and market analysis procedures, as specified in Articles 87 ff of the Telecommunications Act 2021 (TKG 2021). The TKK is to "initiate the procedure pursuant to Art. 207 [TKG 2021, i.e. a coordination procedure] within five years of adopting a previous measure relating to that market."

In March 2025, the TKK decided to initiate a new market analysis procedure pursuant to Art. 87 TKG 2021 and commissioned corresponding expert opinions.

### 5.1.2 Resolution of disputes between undertakings

Article 203 TKG 2021 contains provisions for the resolution of disputes between undertakings. Art. 203 Par. 1 relates to cases of disputes, where an operator or provider is subject to specific obligations under the TKG 2021, such as granting network access (based on a market analysis decision), or subject to obligations under other provisions of the TKG 2021, such as interconnection, and another operator, provider or undertaking is entitled to access obligations under the act. If despite genuine negotiations the two parties do not reach an agreement within a period of six weeks from receipt of the request, either party may appeal to the regulatory authority.

In accordance with Art. 203 Par. 3 TKG 2021, the TKK may also be called on for dispute resolution in cases where an operator makes access available to its network in the absence of a specific obligation and this operator fails to reach an agreement with another operator or provider concerning this network access, within a six-week period and despite negotiations.

If such a request for a dispute resolution procedure is received, RTR is to conduct a (six-week) dispute resolution procedure and endeavour to reach a mutually agreeable solution. If no agreement is reached, the TKK must continue the procedure and issue a decision in lieu of an agreement under private law.

During the reporting period, four procedures were brought before the TKK, of which three were still pending at the end of that period.

## 5.2 Net neutrality

Net neutrality refers to the equal treatment of all data transmitted via the internet. Equal treatment is independent of the sender, recipient, location, content, service or application. Net neutrality is important because it allows every internet user to retrieve and share information, content as well as services and applications. This helps ensure freedom of expression, economic growth and innovation through the internet. Working to protect net neutrality, the Telecoms Single Market (NN) Regulation has been in force at EU level since November 2015. The associated BEREC guidelines, which were adopted in August 2016 and most recently amended in June 2022, aim to ensure uniform implementation of the Regulation across Europe.

Work in the field of net neutrality was once again strongly informed in 2025 by international cooperation in the BEREC Open Internet Expert Working Group and by national procedures and advisory activities conducted in order to ensure the fulfilment of obligations under Regulation (EU) 2015/2120 laying down measures concerning open internet access (Telecoms Single Market Regulation; hereafter: TSM Regulation). As in previous years, monitoring of market developments and a review of internet access products were carried out. At the end of June 2025, the regulatory authority also published its Net Neutrality Report covering the period May 2024–April 2025. The stated measures are intended to safeguard the continued availability of internet access services at a level of quality that properly reflects advances in technology. In keeping with this aim and with best practice, dialogue has been maintained with all market participants. Providers regularly sought the advice of experts from RTR before the introduction of new products or services that could affect aspects of net neutrality. This approach allowed any related concerns to be resolved in advance.

Internet blocks were an issue for the regulatory authority again in 2025, not least because any such block—regardless of its basis—touches on the core principle of net neutrality, and forces providers into the unwelcome role of judges. Detailed observation was accordingly carried out of legislative activities at national and European level, with the resulting insights actively applied where appropriate when transposing EU-level provisions into national law.

More detailed analyses and legislative preparations were also completed for a telecommunications services quality-of-service ordinance, which aims to define the parameters to be surveyed for service quality, the measurement procedures to be used, and the content, format and nature of the particulars to be published. Scheduled to be issued in 2026, this ordinance aims to benefit end users through greater transparency and comparability among products offered on the Austrian market.

## 5.3 Spectrum issues—mobile and broadband

### 5.3.1 Preparations for the 2600 MHz and 2300 MHz award

The usage rights for frequencies in the 2600 MHz range, first awarded in 2010, expire at the end of 2026. In accordance with the current Spectrum Release Plan, this range was awarded together with the 2300 MHz spectrum band well in time before the usage rights expire. The regulatory authority began preparatory work in 2024 and published a comprehensive consultation on the key points of the award in December 2024. Among other things, the consultation resulted in important findings concerning the two ordinances issued by RTR and TKK in 2025 (see below). Award objectives and competition were also addressed, as was the product and auction design.

In the first quarter of 2025, RTR submitted the ordinance on frequency assignment limited in number (ZaBe-V 2023) for an evaluation pursuant to Art. 14 TKG 2021. RTR's ZaBe-V 2023 entered into force at the end of April 2023. Among other things, it defines the 2600 MHz range as limited by number. For the 2300 MHz range, this definition had been included in a 2023 amendment to the 2013 Frequency Utilisation Ordinance. The ordinance specifying the selection procedure pursuant to Art. 15 TKG 2021 (Auswahl-V 2025) was published for consultation in May 2025. The TKK's Auswahl-V 2025 subsequently entered into force in early July 2025.

In November 2025, a meeting of the (voluntary) peer review forum established by the TKG 2021 was held on RTR's premises. This session was also used to discuss the tender conditions for the aforementioned award. Apart from the regulatory authority itself, participants included representatives of the Federal Ministry of Housing, Arts, Culture, Media and Sport (BMWKMS), the Radio Spectrum Policy Group (RSPG), BEREC and the European Commission.

The public tender procedure, which was subject to a public consultation lasting until the end of September 2025, was launched in December 2025<sup>32</sup> (tender submission period ends 2 March 2026).

For details of the Spectrum Release Plan published by the regulatory authority and the responsible ministry in February 2022, please refer to last year's report. The conclusion of the auction marked the completion of all awards from the Spectrum Release Plan. An updated Spectrum Release Plan to cover the coming years is now being considered for 2026.

All documents relating to the frequency award procedure in question are published on the RTR website.<sup>33</sup>

### 5.3.2 Requests to extend spectrum usage rights in the 2600 MHz range

During the reporting year, applications to extend the existing spectrum usage rights were submitted by all three licence holders in the 2600 MHz range. The TKK rejected all of these requests pursuant to the applicable provisions of the TKG 2021. These provisions permit such an extension to be granted only if the possibility of an extension and related criteria were explicitly specified when awarding the usage rights—which was not the case with the award of the 2600 MHz band. A licence holder appealed the rejection decision; a ruling on the appeal was still pending as of the reporting date.

<sup>32</sup> [https://www.rtr.at/ausschreibung\\_f2\\_24](https://www.rtr.at/ausschreibung_f2_24)

<sup>33</sup> [https://www.rtr.at/TKP/was\\_wir\\_tun/telekommunikation/spectrum/procedures/FRQ\\_2300\\_2600\\_MHz/FRQ\\_2300\\_2600\\_MHz.de.html](https://www.rtr.at/TKP/was_wir_tun/telekommunikation/spectrum/procedures/FRQ_2300_2600_MHz/FRQ_2300_2600_MHz.de.html)

### 5.3.3 Request to amend the assignment decision with regard to the 700, 1500 and 2100 MHz ranges

One holder of usage rights in the 1500 and 2100 MHz ranges submitted a request to amend penalty regulations, specifically addressing the annual imposition of penalties in the event of a licence holder's failure to fulfil coverage obligations from the assignment decision as issued in 2020. Such penalties are to be imposed annually until the corresponding obligation has been fulfilled. The TKK rejected this request, as it did not meet the criteria for a subsequent amendment of rules specified by a decision. A licence holder appealed the rejection decision; a ruling on the appeal was still pending as of the reporting date.

#### Reviewing compliance with coverage obligations

As part of the second 5G spectrum auction in 2020, the TKK was careful to include a comprehensive set of coverage obligations, with the aim of ensuring the longer-term provision of high-quality 5G coverage across as wide an area as possible. To allow network operators sufficient time for deployment, the key dates for fulfilling individual coverage obligations were staggered over time.

As in previous years, the regulatory authority also conducted regular reviews of coverage obligations in 2025. Measurements in 2025 focused on two obligations: coverage for 74 urban areas, and coverage for cadastral municipalities with insufficient coverage. In the context of urban coverage obligations, extensive measurements were taken in selected urban areas where network coverage is declining in comparison with other such areas in Austria. As high coverage levels and very high data transmission rates were measured even for these urban areas, one may assume that all urban areas in Austria are supplied with wide-ranging, high-quality coverage and the obligations are indeed being properly fulfilled. The audits of cadastral municipalities continued uninterrupted from those conducted in previous years, with further sets of measurements being carried out for cadastral municipalities as of specified dates in 2023 and 2024 (a total of 545 cadastral municipalities). This involved measurements in more than 200 cadastral municipalities.

In the vast majority of cadastral municipalities with insufficient coverage, a significant improvement to coverage was found compared with the pre-auction level. The TKK discovered insufficient levels of coverage in a few cadastral municipalities, however, and correspondingly imposed penalties. Repeat measurements were already being conducted in 2025 for some of the cadastral municipalities with insufficient coverage. If a penalty is imposed as a result of non-fulfilment, the spectrum assignment decision requires measurements to be repeated after one year. Data from the first set of repeat measurements indicate that some breaches have yet to be remedied. Overall, the measurements taken to date have shown that the 5G auction obligations have already managed to achieve significant improvements to coverage compared with the situation in 2019.

Preparations were also undertaken in 2025 for reviewing the obligations for providing coverage along federal and regional roads, and to the national population, and for operating broadcasting locations in the 1500 MHz range. The TKK initiated the corresponding procedures for these activities.

## 5.4 Electronic signatures and trust services

As set out in the Signature and Trust Services Act (SVG), the TKK is the supervisory body for those trust service providers (TSPs), as defined in the eIDAS Regulation (910/2014), who are established in Austria.

### 5.4.1 Procedures before the TKK

By the end of 2025, the TKK had completed 33 procedures initiated during the year and a further four procedures that had been initiated in 2024. Six procedures—three from 2024 and three from 2025—were still pending at the end of 2025.

In 2025, four qualified TSPs were active in Austria. All qualified TSPs offered qualified certificates for electronic signatures. Four TSPs also offered qualified certificates for electronic seals, with three TSPs also offering qualified time stamps and two TSPs offering qualified certificates for website authentication. Qualified TSPs are required to undergo a conformity assessment by an accredited conformity assessment body every two years. In 2025, the supervisory body analysed the conformity assessment reports from four qualified TSPs. (The body also analysed a surveillance audit report submitted by the fifth qualified TSP as well as a conformity assessment report that merely addressed changes to the trust services as provided by this TSP.)

One qualified TSP was granted qualification status for a trust service involving the issuing of short-term certificates for the one-time creation of an electronic signature. The qualification status granted to this TSP for its existing qualified trust services was also extended to cover other (intermediate CA) certificates.

Ten procedures addressed changes to or the recertification of methods for the remote identity verification of certificate applicants. Five procedures involved other—mostly minor—changes to qualified trust services (with amendments being made in many cases to reflect new versions of technical standards, themselves resulting from changes in applicable legislation). In one case, the supervisory body oversaw the cessation of a qualified trust service.

In eight cases, the supervisory body took action on its own initiative in response to reported potential security breaches. Six of these procedures addressed errors made in the registration of certificate applicants or in the issuing of qualified certificates. In all of these cases, the affected TSPs cooperated in full by revoking or suspending the affected certificates without delay and taking appropriate action to avoid such incidents in the future. Two procedures concerned the remedying of potential technical vulnerabilities. No cases of identity theft were notified in 2025.

Two of the procedures initiated in 2024 concern providers of web browsers that do not recognise the qualified certificates for website authentication issued by an Austrian TSP—or only offer limited support for such certificates. As the EU Commission implementing regulation applying to such cases was issued only in December 2025, these procedures were still pending at the end of 2025.

## 5.4.2 Infrastructure

In supervisory operations, the TKK works through RTR, with the latter separately responsible for specified tasks. This applies especially to the infrastructure required to verify certificates, electronic signatures, electronic seals and electronic timestamps, all of which is operated by RTR. This includes:

- The 'trusted list' made available at [www.signatur.rtr.at/currenttl.xml](http://www.signatur.rtr.at/currenttl.xml) (a list of information related to TSPs and the trust services they provide, which is required to be made available in a standardised format by each Member State)
- The signature verification service made available at [www.signaturpruefung.gv.at](http://www.signaturpruefung.gv.at), which allows verification of electronic signatures, electronic seals and electronic certificates from other EU and EEA countries, where these items are listed in the trusted list for the particular country
- A 'trust infrastructure,' enabling the supervisory body to adopt the certificate database of a TSP that discontinues service

An extension to the verification service already commissioned in 2024 was completed in 2025. This extension means that electronic signatures and seals can now be verified in formats that ensure they remain capable of long-term validation. The service also now supports very large files, provides graphic highlighting of qualified electronic signatures and seals, and includes additional metadata in the verification results.



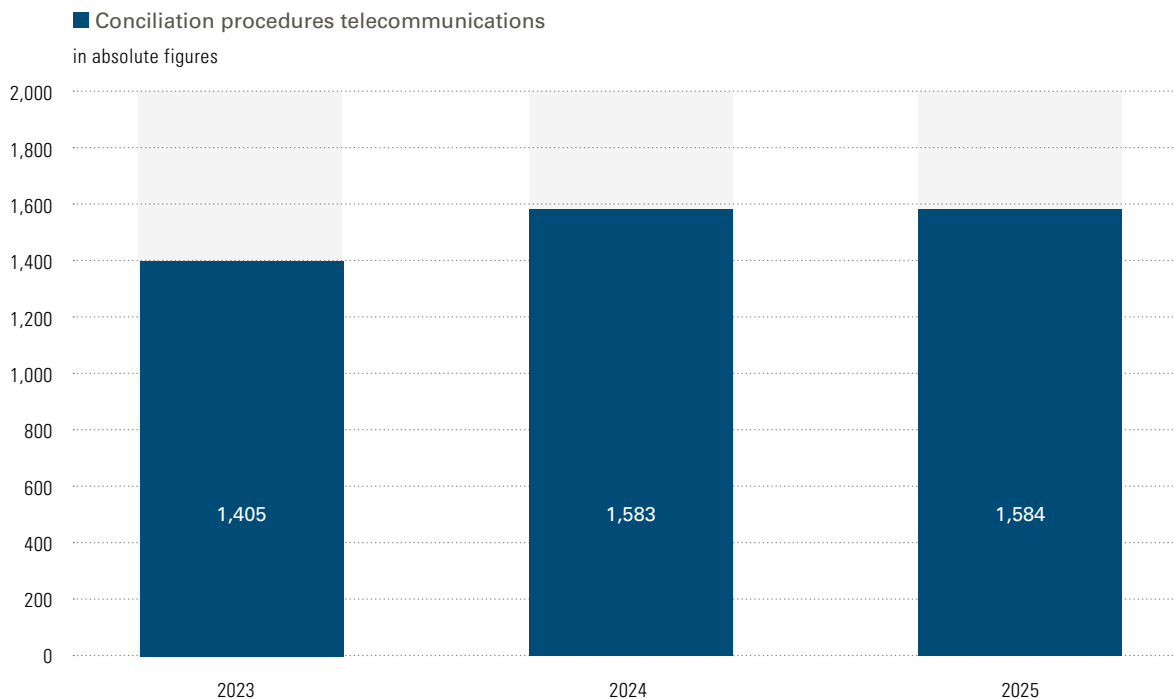
Activities of RTR:  
Telecommunications and  
Postal Services Division

# 06 Activities of RTR: Telecommunications and Postal Services Division

## 6.1 Conciliation procedures in telecommunications services

The number of conciliation procedures in the telecommunications sector rose by 0.1% and was thus essentially constant compared with 2024. As in previous years, most of the procedures concerned contractual difficulties, although the complaints addressed a wide variety of issues and had no particular thematic focus. A detailed presentation of conciliation activities in 2025 (in German) can be found in the [annual report by the conciliation bodies](#).

**Figure 36: Conciliation procedures involving telecoms, 2023–2025**



To improve the level of service offered to users for the electronic processing of their conciliation procedures, migration of the processing software to a new, service-specific tool was initiated in 2025. This migration will be completed in 2026. Service users will then benefit from a much improved experience when using a mobile device to access documents in their procedure file or exchange information with the conciliation body.

## 6.2 Reporting phone number misuse

Phone and text message fraud is an increasingly important topic of concern for Austrian users.

Where such activities lie within the RTR’s remit, the latter takes action to close potential points of entry for perpetrators of such scams. A key milestone was reached in 2024 with the entry into force of the ‘Anti-Spoofing Ordinance.’ Since that time, users can be confident that the Austrian number shown for an incoming call on their device’s display screen is indeed genuine.

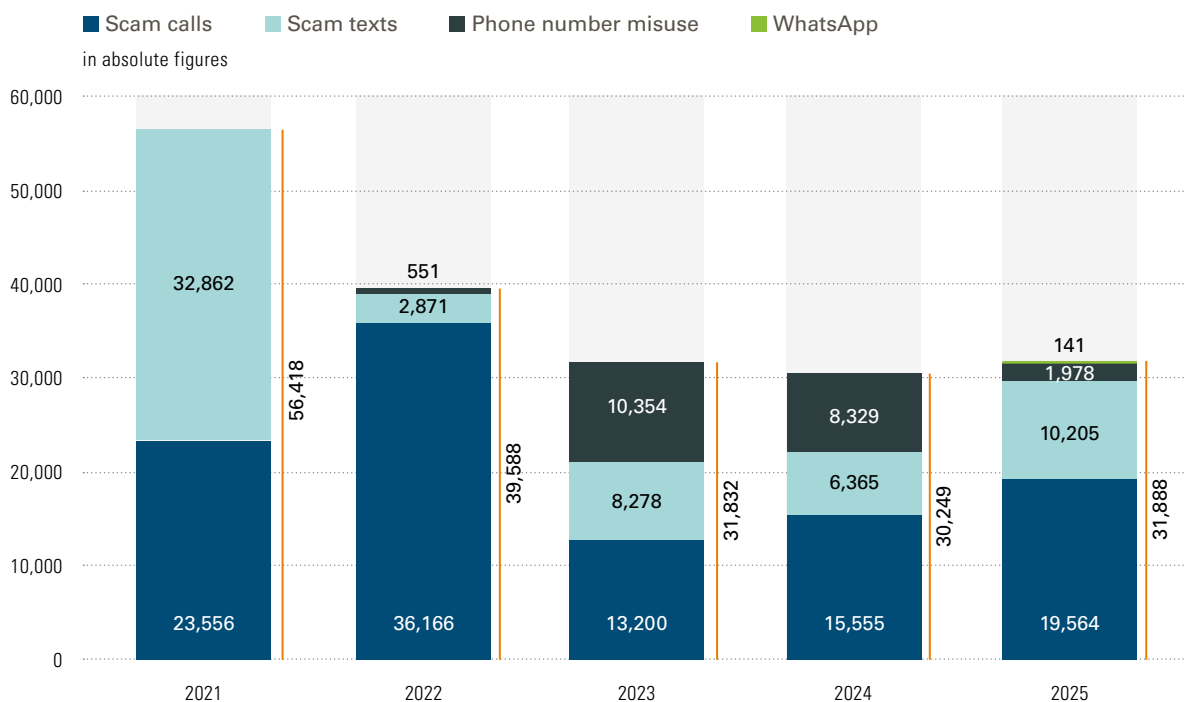
A further step was taken in 2025 with the launch of a consultation on another ordinance that aims to ensure the authenticity of the alphanumeric sender IDs that are used in text messaging; this consultation was still in progress on the reporting date. These IDs constitute the ‘sender name’ that is displayed instead of the phone number—such as ‘Finanzonline’ or the user’s bank. Fake IDs are currently simple to create and this loophole is naturally exploited by scammers to persuade users to respond to a fraudulent text.

All of these measures have been implemented in response to the insights garnered from reports that affected users have submitted to the [www.rufnummernmissbrauch.at](http://www.rufnummernmissbrauch.at) platform.

Compared with both prior-year periods, there was a sharp increase in reports of fraudulent calls and texts in 2025. The rise in reports of text scams is especially noteworthy.

After the reporting platform [rufnummernmissbrauch.at](http://rufnummernmissbrauch.at) added new functionality to permit the reporting of scam WhatsApp messages, 141 related complaints were received in the reporting year.

**Figure 37: Reports submitted by users to [www.rufnummernmissbrauch.at](http://www.rufnummernmissbrauch.at) 2021–2025**



## 6.3 Third-party services

Tracking the trajectories of complaints against third-party service providers forms an integral part of the annual body of work completed by RTR. This is because RTR may see a need to expand its regulatory interventions if complaint figures trend upwards. For this reason, number-independent third-party services such as mobile payment services have been monitored on a regular basis for several years. Number-based services—i.e. traditional value-added services—fall under the Communications Parameters, Fees and Value-Added Services Ordinance (KEM-V 2009), which has resulted in a steady decline in complaints. At this time, there is no need for regulatory intervention in third-party services. In 2025, a slight rise in the corresponding conciliation procedures was recorded. However, this cannot yet be considered to be a problematic development—at least in terms of the number of such procedures. On the other hand, the conciliation body identified some cases where the providers failed to address the issues raised in a way that would be deemed appropriate. There were some cases, for example, where the mobile phone bill was clearly being misused for illegal gambling activities. Despite receiving clear warnings, the providers continued to bill the corresponding fees and the payment option for this ‘service’ was not blocked.

**Table 53: Conciliation procedures involving third-party services, 2023–2025**

	2023	2024	2025
<b>Total number of conciliation procedures for telecommunications</b>	<b>1,405</b>	<b>1,583</b>	<b>1,584</b>
Procedures involving value-added text messaging	1	1	0
Procedures involving value-added voice services	4	3	5
Procedures involving number-independent third-party services	68	62	70

## 6.4 Ensuring legally compliant terms of contract

Providers must draw up contract terms and notify them to RTR in advance for review. RTR can reject the application of these contract terms to business transactions if the terms infringe any provisions of telecommunications law or certain points of civil or consumer protection law. A number of requirements relating to net neutrality are also reviewed, in this way ensuring compliance with these transparency requirements and thus safeguarding free access to the open internet.

Objection procedures conducted in the reporting year rose year on year by 92 to a total of 619. Numerous enquiries from both end users and providers were also handled on the subject of notifying or reviewing contractual conditions. Content reviews of terms and conditions focus not only on compliance with provisions of telecommunications law but also civil and consumer protection legislation. In detail, it became apparent in 2025 that more and more European and international undertakings are becoming active as providers on the Austrian market. In ensuring that contract terms comply with the law, RTR has been facing a new set of challenges, since some of these providers have only limited knowledge of the relevant substantive and procedural provisions of Austrian and EU law, and may also not have an adequate command of German as Austria’s official language.

RTR is primarily concerned with ensuring that telecoms make any necessary changes to contract terms already during procedures: this ensures that legal compliance is established as soon as possible. In every procedure in 2025, the TTK achieved this goal. For end users, checking through contract terms in advance reduces their risk of having to resort to the courts to clarify the legality of individual clauses once the contract has already been signed. Such legal proceedings are also associated with a very high financial risk. At the same time, end users are often unable to identify potentially unlawful clauses that are in fact unenforceable even though they have been agreed and included in the general terms of service. This practice of vetting

contract terms also makes an important contribution to fair competition between telecommunications service providers while also preventing any competitive edge through the use of unlawful terms. With a view to net neutrality breaches, the practice also enables monitoring and thus an early warning mechanism.

Alongside the advance checking of the general terms and conditions mentioned earlier, the regulatory authority also monitors activities of telecoms providers in the market and can initiate a supervisory procedure against a telecoms provider in the event of a breach of safeguard requirements, if the provider refuses to act to restore legal compliance in the matter. This offers a way of sanctioning those breaches that cannot be identified during advance checking of general terms and conditions or which first occur after contract conclusion. Seven supervisory procedures were still pending at the end of the period under review.

### **Roaming regulations**

In relation to legal obligations concerning roaming, monitoring and enforcement continued using tested methods. Specifically, the regulatory authority maintained regular dialogue with affected providers, so as to ensure that EU roaming regulations were made an integral part of contracts (general terms and conditions, fee provisions) and could be properly guaranteed. Any legal infringements were addressed with supervisory procedures, with responsibility here being assigned to the Telekom-Control-Kommission (TKK), and RTR's Telecommunications and Postal Services Division acting as its operative arm.

## **6.5 Services subject to notification requirements**

Pursuant to Art. 6 TKG 2021, the intent to provide a public communications network or to offer a public communications service as well as to modify or terminate such a network or service must be notified to the regulatory authority prior to the start of operation, modification or termination.<sup>34</sup>

In 2025, the regulatory authority focused on revising the categories used for notifying communication networks and services, in response to the legislative changes made in November 2021 (TKG 2021). As a result of these changes, all forms supported by the eRTR Portal had to be adapted to reflect the new definitions and new categories. Another consequence is that each holder of a general authorisation must now also take action to update their notification(s). RTR will continue to pursue this work actively in 2026.

To aid the reader in understanding the changes that have been made, the following table presents a side-by-side comparison of the former and most current categories.

<sup>34</sup> For further information on notification procedures, please refer to the Communications Reports of the previous years.

**Table 54: Comparison of categories pursuant to TKG 2003 and TKG 2021**

TKG 2003 categories	TKG 2021 categories
Public communications networks	Public communications network
Public telephone services at fixed locations and for mobile subscribers	Fixed number-based interpersonal communications service (fixed NB-ICS) or mobile number-based interpersonal communications service (mobile NB-ICS)
Public leased-line services	Data transmission service
Public internet communications services	Fixed internet access service (fixed IAS) and/or mobile internet access service (mobile IAS)
Other public communications services	Data transmission service
-	Roaming service

To ensure comparability between currently valid service notifications from previous years and those for 2025, the new category scheme has also been applied to the previous years. As a result, the figures given in Table 55 no longer correspond to those originally published in earlier communications reports.

**Table 55: Notified active services 2021–2025**

Service category	2021-12-31	2022-12-31	2023-12-31	2024-12-31	2025-12-31
Fixed/mobile NB-ICS	557	568	578	568	612
Fixed/mobile IAS	451	441	444	430	472
Public communications network	612	648	660	675	666
Data transmission service	125	133	139	144	142
Roaming service	-	-	-	-	-
<b>TOTAL services notified</b>	<b>1,745</b>	<b>1,790</b>	<b>1,821</b>	<b>1,817</b>	<b>1,892</b>

As of 31 December 2025, 1,892 active services had been notified by a total of 1,158 operators and providers. During 2025, a total of 103 operators and providers ceased operations, while 85 new operators and providers entered the market.

## 6.6 Communications parameters: administration of the Austrian number range

### 6.6.1 Consultation on an amendment to the 2009 Communications Parameters, Fees and Value-Added Services Ordinance (KEM-V 2009) concerning measures to guarantee the authenticity of alphanumeric sender IDs in text message services, and preparatory work in the context of the revised KEM-V 2009

With the tenth amendment to the KEM-V 2009, RTR aims to restore text messaging users' confidence in the authenticity of alphanumeric sender IDs for. The proposed changes would prohibit sender IDs that do not correspond discretely to the text message sender and thus do not allow unambiguous identification. To this end, RTR maintains a publicly accessible directory to which users can submit alphanumeric sender IDs for entry. This action was taken to put a stop to phone number spoofing, and its associated aspects of fraud and harassment.

To ensure market participant involvement, RTR launched a public consultation on the amendment on 15 December 2025 (consultation ends 20 February 2026). The proposed entry into force of the amendment is September 2026, which allows for the respective transitional periods due to the necessary implementation work needed on the part of network operators, providers and RTR.

Preparatory work for a full revision of the KEM-V 2009, which had become necessary as a result of the TKG 2021, was also completed in 2025. In particular, the ordinance envisages changing the usage requirements for geographic numbers to reflect the broader range of opportunities now offered by the widespread availability of new technologies (e.g. VoIP), along with a new voicemail scheme. A corresponding consultation will be launched in 2026.

### 6.6.2 Central number database (ZR-DB)

The central number database has been fully available to market participants since latter 2021, simplifying considerably regulatory activities in the areas of telephone number assignment and market supervision.

One notable achievement in 2025 was the resolution of performance problems with the ZR-DB, which had resulted from the steady growth of its database. A number of system upgrades for individual software components were also carried out with the aim of fixing vulnerabilities present in outdated versions and bringing the database up to date.

As already specified in 2025, the database will also facilitate the querying of location and subscriber data when responding to emergency calls. This work is planned for 2026.

Alongside implementation activities related to mandatory direct routing, other challenges for 2026 include the outsourcing of simple, operator-neutral processes (phone number setup, phone number routing) to the central number database (ZR-DB).

### 6.6.3 Reports detailing statistics on telephone number administration

In the 2025 reporting year, a total of 475 decisions were issued, with six applications receiving a negative decision. Applications were withdrawn in 22 cases. In the 2025 reporting year, 497 applications were processed and completed overall.

**Table 56: Decisions on telephone number requests, 2020–2024**

	2021	2022	2023	2024	2025
Number of decisions	741	563	479	514	475
Number of negative decisions	8	5	3	4	6

In 2025, RTR issued a total of six decisions, all of them positive, in the context of administering special communications parameters, which include mobile network codes, a basic and essential addressing element for mobile networks.

### 6.6.4 Public warning system (AT-Alert)

In Austria, the obligation to introduce a text-based public warning system has been implemented in Art. 125 TKG 2021 with the introduction of a cell broadcast service in all public mobile telecommunications networks. Warnings issued by the competent authorities are received by the respective regional warning centres and the federal alarm centre. The warnings are then routed to mobile network operators, who send these to all devices in the affected region rather like a radio broadcast. In this context, RTR is required to publish the issued warnings on a publicly accessible internet page ([warnung.at-alert.at/de](http://warnung.at-alert.at/de)) (see Art. 125 Par. 4 TKG 2021). RTR has also taken on additional administrative tasks relating to the networking of the participating organisations (federal alarm centre, nine regional warning centres, three mobile network operators and RTR).

In 2025, the regional warning centres and federal warning centre made 21 transmissions alongside the regular test messages and messages sent during the nationwide Alert Day on 4 October 2025.

The table below presents the number of transmissions from the federal warning centre and each of the nine regional warning centres.

**Table 57: Transmissions by warning centre in 2025**

Warning centre	Number of transmissions 2025
Federal warning centre	0
Burgenland	1
Carinthia	1
Lower Austria	0
Upper Austria	1
Salzburg	2
Styria	5
Tyrol	10
Vorarlberg	1
Vienna	0

Public warnings about smoke emissions from fires and extreme weather events were the most frequent type of warning.

## 6.7 Emergency communications

A reliable emergency communications systems is essential in a networked society. In Austria, with a complex topography consisting of urban centres, valleys and mountains, the precise geolocation of emergency calls and the sharing of location and subscriber data with stakeholders—control centres and operators alike—is especially challenging.

### Procurement of an LIS proxy server

A centralised Location Information Service (LIS) enables the reliable handling of emergency calls in real time across all devices and networks. In the reporting year, RTR therefore focused its emergency communications work on the specification and procurement of an LIS proxy server, which forms a core component of the interface between control centres and operators. This interface is required for the location/subscriber data requests that control centres need to submit to operators in an emergency, and is operated on behalf of RTR as a centralised service. Comprehensive tests of the new system are scheduled for the first six months of 2026.

Other emergency communications activities in the reporting year:

- Analysis and correction of misrouting cases
- Intervention in local emergency call service outages
- Case-by-case support for users facing problems with their devices, entailing issue analysis followed by proposed solutions (such as updating outdated firmware)
- Ensuring call-backs could be routed through to roaming subscribers

To ensure the quality and reliability of the emergency call systems, the emergency call role announced in the budget consultation is now a management-level responsibility within RTR. As a result, in an emergency the necessary technical solutions can be implemented promptly, with the aim of ensuring optimum accessibility and support.

## 6.8 Network deployment and infrastructure use

To promote the deployment of communications networks, the seventh section of the TKG 2021 sets out various infrastructure rights (wayleave rights, concurrent use rights, location rights and civil works coordination).

Since 12 November 2025, infrastructure rights are also explicitly established by the Gigabit Infrastructure Act (GIA, Regulation (EU) 2024/1309). Art. 3 GIA governs access (designated as 'co-use' by the TKG 2021), while Art. 5 GIA governs the coordination of civil works.

When expanding communications networks, operators have to route their infrastructure across private and public property. Operators can claim wayleave rights under these circumstances. Yet another option is to co-use existing infrastructure (masts, ducts, maintenance holes or lines) owned by other businesses, thereby reducing the costs of expanding fixed and mobile networks (co-use rights). Co-installation can also result in cost savings for excavation work (i.e. through coordination of civil works).

Parties unable to agree on the contents of infrastructure rights can request the TTK to take a decision. If this request meets the necessary conditions, RTR issues a decision in lieu of an agreement between the parties.

In the reporting period, a total of 27 requests were made to RTR for infrastructure rights. Most of these procedures involved an application for wayleave rights. One request concerned an infrastructure right pursuant to the Gigabit Infrastructure Act. This procedure was still pending as of the reporting date.

The decisions are available (in German) on the RTR website at [www.rtr.at/TKP/aktuelles/entscheidungen/uebersichtseite.de.html](http://www.rtr.at/TKP/aktuelles/entscheidungen/uebersichtseite.de.html).

Another 91 completed cases involving queries that did not lead to formal procedures also bear witness to the continued importance of infrastructure rights.

RTR also initiated an evaluation of the 2022 Ordinance on Reference Rates for Impairment (WR-V 2022) in the reporting year. This law sets out the reference rates to be used when compensating for the impairments to real estate caused by wayleave rights and location rights. The evaluation was still pending as of the reporting date.

## 6.9 Review of access offers

Pursuant to Art. 205 Par. 3 TKG 2021, RTR conducts reviews of BBA 2030 grant recipients on behalf of the Austrian Research Promotion Agency (FFG). According to programme conditions, recipients must publish details of reference offers of access to the fibre networks funded by grants. Typically, these are reference offers for active and passive network access. RTR prepares audit reports, which are then submitted to the FFG. In 2025, RTR audited 23 reference offers from nine grant recipients.

## 6.10 Ordinances

The TKG 2021 mandates regulatory authorities RTR and TKK with over 30 competencies for issuing ordinances. Apart from the continuation of a widely known authority to issue ordinances stemming from the TKG 2003, other, new legal foundations were also laid.

The TKG 2021 also requires the regulatory authority to conduct reviews (at least every three years) of ordinances previously issued, with the aim of assessing whether still appropriate and requisite to achieve the regulatory objectives. The result of the review is to be published on the regulatory authority's website.

During the reporting period, RTR issued or reviewed ordinances as presented below.

### 6.10.1 Revision of Itemised Bill Ordinance (EEN-V 2025)

The entry into force of the TKG 2021 established a new legal basis for the ordinance issued by RTR that specifies the level of detail for itemised bills and the format in which such bills are to be provided (Itemised Bill Ordinance, EEN-V). A revision of this ordinance in 2025—the 2025 Itemised Bill Ordinance—essentially adjusts the previous law (EEN-V 2021) to reflect the terminology used in the TKG 2021. A few material changes were also made as a result of the insights gained to date in the practical application of the law.

## 6.10.2 Amendment of Number Porting Ordinance (NÜV 2022)

As part of its legal mandate to evaluate ordinances, in early 2025 RTR identified a need to make changes to the legislation governing number portability. Specifically, changes were introduced to allow number porting in certain cases even if the user has not submitted any number porting information. This document, which must be issued to the end user by the previous provider contains the details of the user's phone number that the new provider needs in order to port the number successfully. Certain provisions of the ordinance were also specified in greater detail, especially in relation to the user's declaration of their intention to continue the contract. The amendment entered into force on 3 November 2025.

## 6.10.3 Evaluation of the ordinance concerning the limitation by number of frequency awards: no changes to ZaBe-V 2023

In fulfilment of its legal duty to perform routine evaluations of its ordinances, RTR launched a public consultation for an evaluation report on the ZaBe-V 2023 in early 2025.

The ZaBe-V 2023, which was published on 28 April 2023, establishes whether the award of a frequency sub-range should be limited by number or if such a limitation should not apply.

After evaluating the ZaBe-V 2023, RTR came to the conclusion that there were no grounds for making changes to this ordinance.

## 6.10.4 Other pending ordinance procedures

RTR was also involved in other ordinance procedures in the reporting period, but these activities had not been completed by the end of 2025. Key activities in this context included the following:

- The planned Location Ordinance aims to specify a number of details related to geolocation, particularly as regards accuracy and reliability, and as regards sharing the location details of the terminal device with other parties. The ordinance may additionally prescribe measures that enable and support the collection and transmission, to operators of emergency services, of location data determined from terminal devices. In late summer 2025, a public consultation was launched for a draft of a corresponding ordinance.
- Another pending procedure aims at issuing a Telecommunications Redundancy Ordinance. This ordinance will provide more detailed provisions for the design of technical facilities to ensure redundancy in the event of general technical faults, while observing the principle of proportionality and while taking into account the probability of occurrence.
- A draft of a Service Quality Ordinance was prepared during the course of 2025. This ordinance aims to create transparency for end users of internet access services and publicly accessible interpersonal communications services, while also promoting quality among market competitors. The draft ordinance sets out parameters for service quality while requiring certain information to be published. The draft also defines a package of measures to accommodate the needs of people with disabilities and to make sure that such individuals are able to make use of telecommunications services to the same degree as people without disabilities.
- In December 2025, a public consultation was launched for an amendment to the 2009 Communications Parameters, Fees and Value-Added Services Ordinance (KEM-V 2009). The amendment adds a new provision with measures that aim to guarantee the authenticity of alphanumeric sender IDs in text message services.

## 6.11 Security of networks and services

Since November 2011, operators of public communications networks or services have been required to report to RTR, according to a format specified by RTR, any security violation or impairment of integrity that has a considerable impact on network operations or the provision of services. RTR is in turn required to submit an annual report to the European Commission and to the European Union Agency for Cybersecurity (ENISA), describing the notifications received and the measures taken. RTR can also inform regulatory authorities in other Member States, ENISA or the public about certain notifications on an ad hoc basis. Here the goal of transparency nonetheless always needs to be seen in the context of requirements for protecting the privacy of provider data.

The EU's NIS 2 Directive was transposed into national law in Austria by the "Federal Act to ensure a high level of cybersecurity for network and information systems" (2026 Network and Information System Security Act, NISG 2026) of 23 December 2025. This act has introduced several substantive and operational changes, even though the NISG 2026 does not apply in full until the expiry of the transition period on 1 October 2026. For the 2025 period under review, implementation focused on the previous legislation (before the transposition of NIS 2).

### 6.11.1 National transposition of NIS 2

The adoption of the NISG 2026<sup>35</sup> on 23 December 2025 marked the long-awaited transposition of NIS 2 in Austria. This new law creates a Federal Agency for Cybersecurity and therefore a national regulatory authority for cybersecurity affairs at federal level. The act accordingly transposes the provisions of the NIS 2 Directive into national law.

The entry into force of the NISG 2026 introduces some key changes to the TKG 2021, previously the source of key provisions governing cybersecurity in the telecoms sector. In future, RTR will have the following remit in relation to cybersecurity:

- In cases where existing legislation is considered insufficient to maintain the security of networks and services, RTR is empowered to issue ordinances that require sector-specific details of technical and organisational security measures. Corresponding consent is required from the Federal Chancellery, the Federal Ministry of Housing, Arts, Culture, Media and Sport (BMWKMS), and the Federal Office for Cybersecurity.
- Completion of a sector risk analysis and report every two years in cooperation with the Federal Chancellery, BMWKMS, the Federal Ministry of the Interior (BMI), the Federal Ministry of Defence (BMLV), the Computer Security Incident Response Teams (CSIRTs), and the operators of fixed and mobile networks. The report will be provided to participating institutions and a sanitised version (reflecting the need to protect critical infrastructure) will be published on the RTR website.
- Co-authorship of a security policy template for operators
- Participation in ENISA working groups and the NIS Cooperation Group

Building on its previous cooperation with government agencies responsible for security and the telecoms sector, RTR will continue to support ongoing efforts to improve cybersecurity in Austria within the scope of its newly acquired competencies.

35 [https://www.parlament.gv.at/dokument/XXVIII/I/308/fname\\_1723244.pdf](https://www.parlament.gv.at/dokument/XXVIII/I/308/fname_1723244.pdf)

## 6.11.2 Reports of network failures

In 2025, eleven notifications of security incidents affecting electronic communications networks or services were submitted to the RTR's reporting portal. In each case, these resulted from the requirement to notify security incidents having a substantial impact.

In two of the notified cases, emergency numbers could not be accessed by certain users, with one case affecting 5,000 users for a duration of eight hours and the other case affecting an indeterminate numbers of users over a 90-minute period.

Two of the notified cases were attributed to criminal activities. In one case, a criminal actor was able to bypass spam protection for 61 users of a number-independent interpersonal communications service. Another case involved a ransomware attack on the internal systems of a communications network operator; the incident did not affect any end users.

All other cases concerned temporary issues affecting the availability of certain communications services. In one such incident, which affected around 1 million users, a system fault in a technical component took mobile telephony services offline for a period of 40 minutes. Another incident involved a cable failure that affected a total of 61 base stations. During the resulting outage, around 40,000 users had no access to mobile telephony or the internet for a period of 18 hours.

## 6.11.3 Security of 5G networks

Regulations for guaranteeing the security of 5G networks continue to be based on the EU Toolbox for 5G cybersecurity<sup>36</sup>, as published by the NIS Cooperation Group. Transposition of this EU-level policy framework into Austrian law is largely embodied in the Telecommunications Network Security Ordinance 2020 (TK-NSiV 2020). Alongside general regulations applicable to all communications networks and services, the Ordinance envisages specific security measures for operators of 5G networks with a mobile subscriber base of more than 100,000 customers. These include notification obligations, such as providing evidence of the existence of an information security management system (ISMS), submission of a declaration of conformity regarding the fulfilment of telecommunications-specific security standards, and regular submission of an overview in terms of function and manufacturer of the security-relevant components deployed to operate the 5G network. RTR received the required information from the affected network operators again in 2025.

At EU level, the RTR continues to support the work of the NIS Cooperation Group, particularly as regards the provision of technical expertise on 5G networks. In the course of 2025, a change in responsibilities occurred here, with the Federal Ministry of the Interior (BMI) now taking over the reins from the Federal Chancellery, which had previously been the competent authority for NIS activities. RTR is also an active member of a working group on cybersecurity at BEREC, which communicates regularly with the European Commission, ENISA and the NIS Cooperation Group, while contributing to a shared understanding of the measures in the EU Toolbox and striving for the harmonised application of these standards throughout the EU Member States.

## 6.11.4 Sector risk analysis

There were no significant developments in this context, primarily because the new NISG 2026 has now defined sector risk analysis, previously initiated and organised by RTR, as an RTR activity that is to be completed every two years. The next review of the RTR sector risk analysis for the telecoms sector will thus be completed in 2026.

36 Cybersecurity of 5G networks – EU Toolbox of risk mitigating measures, <https://ec.europa.eu/digital-single-market/news-redirect/667123>.

### 6.11.5 Cross-sectoral activities

In 2025, cross-sectoral cooperation with the energy sector continued, building on the activities stemming from the sector risk analysis as described above. Hosted jointly by the two parties, a series of workshops again focused on mutual interdependencies and cascade effects that impact both sectors, which make a shared approach to the mitigation of these cross-sectoral risks both prudent and necessary.

### 6.11.6 5G certification

The certification of products, services and processes is generally a tried and tested means for increasing security. As the same time, consideration should be given to not hindering the flexibility and innovation of an industry with frequent product and update cycles. Again in 2025, RTR cooperated with ad-hoc working groups (AHWG<sup>37</sup>), on the development of a 5G cybersecurity certification scheme. Work in relation to EU 5G certification focused primarily on the finalisation of the scheme for 5G network products based on GSMA NESAS.<sup>38</sup> This work will culminate in a proposed candidate scheme for the certification of 5G network products, which will be referred to as the EU NESAS scheme. The scheme will include descriptions of assessment procedures for 5G network products, including audit processes for their development and product lifecycle, as well as for certification procedures. While this scheme incorporates many elements from GSMA NESAS, with the aim of reducing workloads as far as possible for potential certificate holders, it also introduces specific EU NESAS elements based on the Cybersecurity Act (CSA<sup>39</sup>). In terms of technical elements, most of the potential adjustments identified have already been integrated with the GSMA NESAS methodology as part of scheme development work. This work was primarily undertaken because of the deep involvement of the GSMA NESAS group, who therefore made the necessary changes to its methodology in order to limit to an absolute minimum any differences to the requirements of the EU NESAS scheme. In future, the EU NESAS scheme could also serve as a starting point for the certification of network products other than 5G.

### 6.11.7 Network security advisory board

As a result of the entry into force of the Telecommunications Act in November 2021, an advisory board for security in electronic communications networks was set up for the first time, thus simultaneously fulfilling a corresponding requirement set out in the EU 5G Toolbox of risk-mitigating measures in relation to the cybersecurity of 5G networks from 29 January 2020. The advisory board consists of twelve experts from ministries and social partners as well as the Computer Emergency Response Team (CERT) and the Austrian Institute of Technology (AIT) who are appointed by the federal government to serve for four years. The position of board chair is held by the Managing Director of RTR's Telecommunications and Postal Services Division, and RTR additionally provides operational support. The tasks of the advisory board include:

- Advising the Federal Ministry of Housing, Arts, Culture, Media and Sport (BMWKMS), responsible for the telecommunications agenda, on general aspects of the security of electronic communications networks
- Ongoing monitoring of the technological developments in the area of security components and services for such networks
- Publishing of an annual status report
- Drafting of expert opinions for procedures within the BMWKMS relating to any classification of a manufacturer of network components or a provider of services for such networks as a high-risk supplier (this is a supplier considered very likely to be unable to comply, either at all or consistently, with applicable EU standards, especially with respect to information security and data protection)

37 Ad-Hoc Working Group (AHWG) on 5G Cybersecurity Certification, [https://www.enisa.europa.eu/topics/certification/copy\\_of\\_adhoc\\_wg\\_calls/ad-hoc-working-group-on-5g-cybersecurity-certification](https://www.enisa.europa.eu/topics/certification/copy_of_adhoc_wg_calls/ad-hoc-working-group-on-5g-cybersecurity-certification)

38 <https://www.gsma.com/solutions-and-impact/industry-services/assurance-services/network-equipment-security-assurance-scheme-nesas/>

39 <https://eur-lex.europa.eu/eli/reg/2019/881/oj/>

One of the activities of the advisory board in 2025 was its submission of the annual status report for the 2024 calendar year to the competent Federal Minister for Housing, Arts, Culture, Media and Sport. A summary of the 2024 status report approved for public release is available as a download from the RTR website.<sup>40</sup> The advisory board also spent a total of three sessions in 2025 discussing advances in security technology and working on the content of the 2025 status report. The annual status report for 2025 is scheduled for submission to the competent Federal Minister for Housing, Arts, Culture, Media and Sport during the first half of 2026.

## 6.12 Single information points for infrastructure data and broadband coverage: Information hubs for telecommunications network operators

A package of legislative measures has been introduced to reduce the cost of deploying high-speed networks and enable documentation of broadband internet coverage. These measures include the establishment of the ZIS and ZIB single information points as well as the publication of information about approvals.

A full introduction to the information points is provided on the website under [https://www.rtr.at/TKP/was\\_wir\\_tun/telekommunikation/zentrale\\_informationsstellen/ZIB\\_ZIS.en.html](https://www.rtr.at/TKP/was_wir_tun/telekommunikation/zentrale_informationsstellen/ZIB_ZIS.en.html) with further details given in the communications reports for previous years.

### 6.12.1 Single information point for infrastructure data (ZIS)

The Single Information Point for Infrastructure Data (ZIS) was established at RTR in 2016 and since manages a directory of all existing and planned infrastructure expansion that can be used for telecommunications purposes. The ZIS permits the simple exchange of information about existing infrastructure and planned construction work, and consequently facilitates the efficient co-use and installation of infrastructure.

#### ZIS as a data hub for the telecoms market

Austrian municipalities, other public bodies, providers of public communications networks, and companies operating physical infrastructure for oil, gas, electricity, district heating, water, funicular railways or transport must report existing infrastructure data and planned construction projects to ZIS in a digital format. To ensure both the quality and the completeness of the data reported, on uploading, data are manually reviewed and approved by RTR as part of the reporting process.

The ZIS is not a public directory. Only providers of public communications networks are entitled to query infrastructure data, being only parties entitled to co-use under the Telecommunications Act (TKG). Information about planned construction work can be queried by all companies who have reporting obligations.

More detailed information on the ZIS is published on the RTR website at [https://www.rtr.at/TKP/was\\_wir\\_tun/telekommunikation/zentrale\\_informationsstellen/zis/ZIS.en.html](https://www.rtr.at/TKP/was_wir_tun/telekommunikation/zentrale_informationsstellen/zis/ZIS.en.html).

### 6.12.2 Geographical surveys of broadband coverage levels

The geographical surveys of broadband coverage levels (ZIB) were introduced at RTR in July 2019. Since then, data has been collected on the current and planned coverage of broadband connections in telecommunications networks for both fixed and mobile networks. Based on these data, information on data transmission speeds, technologies, active connections and procured wholesale services is recorded. Besides supporting companies in making data available, RTR is tasked with data verification and organisation, with the goal of providing an up-to-date picture of broadband coverage in Austria.

40 [https://www.rtr.at/TKP/aktuelles/publikationen/publikationen/Wahrnehmungsbericht\\_2024.pdf](https://www.rtr.at/TKP/aktuelles/publikationen/publikationen/Wahrnehmungsbericht_2024.pdf)

Providers of public communications networks and providers of public communications services are required to supply data. Every year, the companies are requested by RTR to report their most recent data as well as planned rollout projects to the ZIB.

Unlike the data in the ZIS, information about broadband coverage is used for market analysis and published in the quarterly RTR Internet Monitor. These data are also made available to the Broadband Office within the Federal Ministry of Housing, Arts, Culture, Media and Sport (BMWKMS) in order to generate the funding maps for publication in the broadband atlas.

To safeguard the quality of the above-mentioned products and the completeness of data supplied, RTR had to warn two companies that missed the deadline and notify these to the telecommunications office in 2025. RTR will move this warning/notification work to a quarterly cycle in 2026.

### **Changes to the dataset for ZIB data reporting**

In 2025, work focused on the development and implementation of a new address, building and real estate database, intended to support future ZIB reporting in the A10 and A30 categories—i.e. fixed-network coverage and planning data. The database concept and an initial proposal for the data structure were sent to the data suppliers for feedback early in the year.

Following this, RTR also signed an agreement with Statistics Austria that authorised the use of data from the latter's address, building and apartment register (AGWR).

RTR used the AGWR data and information from the Digital Cadastral Map (DKM) maintained by the Federal Office of Metrology and Surveying (BEV) to create a new register of homes passed. This register can be used in future for telecommunications network planning, rollout and operations work, and for meeting legal obligations towards RTR.

Data on these homes passed is provided via the ZIB Portal as a download service, via a REST API developed in-house and by means of an Excel-based data preparation tool.

A pilot (parallel) rollout was set up in the ZIB Portal in October 2025 and will run until June 2026. During this period, companies required to report to ZIB can choose to report the relevant A10 and A30 category data at grid level or may already switch to using the homes passed level. The switchover to the homes passed level will be finalised from July 2026 onwards.

Further information about the ZIB has been published on the RTR website at [https://www.rtr.at/TKP/was\\_wir\\_tun/telekommunikation/zentrale\\_informationsstellen/zib/ZIB.en.html](https://www.rtr.at/TKP/was_wir_tun/telekommunikation/zentrale_informationsstellen/zib/ZIB.en.html).

## 6.13 International activities

### 6.13.1 RTR and BEREC

The Body of European Regulators for Electronic Communications (BEREC) is the key force behind the further development and functional optimisation of the European single market for electronic communications networks and services. A core focus of the work conducted at BEREC is to ensure the coherent and uniform implementation of the European legislative framework for electronic communications. This work promotes the interests of citizens by guaranteeing comprehensive connectivity as well as the broad availability and utilisation of advanced networks.

BEREC also assists and advises the national regulatory authorities, the European Parliament, the Council of the European Union and the European Commission in detailing legislative proposals in the field of electronic communications and in handling complex technical issues.

RTR is intensely involved in BEREC, engaging in activities at all levels, including the Board of Regulators, the Contact Network, twelve topical working groups and three expert networking groups.

RTR's experts work to represent Austrian interests at BEREC wherever necessary. They play a major role in the preparation of opinions, guidelines, reports, recommendations and joint opinion papers, and simultaneously benefit from talking to international colleagues and learning about best practices. Of particular note is the International Roaming working group, which is co-chaired by an RTR expert who plays a leading role in the coordination of group activities.

#### 6.13.1.1 Major projects completed by BEREC in 2025

Operational activities at BEREC are primarily handled by its twelve topical working groups. Within these groups, experts from the participating regulatory authorities prepare initial drafts that are then developed further by the Contact Network. The drafts are ultimately submitted to the Board of Regulators for final discussion and a decision.

This section presents a compact overview of some of the most important activities at BEREC in 2025.

One important project was the publication of BEREC's input to the European Commission's call for evidence on its planned legislative initiative—the Digital Networks Act. The preparation of this contribution was coordinated by the Regulatory Framework working group. In that input, BEREC analysed the strategies adopted by the European Commission to shape the future of Europe's digital sector, and provided expert assessments of technological developments and market trends. Key topics covered by this analysis include the application scope and objectives of the regulatory framework, access regulation, spectrum management, the copper network switch-off, options for simplifying procedures and reducing administrative burdens, and questions relating to the European governance structure in the telecommunications sector. BEREC's general view here is that competition remains the most effective instrument for promoting investment and innovation on the part of operators, while also underlining the need for ex-ante SMP regulation to safeguard effective competition and investment security. At the same time, BEREC calls for more efficient procedures with fast-tracking of regulatory decision-making, while being careful to point out that simplification is not synonymous with deregulation. With reference to the regulatory framework's scope of application, BEREC notes that, in efforts to guarantee a level playing field, the increasing virtualisation of networks, the stronger centralisation of network management functions and the growing importance of cloud solutions must be considered. In light of these facts, it therefore appears advisable to update and extend the terms, definitions and taxonomies included in the European Electronic Communications Code (EECC).

As in consolidated practice, the International Roaming working group prepared some important benchmark and monitoring reports based on consolidated European data. These analyses illuminate developments in international roaming (use of mobile services outside the home country) and intra-EU communications, including calls made or texts sent from a user's home country to another EU or EEA member country. The

working group also prepared several important technical opinions, including BEREC's opinion on the review of the Roaming Regulation and the Commission implementing regulation on intra-EU communications. Last but not least, the working group also contributed a significant level of expertise to the preparations for Ukraine and Moldova joining the 'Roam Like At Home' roaming framework on 1 January 2026.

The Planning and Future Trends working group coordinated the preparation of the BEREC Strategy 2026–2030. The first section of this strategy provides an overview of key market and technology trends as well as significant changes in the legislative framework. Both areas are undergoing deep structural change or will do so in the near future. In the field of technology, significant progress is being made in artificial intelligence, edge computing, cloud and virtualisation, and non-terrestrial networks. Work to further improve 5G networking and to research 6G networks also continues apace. The European Union's regulatory sphere is also undergoing a phase of comprehensive reforms. Noteworthy developments here include the upcoming overhaul of the European Electronic Communications Code (EECC) and the Roaming Regulation, as well as the planned legislative initiative for the Digital Networks Act. In response to these developments, the strategy defines five strategic priorities, derived from the general objectives of the EECC: (1) promoting full connectivity and the Digital Single Market; (2) supporting competition-driven and open digital ecosystems; (3) empowering end users; (4) contributing to environmentally sustainable, secure and resilient digital infrastructures; and (5) strengthening BEREC's capabilities and continuous improvement. The strategy concludes with a section on institutional and international cooperation.

The Market and Economic Analysis working group prepared several important documents during the reporting year, including BEREC's input to the European Commission's revision of the recommendation on relevant product and service markets. In this opinion, BEREC underlines the importance of ex-ante SMP regulation as an indispensable instrument wielded by national regulatory authorities. As such, the recommendation remains a key element for ex-ante regulation in many Member States. In its opinion, BEREC argues that markets 1 and 2 as defined by the 2020 recommendation continue to satisfy the three criteria for market inclusion in many Member States, and is therefore opposed to repealing the recommendation. The working group also prepared BEREC's input for the public consultation launched by the European Commission to review the EU merger control guidelines. Specifically, BEREC reiterates its support for objectives based on competition and case-by-case assessment, while objecting to 'one size fits all' approaches.

An important project tackled by the Fixed Network Evolution working group was the development of two guidelines for the Gigabit Infrastructure Act (GIA). The first guideline addresses the coordination of civil works pursuant to Art. 5(6) GIA and deals among other things with the apportionment of the resulting costs, together with the rules to be applied by the national dispute settlement bodies when ruling in such cases. The guideline also covers the criteria for ensuring sufficient capacity to meet reasonably foreseeable future demand where civil-works coordination is refused. The second guideline covers the conditions for access to physical infrastructure inside buildings pursuant to Art. 11(6) GIA. The guideline aims to provide input for defining fair and reasonable access conditions, and to establish a set of criteria to be applied by dispute settlement bodies when assessing and resolving such cases. Last but not least, the working group also updated the BEREC Guidelines on Very High Capacity Networks. These updated guidelines confirm the performance thresholds as specified in 2020 for 'criterion 3', which defines specific performance requirements for fixed-line networks. These performance requirements include downlink and uplink bandwidth, resilience, error-related parameters, as well as latency and related variation.

Core activities of the Remedies and Market Monitoring working group included preparing BEREC's opinion on the review of the functioning of Commission Delegated Regulation (EU) 2021/654 on the setting of maximum Union-wide termination rates. In its opinion, BEREC concludes that the introduction of 'Eurorates' did not ultimately have any material negative impacts on market dynamics, nor on wholesale and retail prices. As regards the level at which the Eurorates should be set, BEREC emphasises that the assumptions underlying the cost models must be realistic for all operators—including those in smaller markets. BEREC considers the results of the updated cost model—and the fact that no burdens on network operators or inflated retail prices were identified—to provide sufficient grounds for maintaining the Eurorates at their current level. Other work completed by the working group included the annual 'Regulatory Accounting in Practice' report as well as updated BEREC guidelines on the geographic surveys performed for network rollout, which help to support standardised surveys and reliable forecasts.

Activities of the Wireless Network Evolution working group included a report on the development of private 5G networks in relation to public networks in Europe. This report sets out BEREC's provisional assessments regarding the current state of play, the most important requirements as well as key regulatory questions pertaining to the introduction of private 5G networks. The analysis is largely based on an internal survey conducted among national regulatory authorities. The results of this survey show that only a few specific national frameworks have been introduced for private networks and that existing regulations are strongly aligned with national requirements. The survey also highlights the 3400–4200 MHz frequency range as the spectrum most commonly used for private 5G networks in Europe. There are many reasons for deploying a private 5G network, chief among them being technical benefits such as very low latency or the especially high levels of availability in protected environments. Other motives include the optimisation of security and trust levels for business-critical information, cost efficiency issues, a need to deploy specialised technical solutions and a desire to avoid creating dependencies on individual providers (i.e. vendor lock-in). These priorities will vary significantly from one use case to another. Alongside this report, the working group also organised an internal workshop programme, with three sessions dedicated to direct-to-device (D2D) satellite communications. The workshops focused primarily on the roles and interrelationships of the various actors involved in providing these kinds of services. The ultimate aim of the programme was to obtain a clearer picture of potential system architectures, core interfaces and the participating customers, end users and network components.

Activities of the End Users working group included the preparation of BEREC's input on the European Commission's call for evidence for the Digital Fairness Act. In this opinion, BEREC expresses its general support for the initiative to foster more digital fairness and restrict harmful online practices. At the same time, BEREC emphasises the need to coordinate the new legislative framework with existing and planned EU legislation, so as to ensure its effectiveness while guaranteeing coherence and legal certainty. In the case of electronic communications, BEREC argues that new rules should supplement rather than replace sector-specific regulations, as horizontal consumer protection legislation is unable to cover the specific characteristics of this sector on its own. BEREC also underlines the importance of giving the legislative framework enough flexibility to respond promptly to new digital risks such as manipulative designs, unfair contract conditions or fraudulent activities. Other important topics include accounting for behavioural factors in consumer decision-making and the integration of ecological aspects for sustainable consumer choice, as well as effective enforcement mechanisms and close cooperation with the competent authorities. BEREC concludes its opinion with a reminder that a 'simplification' of the EU legislative framework does not imply 'deregulation' and that the competent authorities must have the domain expertise needed to readily identify unfair practices as well as the appropriate powers to prevent them.

The Digital Markets working group carried out a broad portfolio of work, which included preparing BEREC's input on the consultation held by the European Commission as part of the first review of the Digital Markets Act (DMA). BEREC offers general support for the DMA's objectives of creating fair and competitive digital markets to the benefit of consumers and businesses, but also calls for continually adapting the legal framework to especially address emerging challenges. One focus of the consultation input is number-independent interpersonal communications services. In this context, BEREC cites existing hurdles to interoperability and suggests expanding the scope of the interoperability obligations provided for by Art. 7 DMA to communications between all users. BEREC also reaffirms its readiness to support the Commission in reviewing gatekeeper reference offers. Turning to cloud services, BEREC notes the high level of market concentration and potentially unfair business practices, and speaks in favour of nominating gatekeepers for this core platform service to counter market distortion and supplement the Data Act. Other important activities of this working group include a report on national undersea cables, an internal report on the integration of artificial intelligence into the telecommunications sector, and a BEREC opinion on Meta's reference offers concerning the interoperability of Messenger and WhatsApp pursuant to Art. 7 of the Digital Markets Act.

Projects tackled by the Sustainability working group included organising an external workshop on the ecological design of digital services for more environmentally friendly networks and ICT systems. This event sought to achieve a deeper understanding of the ways in which ecological design principles can be applied to digital service development, with the aim of more sustainable networks and ICT applications. Existing instruments, frameworks and good practice examples that facilitate the design of sustainable digital services were presented during the workshop. The event brought together a wide range of stakeholders—representing

regulatory authorities, public organisations, consumer organisations, scientific research, private enterprise and environmental groups—to obtain a comprehensive overview of current initiatives and perspectives on the ecological design of digital services. The working group also organised a second workshop on the environmental impact of satellite constellations. Recent environmental impact assessments covering the entire lifecycle of such constellations were presented, also addressing the challenges presented by the limited data available and the evaluation of various types of environmental impacts. Other aspects, such as space debris, light pollution (especially in terms of effects on astronomical observations, weather forecasting and nocturnal ecosystems) and planetary boundaries were also discussed, as was the environmental impact of ground-based infrastructure such as satellite dishes and data centres.

The work of the Open Internet group included the preparation of the “BEREC Report on the implementation of the Open Internet Regulation”. This report offers an overview of the work carried out by the national regulatory authorities (NRAs) for the implementation of the Open Internet Regulation and the associated BEREC guidelines. The report points out how the monitoring and enforcement measures adopted by the NRAs over the last nine years have led to a consistent and harmonised application of the regulation. Subsequently, the freedom to innovate has been safeguarded while effectively protecting the rights of end users.

As in previous years, the Cybersecurity working group addressed key issues within cybersecurity and the resilience of electronic communications networks, while also working closely with other European institutions and agencies, especially ENISA.

A full list of all of the documents published by BEREC in 2025 is available on the official BEREC website and is also included in BEREC’s Annual Report for the same year.

### 6.13.2 DMA High-Level Group

The High-Level Group (HLG) for the Digital Markets Act (DMA) plays a major role in helping to maintain the presence of fair and competitive digital markets in the EU. Established in March 2023, the group is made up of representatives of several important European bodies and networks, including the Body of European Regulators for Electronic Communications (BEREC), the European Data Protection Board (EDPB), the European Competition Network (ECN) and the European Board for Media Services (EBMS). The primary purpose of the High-Level Group is to provide the European Commission with advice and expertise, with the aim of achieving the coherent application of the DMA and other sectoral regulations for gatekeepers.

In 2025, Klaus M. Steinmaurer, Managing Director of the Telecommunications and Postal Services Division at RTR, was reappointed as one of the six individuals who represent BEREC in the DMA High-Level Group.

Artificial intelligence (AI) was an important topic for the HLG in 2025. The High-Level Group adopted a joint paper<sup>41</sup> that analyses the complex regulatory interrelationships between the DMA and other EU legislation such as the AI Act and the GDPR. The paper focuses on strategies for safeguarding fairness and competition within the AI value chain, especially in consideration of gatekeepers’ privileged access to critical infrastructure such as cloud computing and valuable user data. The document cautions against risks arising from the integration of AI assistants into existing gatekeeper ecosystems, including the risks of self-preferencing and user lock-in. To avoid a fragmented supervisory landscape, the paper proposes closer cooperation among authorities as well as the use of a unified terminology, which would also increase legal certainty for small and medium-sized enterprises (SMEs).

41 HLG (2025), “HLG Joint paper by the members of the HLG on Artificial Intelligence – Mapping out regulatory interplay related to AI issues”, [https://digital-markets-act.ec.europa.eu/document/download/f30a6d1d-8837-4b64-a385-f79969446404\\_en?filename=HLG%20Joint%20Paper%20on%20AI\\_as%20endorsed%20on%2012%20Dec%202025.docx](https://digital-markets-act.ec.europa.eu/document/download/f30a6d1d-8837-4b64-a385-f79969446404_en?filename=HLG%20Joint%20Paper%20on%20AI_as%20endorsed%20on%2012%20Dec%202025.docx)

The majority of the HLG's expert-level work is completed by its specialised subgroups. Each of these three subgroups concentrates on a separate subject field, from data-related obligations to interoperability and artificial intelligence. Regular dialogue is encouraged between these subgroups to support extensive cooperation among members and sharing of expert knowledge. As part of the BEREC delegation, RTR's experts working in its Telecommunications and Postal Services Division also contribute to these discussions.

### 6.13.3 RTR and OECD

The OECD is an international organisation that has set itself the goal of promoting economic prosperity, justice, opportunities and quality of life. The OECD serves as a clearing house for the exchange of knowledge, data and evaluations, and the sharing of best practices. In 2025, RTR once again represented Austria in the Working Party on Connectivity Services and Infrastructures (WP CSI), which focuses on communications infrastructures and services.

Two issues tackled by the working party in 2025 were the sustainability and security of communications networks. One report, entitled "The environmental sustainability of communication networks", addressed the impacts—both positive and negative—of communications networks on the environment. After discussing the methods used to measure these effects, the report authors then highlight strategies for improving the alignment of digital and green policies by presenting initiatives from both OECD member states and private enterprise. Often referred to as the 'twin transition', the digital and green transitions are becoming increasingly interlinked, with communications networks playing a crucial role. The report highlights the need for harmonised methods to measure the environmental impact of digital technologies as well as the role of national regulatory authorities.<sup>42</sup>

A second report, entitled "Enhancing the resilience of communication networks", underlines the critical role of resilient communication networks in a world increasingly dependent on connectivity. The report outlines the challenges policymakers face in protecting networks from system failures, malicious actions and natural disasters. Key strategies for enhancing resilience include redundancy, diversity and the adoption of innovative technologies such as cloud integration, AI and software-defined networking. The report also emphasises the value of organisational measures such as crisis simulations and business continuity management. The report offers insights into current policies in OECD member countries while setting out recommendations for strengthening network resilience, including promotion of collaboration and information sharing among operators and other stakeholders.<sup>43</sup>

In 2025, RTR once again contributed to the work of the OECD by submitting data on the Austrian telecommunications market. The revised OECD broadband statistics portal at <https://www.oecd.org/en/topics/sub-issues/broadband-statistics.html> now presents the data from OECD member states in a visually more appealing manner that also supports meaningful international comparisons.

### 6.13.4 RTR and ENISA

At EU level, RTR has chaired the European Competent Authorities for Trust Services (ECATS) Expert Group since 2018. ECATS serves as a cooperation platform for cybersecurity authorities and supervisory bodies overseeing trust services. In 2025, member activities focused on the integration of the expert group with the NIS Cooperation Group established under Art. 14 of the NIS 2 Directive, where it will now form a subgroup of the Digital Infrastructure and Services workstream. This moves the expert group inside the legislative framework for cybersecurity, where it can contribute even more effectively to the complementary interaction of the eIDAS Regulation and NIS 2. RTR was also active in the Forum of European Supervisory Authorities for Trust Service Providers (FESA) in 2025. Activities here focused primarily on issues related to the implementation of the revised eIDAS Regulation.

42 OECD (2025), "The environmental sustainability of communication networks", OECD Digital Economy Papers, No. 372, OECD, Paris Cedex 16, <https://doi.org/10.1787/d1cb2210-en>.

43 OECD (2025), "Enhancing the resilience of communication networks", OECD Digital Economy Papers, No. 374, OECD Publishing, Paris, <https://doi.org/10.1787/d6920477-en>.



# RTR and PCK activities in the postal sector

# 07 RTR and PCK activities in the postal sector

The Post-Control-Kommission (PCK) and the Austrian Regulatory Authority for Broadcasting and Telecommunications (RTR) are jointly responsible for safeguarding competition in the postal services market. In addition to providing operational support to the PCK, RTR has separate regulatory duties relating to the notification of services, conciliation and arbitration in end user disputes. We present in the following the most significant regulatory activities undertaken by the two authorities in 2025.

## 7.1 Procedures before the PCK

### 7.1.1 Closure and discontinuation of postal service points

When referring to closure or discontinuation, a distinction needs to be made between directly operated postal service points (PSPs) and PSPs operated by third parties.

Österreichische Post AG (Post AG) must directly report to the PCK any plans to close down a directly operated PSP, and may only proceed with closure once certain requirements set out in the Postal Market Act (PMG) have been met.

Post AG may also meet the obligation to provide universal service alternatively through other PSPs, such as PSPs currently operated by Post AG or a Post AG partner (a third-party-operated PSP). Where the preconditions for closure as set out in the PMG are not met, the PCK may conclude the procedure by prohibiting the closure of a directly operated PSP. The PCK may make authorisation of the closure contingent on another specified PSP providing replacement service. The PCK may also drop the procedure and allow closure to go ahead if the preconditions under the PMG have been met. More information on procedures relating to the closure of PSPs operated by Post AG can be found in communications reports for previous years. In the 2025 reporting year, Post AG notified the regulatory authority of the planned closure of a total of 36 directly operated PSPs. Eleven directly operated PSPs were closed in the 2025 reporting year.

In addition to monitoring the planned closure of directly operated PSPs, the PCK also conducts supervisory procedures to review any discontinuation of third-party-operated PSPs, for instance after insolvency of postal service partners or the termination of contracts.

Under the PMG, Post AG is also required in such closure cases to ensure the supply of universal service as well as coverage with PSPs throughout the country. Under certain conditions, alternative supply solutions, including the deployment of rural delivery personnel, can be implemented in such situations.

Procedures conducted by the PCK in 2025 involved closures of both third-party-operated PSPs and of directly operated PSPs. Such procedures were initiated in a total of 87 cases. All of these supervisory procedures were concluded without issuing a decision, since the provision of the universal service and blanket coverage with PSPs was ensured in each case.

Total PSPs in Austria rose during the reporting year, from 1679 (as of 31 December 2024) to 1,682 (as of 31 December 2025). Rural delivery personnel had been additionally deployed in 18 cases as an alternative service supply solution as of 31 December 2025.

**Table 58: Postal service points operated by Post AG and by third parties, 2021 to 2025**

	2021	2022	2023	2024	2025
Post AG-operated PSPs	395	379	361	358	347
Third-party-operated PSPs	1,351	1,341	1,337	1,321	1,335
<b>Total PSPs</b>	<b>1,746</b>	<b>1,720</b>	<b>1,698</b>	<b>1,679</b>	<b>1,682</b>

## 7.1.2 Payment orders for the financial contribution under Art. 34a KOG

To cover the cost of postal sector regulation, the provisions of the KommAustria Act (KOG) require the federal government to cover from its budget one portion of expenses and the postal service industry to contribute the remaining share.

Where postal service providers fail to meet their obligation to pay financial contributions, the PCK is obliged to issue an official decision ordering payment. In no case in 2025 was it necessary for the PCK to order payment of an outstanding financial contribution.

## 7.1.3 Licence issuing

A licence issued by the PCK is required in order to operate a business for conveying letters weighing 50 g or less. No new licences were issued in 2025. One company announced the intention to transfer their licence to another company.

This brought the number of licence holders to six by the end of 2025:

- feibra GmbH
- Medienvertrieb OÖ GmbH
- RS Zustellservice GmbH
- noebote GmbH
- hpc DUAL Österreich GmbH
- Wien IT GmbH

## 7.1.4 General terms of service and tariffs

The universal service provider (Post AG) is required to issue general terms and conditions governing the provision of universal services along with a list of associated tariffs to be charged. These general terms and conditions are then to be notified to the PCK. Within two months, the PCK may object to any notified general terms and conditions not conforming to specific provisions of law. Five procedures involving modifications of Post AG's general terms and conditions were conducted in the 2025 reporting year.

Other postal service providers offering services in the universal service sector are also required to issue and to notify to the PCK the applicable general terms and conditions. The review is carried out to the same standards as those that apply to the universal service provider, although the PCK does not verify the tariffs.

### 7.1.5 Tariff adjustments and design changes applying to Austrian Post letter products

In 2025, Austrian Post made numerous changes to products, prices and general terms and conditions; these were the subject of five procedures before the PCK.

As these changes were in line with statutory audit standards, the majority were accepted without any objections. The toll surcharge for trucks carrying parcels was increased while the fees for sending domestic parcels, international parcels and parcel stamps were adjusted in line with inflation. Rates were changed for other products, specifically international letters, forwarding orders, Info.Mail, newspaper delivery, Sponsoring, Mail and letters with advice of receipt. A number of free additional services, such as digital enhancements and tracking returns of Info.Mail items, have also been discontinued.

In future, parcel dimensions for international parcels will be aligned with national regulations. Parcel stamps from franking machines were renamed 'offline parcel stamps'.

In the case of international parcels where no value is declared, the original exemption from liability—from a parcel value of EUR 510—has been replaced by a limitation of liability. New additional services include complete preliminary customs clearance—payment of customs duties PDDP (Postal Delivered Duty Paid) in a third country)—when sending parcels to the USA.

For returns from outside the EU to Austria, Post AG is mandated to take over customs clearance against a fee. Registered mail as an additional service is no longer mandatory for international letters containing goods in the destination country; in future, this service will remain mandatory only for tracked items (corresponding to the product 'simple registered mail'). The option of delivering to pick-up boxes was included in the general terms and conditions for domestic parcels.

The terms governing absence from the delivery address were removed from the general terms and conditions for domestic letters. In future, these will only be available for the vacation hold mail product. Fees for the item enquiry service increased for the first time since 2003. Physical samples are no longer handed over when mailing via or Info.Mail and Sponsoring.Mail. The procedure has been replaced by a digital submission workflow that is verified using an AI-based solution.

From 1 September 2025 onwards, new EU legislation to ensure aviation security states that liquids, gases and gels must no longer be transported in one shipment together with battery-operated devices; this was taken into the relevant general terms and conditions.

In a decision (PG 1/25-19) dated 23 June 2025, the PCK objected to all of the clauses of the general terms and conditions for parcel stamps which, being the subject of complaints, intended to phase out parcel stamps from franking machines.

Offering parcel stamps purely online was seen as contradicting the non-discrimination principle. Doing so would disadvantage those persons without online access or those who are unable to print out parcel stamps at home.

### 7.1.6 Proceedings before the Federal Administrative Court

In 2025, no appeals were submitted against any decisions issued by the PCK.

## 7.2 Procedures before RTR

### 7.2.1 Notification of provision of postal services

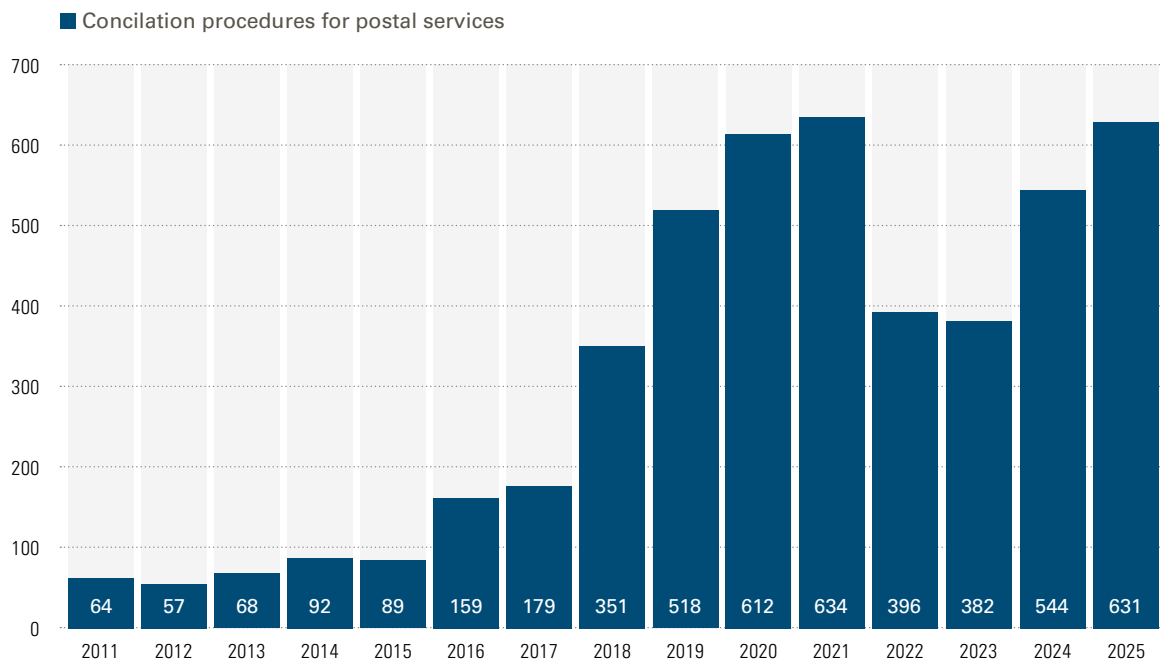
Postal service providers are required to notify RTR in advance of the intended provision of a postal service as well as any change to or discontinuation of such a service. RTR is required to publish on the internet a list of notified postal services, including the name of the postal service provider in each case. In 2025, 13 business entities notified to RTR the provision of postal services. As a result, the list of postal service providers maintained by RTR comprised a total of 134 businesses as of the end of 2025.

### 7.2.2 Review of Post AG's cost accounting system

The regulatory authority's remits include periodically reviewing the cost accounting system used by universal service provider Post AG. The universal service provider is required to maintain separate accounts in its internal cost accounting systems for services classified as universal services and for those not classified as universal services. The internal cost accounting systems must be based on uniformly applied and objectively justifiable principles of cost accounting. As in previous years, the review carried out in the reporting year revealed that the cost accounting system used in 2024 complied with the specified criteria.

## 7.3 Conciliation procedures in postal services

With 631 conciliation procedures in total, 2025 fell only just short of the record values reached in 2021. This figure may initially appear low in view of the millions of letters and parcels that are sent each year. Nevertheless, it indicates increasingly growing issues within the postal sector. The Postal Market Act (PMG) states that conciliation procedures may only be requested by senders. The majority of postal complaints received by RTR in the reporting year were submitted by recipients and, consequently, could not be categorised as conciliation procedures. For further details, see [section 7.4](#).

**Figure 38: Conciliation procedures for postal services, 2011–2025**

The conciliation procedures pertaining to all postal service providers in Austria largely stemmed from delivery problems.

Published on the RTR website, the annual report of the conciliation body presents in detail the conciliation activities undertaken.

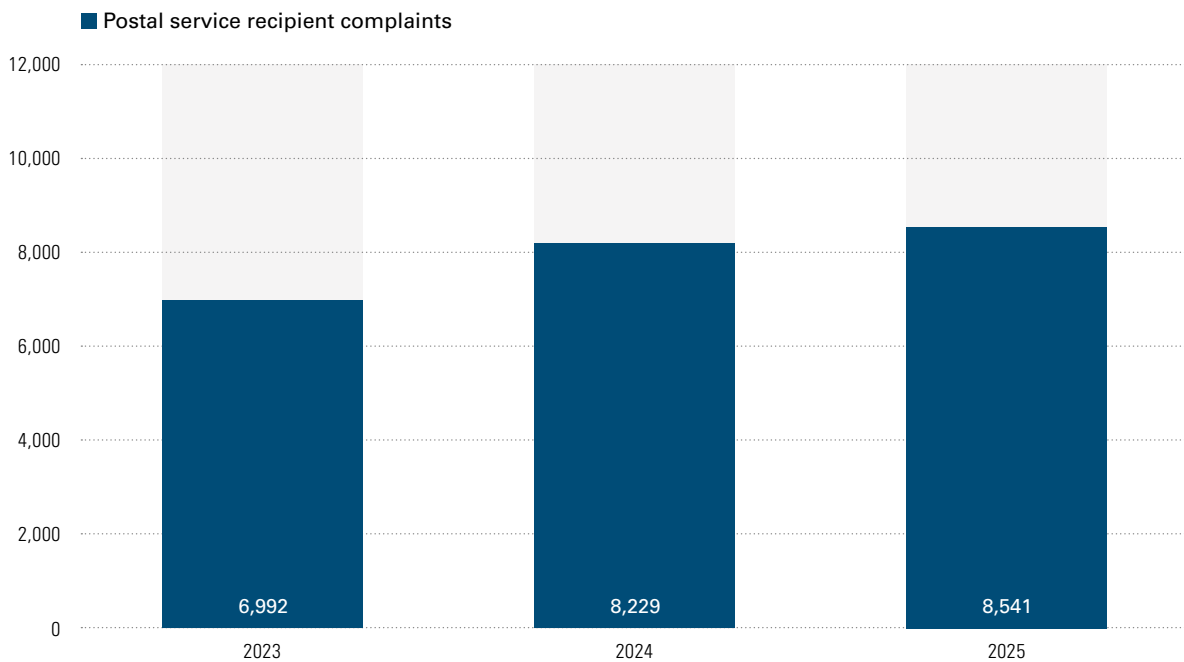
## 7.4 Portal for postal service recipient complaints

The option of requesting a conciliation procedure is available only to parties contracting to a postal service contract—in other words, the sender. This means that very few rights or redress mechanisms are afforded to recipients. While it would not make sense to resort to a conciliation procedure for each and every case arising from an issue with postal delivery, it must still be possible to address and eliminate fundamental problems within the delivery system.

The portal that was set up on the RTR website for postal service recipient complaints puts recipients of postal items in a stronger position. It also enables trends in complaints to be observed continuously across the various postal service providers. If a pattern of irregularities is identified, supervisory measures can be taken against postal service providers. An additional advantage of such monitoring is that the postal service providers concerned can be approached informally in the event of any recognised problems. Anonymous reports are sent to relevant postal service providers on a regular basis. This gives them the opportunity to identify and focus on as well as accordingly resolve any problems. However, as has been stated previously, there is no option, nor would it be feasible, to process each individual complaint submitted, i.e. an option comparable to a conciliation procedure, which is available only to senders of postal items.

As the data show, intensive use is being made of the portal and a steady upward trend can be seen in the number of complaints submitted.

**Figure 39: Postal service recipient complaints 2023–2025**



## 7.5 International activities: RTR and the ERGP

The European Regulators Group for Postal Services (ERGP), set up based on an EU Commission resolution passed on 10 August 2010, became operational in 2011. The ERGP is a body that provides technical support and advice to the European Commission on issues relating to postal service regulation within the EU. The group thus plays a key role in consultation, coordination and cooperation between Member States and the European Commission.

An ERGP working group meeting took place on RTR’s premises in mid-February. RTR hosted and organised a meeting of the ERGP Sustainability Working Group. In 2025, this group examined how new technologies—including artificial intelligence—are being used in the postal service and their impact on environmental sustainability. This meeting was attended by representatives of 13 European regulatory authorities.

On 21 May, the European Commission presented its [new Single Market Strategy](#)<sup>44</sup>, which aims to increase the competitiveness of European companies. The Single Market Strategy focuses on several key priorities. Explicitly mentioned was the planned and long-awaited proposal for an EU Delivery Act. This aims to modernise the regulations within the postal and parcel sector and pave the way to full realisation of the Single Market.

The twenty-eighth plenary meeting of the ERGP was headed by Dan Sjöblom, General Director of the Swedish Post and Telecommunications Authorities (PTS) on 1 and 2 July 2025 in Istanbul. During the meeting, the draft medium-term strategy for 2026–2028 as well as the work programme for 2026 were discussed, approved and released for public consultation. The report on the fundamental elements of the future legal framework for the [postal sector](#)<sup>45</sup> and the report on value chains and business models in the [delivery ecosystem](#)<sup>46</sup> were also approved.

44 European Commission (21 May 2025), “The Single Market: our European home market in an uncertain world”, [https://single-market-economy.ec.europa.eu/publications/single-market-our-european-home-market-uncertain-world\\_en](https://single-market-economy.ec.europa.eu/publications/single-market-our-european-home-market-uncertain-world_en)

45 ERGP (2 July 2025), “ERGP report on the outline of the future regulatory postal framework”, <https://webgate.ec.europa.eu/circabc-ewpp/d/d/workspace/SpacesStore/f1d8ad07-415d-429f-9673-0cb8e41dc806/download>

46 ERGP (10 July 2025), “ERGP report on postal prices for the postal market”, <https://webgate.ec.europa.eu/circabc-ewpp/d/d/workspace/SpacesStore/210be34b-cb4e-4154-b7eb-92e8417d6ebf/download>

Ahead of the plenary meeting, on 1 July, the ERGP held a public workshop discussing “The postal sector in the digital age: innovation and regulation”. The workshop examined the effects of digitisation, artificial intelligence and automation on postal services. It also looks at opportunities for innovation and challenges that are specific to certain sectors.

Around 150 representatives from European institutions, NRAs, the postal and delivery sector, E-Commerce platforms and consumer organisations met in Brussels on 14 October 2025 for the sixth ERGP stakeholder forum. This forum discussed in depth current and future challenges faced by the postal sector, as well as initial feedback on the “[Call for Evidence](#)”<sup>47</sup> for the potential future EU Delivery Act.

The twenty-ninth plenary meeting of the ERGP took place in Tromsø (Norway) on 26 and 27 November, starting with an internal workshop to discuss key issues relating to the future regulatory framework; it also discussed the requirements for universal service. These discussions are used in the work of the European Commission for the EU Delivery Act and are also incorporated into the ERGP report on the minimum requirements for universal service. In 2026, the ERGP reaffirmed its commitment to actively supporting the Commission in this important project.

The ERGP work programme for 2026 and the ERGP medium-term strategy for 2026–2028 were approved during the plenary meeting. The two documents set out the tasks awaiting the ERGP over the next few years.

The plenary assembly adopted the following reports from the ongoing 2025 work programme ([https://single-market-economy.ec.europa.eu/sectors/postal-services/european-regulators-group-postal-services\\_en](https://single-market-economy.ec.europa.eu/sectors/postal-services/european-regulators-group-postal-services_en)):

- ERGP PL II (25) 20 ERGP work programme for 2026
- ERGP PL II (25) 14 ERGP medium-term strategy 2026–2028
- ERGP PL II (25) 9 ERGP report on core indicators for postal services
- ERGP PL II (25) 10 Report on service quality, consumer protection and complaint handling
- ERGP PL II (25) 3 Report on the financing of universal service
- ERGP PL II (25) 26 Report on service standards

The ERGP also adopted several internal documents to support working practices, efficiency and organisation in the coming years.

### **Elections for the ERGP chair in 2027 and 2028**

Due to staff changes within the existing troika, voting took place to elect the chairperson for 2027 as well as for 2028, thereby ensuring the continuity and stability of the management body. The plenary assembly unanimously voted in Bernardo Herman, member of the board of the Belgian Institute for Postal Services and Telecommunications (BIPT/IBPT), to chair the ERGP in 2027.

The managing director of RTR’s Telecommunications and Postal Services Division was elected to chair the ERGP in 2028. This means that in 2028, for the first time since its foundation, the committee will be headed by an Austrian representative.

47 European Commission, “New EU Delivery Act – EU to reform postal rules”, [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14821-New-EU-Delivery-Act-EU-to-reform-postal-rules\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14821-New-EU-Delivery-Act-EU-to-reform-postal-rules_en)





# Service Desk for Artificial Intelligence

# 08 Service Desk for Artificial Intelligence

The Service Desk for Artificial Intelligence (AI Service Desk) serves the general public as a point of contact and source of information on the topic of artificial intelligence (AI), while also assisting with the implementation of the EU's AI Act. The department was set up within RTR in early 2024, concomitantly with Art. 20c of the KommAustria Act (KOG) and Art. 194a of the Telecommunications Act (TKG) (FLG. I No. 6/2024).

The department's broad portfolio consists of services including:

- Website
- Social media
- AI newsletter
- Events
- Studies
- Publications
- Advice via email
- Support hotline
- Chatbot

## 8.1 Website

The website, always kept up to date, can be accessed at [ai.rtr.at](https://ai.rtr.at) (English version) and [ki.rtr.at](https://ki.rtr.at) (German version). Here information is available concerning the AI Act, external projects and initiatives, international organisations related to AI, recent news as well as numerous links for added detail.

The centrepiece of the content-rich website are the pages on the AI Act. The key topics of the act are introduced here, including details in chart form. This information is supplemented with a time frame for the Act and an FAQ.

The topics and infographics presented on the website focus on:

- Actors
- Background to the AI Act
- Provider obligations
- Authorities and bodies
- Deployer obligations
- FAQ
- Risk levels of AI models
- Risk levels of AI systems
- Sanctions
- Transparency obligation
- Time frame

All infographics (in English and German) can be downloaded from [https://www.rtr.at/rtr/service/ki-servicestelle/Overview\\_AI-Act.pdf](https://www.rtr.at/rtr/service/ki-servicestelle/Overview_AI-Act.pdf).

Figure 40: German-language infographics on the AI Act



Figure 41: English-language infographics on the AI Act



The FAQ published on the website is mostly derived from questions submitted to the Service Desk by businesses, private citizens and other stakeholders. Knowledge is in this way made available to a wider public.

## 8.2 Social Media

The infographics were shared on X (formerly Twitter) and LinkedIn, with a wide response. All AI Service Desk information, including the infographics, is published under a CC BY 4.0 licence.

The social media presence is supplemented by FAQs, with question/answer pairs posted regularly on LinkedIn. The LinkedIn profile is also used to announce events and the newsletter.

Figure 42: FAQ topics for sharing on social media



## 8.3 AI newsletter

The AI newsletter provides regular summaries of the information offered by the AI Service Desk as well as website links to the portfolio of information and events. A user-friendly newsletter subscription button is provided at the bottom of the AI Service Desk home page on [ki.rtr.at](https://ki.rtr.at).

## 8.4 Events

The regular events hosted by the AI Service Desk feature distinguished guest speakers, and have proven to be very popular and well-attended. This section of the report summarises the events organised by the AI Service Desk in 2025.

### 8.4.1 Cybersecurity in the age of artificial intelligence

In January 2025, the AI Service Desk hosted the event 'Cybersecurity in the age of artificial intelligence' at RTR's Vienna headquarters. The event focused on the challenges cybersecurity teams now face as a result of recent developments in AI systems.

In the first session, Rudolf Mayer and Andreas Ekelhart from SBA Research presented an overview of the study "Artificial intelligence in cybersecurity—opportunities and risks", which was commissioned by RTR ([see chapter 8.5.1](#)). The study authors strongly recommended developing innovative solutions and implementing robust data strategies, so as to fully exploit potential AI applications in cybersecurity while managing the associated risks. This was followed by a presentation from Gerald DiBauer (A-SIT), highlighting the risks and opportunities arising from the use of AI tools in a cybersecurity context. Corina Pascu (ENISA) concluded the

first session with an EU perspective on AI and cybersecurity, emphasising AI as a strategic priority. Andrew Lindley (AIT) and Julia Krickl (ÖIAT) opened the second session with a presentation on the 'Fake Shop Detector', which aims to make online shopping safer.

The second session concluded with an expert panel to discuss recent efforts towards strengthening cybersecurity through artificial intelligence. With Walter Peissl chairing, Rudolf Mayer and Gerald Dißauer were joined by Joe Pichlmayer (IKARUS) to talk about the associated issues of AI and security in the digital domain. The panellists also discussed the question of European digital sovereignty, with Europe's deep dependence on US-based services (cloud, software, etc.) identified as a latent risk needing to be addressed urgently. The experts stressed the need for coordinated efforts at European level, while agreeing that unfortunately very little evidence of such has been seen to date.

Materials from the event are available (in German) from the RTR website at [https://www.rtr.at/TKP/aktuelles/veranstaltungen/veranstaltungen/veranstaltungen\\_2024/ki\\_u\\_cybersecurity/ki\\_und\\_cybersecurity.de.html#pastevents](https://www.rtr.at/TKP/aktuelles/veranstaltungen/veranstaltungen/veranstaltungen_2024/ki_u_cybersecurity/ki_und_cybersecurity.de.html#pastevents).

## 8.4.2 AI in personnel management and employment

In April 2025, RTR's AI Service Desk and the Vienna Chamber of Labour hosted a high-profile event on the topic of "AI in personnel management and employment". This event focused on the wide-ranging use cases and challenges presented by artificial intelligence in human resources management, as well as the digital transition in the Austrian labour market.

Thomas Schreiber and Robert Kiraly (RTR Telecommunications and Postal Services Division) presented the results of a representative survey of Austrian businesses on the use of AI in human resources, in light of the European Union's recent AI Act (see [chapter 8.5.2](#)). Titus Udrea (Vienna Chamber of Labour) presented some emerging issues for AI and the digital workplace as part of the Chamber's monitoring work, and explored the impact of algorithmic management, automation in production, and the deployment of AI within knowledge work and public administration.

Wolfie Christl (Cracked Labs) offered insights into data practices and technologies in the context of algorithmic management, while highlighting potential power and information imbalances in the workplace.

The presentation by David Walker and Florian Holzinger (Joanneum Research) outlined key dimensions of an observatory for the Austrian labour market, with the aim of systematically monitoring AI impact.

Johannes Warter (University of Salzburg) then detailed the EU's AI Act and related implications for employment and HR. Madeleine Müller (Research Institute) then addressed the "right to explanation", transparency and information rights in the context of artificial intelligence and employment, while also citing the relevant provisions of the AI Act and the GDPR.

The event closed with a panel discussion between Eva Angerler (Union of Private Sector Employees, Printing, Journalism, and Paper, GPA-djp), Florian Schäfer (Austrian Federal Economic Chamber), Rania Wazir (leiwand.ai) and Sabine Köszegi (Vienna University of Technology, AI Advisory Board), chaired by Walter Peissl.

Materials from the event are available (in German) from the RTR website at [https://www.rtr.at/TKP/aktuelles/veranstaltungen/veranstaltungen/veranstaltungen\\_2025/ki-im-personalmanagement/ki-und-personalmanagement.de.html#pastevents](https://www.rtr.at/TKP/aktuelles/veranstaltungen/veranstaltungen/veranstaltungen_2025/ki-im-personalmanagement/ki-und-personalmanagement.de.html#pastevents).

### 8.4.3 Artificial Intelligence in the Media Industry in 2025

On 14 October 2025, the AI Service Desk presented the results of the studies “Artificial intelligence in the media industry: 2025 AI Monitor” and “AI and media trust”. These studies are the most recent publications in the “Artificial Intelligence in the Media Industry” series launched in 2024.

The first part of the event focused on key findings from the two studies, presented by study authors Prof. Jan Krone and Prof. Michael Litschka (University of Applied Sciences St. Pölten), and Prof. Robert Pinzolit (University of Applied Sciences Burgenland).

The studies analyse the data obtained from interviews held with a total of 1,539 Austrians aged between 17 and 75. The authors conclude that to date the media have clearly failed to convince the majority of the public of the potential for AI’s responsible and meaningful use. The authors do note that media usage is fairly well-balanced, however, with a focus on traditional media. Around one third of respondents are also supportive of AI and see benefits in using these tools.

Afterwards, the significance and implications of the findings were discussed by: Sebastian Krause (Head of Digital, Kleine Zeitung), Prof. Michael Roither (University of Applied Sciences Burgenland), Katharina Schell (Deputy Editor-in-Chief, Austrian Press Agency, APA) and Anna Thalhammer (Editor-in-Chief, Profil).

### 8.4.4 AI in local administration

On 15 December 2025, RTR’s AI Service Desk hosted an event highlighting AI in local administration, attended by experts and practitioners in public administration, policymaking, law and technology. The event aimed to showcase the role of artificial intelligence in local government in Austria, while providing a forum for discussing innovative projects, challenges and the legal environment.

In the first session, “Practical insights from AI in local government”, Ronald Sallmann (Chief Digital Officer, Austrian Association of Cities and Towns, Managing Director, IT-Kommunal) gave an overview of new AI-supported approaches to streamlining administrative processes as well as the support services offered by the association. Joe Zehetner (Innovation in Politics) then presented some best practices and flagship projects from Austria’s towns and cities. Patrick Lieben-Seutter (Office Management, Municipality of Wiener Neudorf) and Lucas Sobotka (Managing Director, Kommunalnet E-Government Solutions) then illustrated how AI is applied to administrative practice, with reference to the ‘Digital Community Assistants’ now used in Wiener Neudorf.

The event closed with a panel discussion chaired by Walter Peissl (AI Advisory Board). Leading experts Maria-Stephanie Banke (WienIT), Alexandra Ciarnau (DORDA Rechtsanwälte, ailex) and Johannes Pressl (President, Austrian Association of Municipalities) addressed the opportunities and challenges presented by AI in public administration as well as key questions for regulatory policy.

While the panellists agreed that AI is now part of the daily routine in Austrian local government, as key conditions for its continued, long-term usage, they called for legal clarity, data sovereignty and the involvement of experts and citizens alongside technical innovation.

Materials from the event are available (in German) from the RTR website at [https://www.rtr.at/TKP/aktuelles/veranstaltungen/veranstaltungen/veranstaltungen\\_2025/ki-in-kommunalverwaltung/ki-in-der-kommunalverwaltung.de.html#pastevents](https://www.rtr.at/TKP/aktuelles/veranstaltungen/veranstaltungen/veranstaltungen_2025/ki-in-kommunalverwaltung/ki-in-der-kommunalverwaltung.de.html#pastevents).

## 8.5 Studies

During the reporting year, RTR and the AI Service Desk published several studies commissioned on the subject of AI. These studies are described below.

### 8.5.1 Cybersecurity and artificial intelligence: potential and challenges

RTR commissioned SBA Research with the study “Artificial intelligence in cybersecurity—opportunities and risks”. It provides a comprehensive overview of the current state of cybersecurity technology, and highlights both the opportunities and the challenges that result from the use of advanced AI systems and generative AI in the area of cybersecurity. The study is available (in German) on the RTR website at [https://www.rtr.at/TKP/aktuelles/publikationen/publikationen/messenger\\_functionalities.en.html](https://www.rtr.at/TKP/aktuelles/publikationen/publikationen/messenger_functionalities.en.html).

The study underscores how AI has become an indispensable tool in contemporary cybersecurity practice. By applying pattern recognition analysis to large volumes of data, AI is capable of detecting anomalies and therefore warning of potential cyberattacks. Large language models (LLMs) also support some particularly promising applications in the field of security risk assessment and vulnerability analysis.

Conversely, the study also highlights the numerous risks associated with the use of AI. Examples include errors in programming or in training data, which can result in vulnerabilities, as well as cyberattacks explicitly targeting AI systems.

The study also points out the need to develop innovative solutions and implement robust data strategies, so as to fully exploit the potential of AI in the area of cybersecurity while managing the associated risks. To maximise the benefits of AI while strengthening cybersecurity into the long term, a balanced approach is essential, one capable of integrating technological advances while complying with strict security requirements.

The costs incurred by RTR for the preparation of the “Artificial intelligence in cybersecurity” study totalled EUR 15,000 (net) and are reported pursuant to Art. 20 Par. 5 of the Federal Constitutional Act (Bundes-Verfassungsgesetz, B-VG).

### 8.5.2 Artificial intelligence in human resource management

The Service Desk for Artificial Intelligence conducted a representative survey on the use of artificial intelligence in human resource management and its implications in the context of the EU’s AI Act. The report offers insights into the deployment of AI for process optimisation (e.g. candidate screening) within personnel management and human resources. It also examines accompanying measures already being implemented before the entry into force of most of the obligations from the Act, as well as barriers identified in practice.

The report supplements the results of the company survey with guest articles offering perspectives from employers’ and workers’ organisations, business and research.

The overall analysis, together with the raw data, the data documentation and the survey questionnaire, can be found on the RTR website at <https://www.rtr.at/TKP/aktuelles/publikationen/publikationen/ai-in-hr-management.en.html>. The data are provided as Open Data and can be used under the Creative Commons BY 4.0 licence.

The costs incurred by RTR in conducting the phone-based company survey totalled EUR 17,720 (net) and are reported pursuant to Art. 20 Par. 5 B-VG.

### 8.5.3 Study on Artificial Intelligence in the Media Industry: 2025 AI Monitor

The 2025 AI Monitor continues the study “AI in the media industry” commissioned by RTR in 2024. The study provides an in-depth analysis of recent developments in various industries in the DACH region while highlighting technological advances at international level.

Taking the integration of AI applications within the media industry as its main point of focus, the study notes that the technical barriers to implementation continue to fall, while AI language models and agents are now increasingly user-friendly. These developments are accelerating adoption of this technology, with aspects such as usability and security being the main drivers.

The report shows how AI has become a force that is reshaping the media industry: with new intermediaries entering at various levels, artificial intelligence is having a visible impact along the entire value chain. Despite the dynamic nature of product lifecycles, the first signs of structural consolidation are already apparent, especially as regards the market power of large language models and access to computing resources.

The study “AI in the media industry—2025 AI Monitor” was commissioned by RTR’s Media Division and prepared by the Media Business research group at the University of Applied Sciences St. Pölten, led by Prof. Jan Krone and co-author Andrea Dzugasova. The study evaluated the issues and arguments presented in more than 500 editorial articles, press releases and essays on AI-related topics, as well as the results of industry studies.

The costs incurred by RTR for the preparation of the “AI in the media industry” study, totalling EUR 17,919 (net), are reported pursuant to Art. 20 Par. 5 B-VG.

### 8.5.4 “AI and media trust” study

Alongside the “2025 AI Monitor” published in June 2025, the “AI and media trust” study commissioned by RTR’s Media Division continues the series of publications in the “Artificial Intelligence in the Media Industry” series launched in 2024. The “AI and media trust” study investigates the complex interplay between artificial intelligence, media trust and satisfaction with democracy in Austria. The study also examines the interactions between AI and social media platforms.

On the basis of a representative survey followed by a secondary analysis, the study reveals how divided public perception is between the risks and opportunities artificial intelligence offers in the media sector.

The general public is clearly sceptical about the use of AI in news media and wants to see the introduction of a dedicated labelling scheme as well as regular checks by a human reviewer. Only a minority of respondents saw opportunities or benefits in the form of more efficient fact-checking or new presentation formats.

The study “AI in the media industry—2025 AI Monitor” was commissioned by the RTR’s Media Division and prepared by a joint research team led by Prof. Michael Litschka of the University of Applied Sciences St. Pölten in cooperation with Prof. Michael Roither of the University of Applied Sciences Burgenland.

The overall costs incurred by RTR for the preparation of the two “AI in the media industry” and “2025 AI Monitor” studies totalled EUR 46,872 (net) and are reported pursuant to Art. 20 Par. 5 B-VG.

## 8.6 Chatbot

During the reporting year, the AI Service Desk launched its own chatbot for handling enquiries about the AI Act. The chatbot is hosted at <https://chat.ki.rtr.at> and its codebase has also been open-sourced. In addition to the chatbot, RTR has also published full technical as well as full legal documentation:

- <https://www.rtr.at/rtr/service/ki-servicestelle/chat/technical-documentation.en.html>: technical documentation
- <https://www.rtr.at/rtr/service/ki-servicestelle/chat/recht.de.html>: legal documentation
- <https://github.com/rtr-ai/aia-rag>: complete client and server codebase

A chatbot prototype was first presented to industry delegates at the 2025 International Symposium for Law and IT in Vienna. The chatbot has also received acclaim outside Austria. In Paris, for example, it was presented to an international audience as part of a UNESCO event.

Transparency is an important point of focus for the chatbot. All of processing steps (its 'thinking') are shown and explained in detail, and the bot even outputs its own electricity consumption along with its answer.

**Figure 43: Details of the energy consumed by the AI Act Chatbot (in German)**

**Energieverbrauch:** Diese Fragenbeantwortung hat einen Stromverbrauch von **0,001417 kWh** verursacht. Mit dieser Energiemenge kann etwa ein *Haarföhn* für *2,32 Sekunden* betrieben, oder ein *Handy* um *4,53 %* aufgeladen werden.

Detaillierte Infos zum Energieverbrauch					
Energieverbrauch	Prozessor (CPU)	Grafikkarte (GPU)	Arbeitsspeicher (RAM)	Gesamt	Dauer
Indexierung von relevanten Daten (einmalig pro Serverstart)	0,000175 kWh	0,000172 kWh	0,000007 kWh	0,000354 kWh	11,38 Sek.
Erstellung des Prompts („Retrieve“ und „Augment“)	0,000019 kWh	0,000006 kWh	0,000001 kWh	0,000026 kWh	1,06 Sek.
Generierung der Antwort („Generate“)	0,000644 kWh	0,000715 kWh	0,000032 kWh	0,001391 kWh	40,32 Sek.
<b>Gesamt</b>	<b>0,000839 kWh</b>	<b>0,000893 kWh</b>	<b>0,000039 kWh</b>	<b>0,001771 kWh</b>	<b>52,77 Sek.</b>

Der Stromverbrauch wurde direkt auf Hardware-Ebene gemessen, die angegebenen Zahlen entsprechen den dort vorliegenden Daten. Der PUE-Wert beträgt zwischen 1,10 und 1,16. Seitens des Rechenzentrums wird ein ausschließlich auf erneuerbare Energien abgestellter Strommix verwendet. Der durchschnittliche CO<sub>2</sub>-Ausstoß im Hosting-Land Deutschland lag zuletzt bei rund 425g CO<sub>2</sub> pro kWh.

## 8.7 Advice via email

Questions for the AI Service Desk team can be sent to [ki@rtr.at](mailto:ki@rtr.at), which has already received a substantial number of enquiries. After obtaining the consent of the enquiring party, the question-and-answer pairs are published at [ai.rtr.at/faq](https://ai.rtr.at/faq) and also shared on LinkedIn. Most of these FAQ entries and LinkedIn posts involve repeat questions on similar topics.

## 8.8 Personal consultations

AI Service Desk staff responded to numerous requests for face-to-face meetings in 2025. Apart from providing individual advice, these were also used to present the work of the Service Desk, including its current and planned activities. Acknowledging its responsibility to provide advice and assistance in the field of artificial intelligence, the Service Desk also used such consulting opportunities to fulfil this duty to the benefit of a large number of domestic and international companies, public bodies and foreign diplomatic missions. The same approach was taken to phone or email enquiries placed to the Service Desk by the public, with more than 200 emails being received during the 2025 calendar year.

## 8.9 Supporting the AI Advisory Board

The AI Service Desk also provides support to the AI Advisory Board. During the 2025 calendar year, the advisory board was convened for four regular sessions. Minutes of these meetings were taken by the AI Service Desk. RTR was also responsible for providing the physical conference facilities, including the technical infrastructure.

## 8.10 Participation in events

Apart from organising its own events, the AI Service Desk also sent delegates to numerous external events, in order to present the activities of the AI Service Desk and/or to participate actively as guest speakers. Noteworthy examples of such activities during the reporting period include the AI Service Desk stand organised for the Technology Impact Summit in Graz or the talk on the AI Act given by a speaker from the AI Service Desk at the Austrian Federal Economic Chamber's EDAY event.





# Information services for the general public

# 09 Information services for the general public

## 9.1 RTR's activities as a competence centre

RTR is tasked with serving as a competence centre for broadcasting and telecommunications industry<sup>48</sup> affairs, thereby complying with the principles of economy, efficiency and expediency.

This competence centre role involves analysing issues relating to the activities of KommAustria, the TKK and RTR. Examples here include commissioning study reports, preparing expert reviews and organising professional events. The findings from such evaluations are to be appropriately prepared for public disclosure.

The following section presents activities performed in the competence centre role (cf. Art. 20 KommAustria Act, KOG) as well as activities pursuant to Art. 17 Par. 2 and Par. 3 KOG, and Art. 186 TKG 2021.

### 9.1.1 Activities within the Media Division

#### 9.1.1.1 Studies and publications

##### 9.1.1.1.1 100 years of radio in Austria

This publication provides a retrospective of the milestones achieved in a century of Austrian radio history while also offering an overview of the current state of play for radio in Austria. Cartographic material from KommAustria and RTR's Media Division is deployed to show which commercial radio stations can be received and where in Austria, based on the 135 currently valid station licences issued by KommAustria as of 2025. These visualisations also depict the broadcasting areas for the publicly funded radio stations operated by the ORF. The publication can be accessed (in German) from the RTR website at [https://www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen\\_2025/Publikation\\_100\\_Jahre\\_Hoerfunk.de.html](https://www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen_2025/Publikation_100_Jahre_Hoerfunk.de.html).

The costs incurred by RTR for the preparation of the publication "100 years of radio in Austria", totalling EUR 14,850.00 (net), are reported pursuant to Art. 20 Par. 5 of the Federal Constitutional Act (B-VG).

##### 9.1.1.1.2 Protection of freedom of expression in the Digital Services Act (DSA)

The "Freedom of expression in the DSA" study is the first of a series of publications on the Digital Services Act. The series of publications aims to support the practical application of the act while also fostering public debate on freedom of expression and democratic discussion in the digital space. In this way, the Media Division is fulfilling its legal obligation as a competence centre to conduct analyses and studies in the context of the tasks and objectives of the KommAustria media authority.

This wide-ranging study underlines how the debate on freedom of expression in digital spaces is strongly influenced by the standards for discourse in the analogue domain. With the visibility of opinions presented in digital media significantly higher, the stronger impact means greater responsibility for the moderation of such spaces as well as the many options offered by technology. One key development here is the European Union's decision not to leave it up to platform operators to determine which statements are protected by freedom of expression and which are to be considered illegal. Instead, the DSA ensures such questions are answered within democratic frameworks.

The report is published (in German) on the RTR website at [www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen\\_2025/MeinungsfreiheitDSA.de.html](http://www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen_2025/MeinungsfreiheitDSA.de.html).

<sup>48</sup> RTR does not act as a competence centre for postal service regulation.

The costs incurred by RTR for the preparation of the “Freedom of expression in the DSA” study, totalling EUR 15,600 (net), are reported pursuant to Art. 20 Par. 5 B-VG.

#### 9.1.1.1.3 2024 digital skills Austria

The third edition of the “Digital skills Austria” study, covering 2024, examines developments in the skillsets exhibited by Austrian citizens in navigating and finding their way around the digital realm and, in particular, in helping to shape it. The study, originally commissioned from a team headed by Prof. Thomas Steinmaurer (Paris Lodron University of Salzburg) in 2022, was subsequently expanded in 2023.

In 2024, the study team once again asked Austrians to complete an online questionnaire and provide a self-assessment of their digital skills. Findings obtained over the three-year period have revealed a largely constant pattern of results for each study year.

In 2024, the survey included for the first time questions about respondents’ knowledge of AI tools. In detail, study participants were presented with a list of applications and were asked to identify only those applications that make use of AI. Respondents were also asked to provide their personal opinions on the use of AI.

The study is available to be downloaded from the RTR website at [www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen\\_2025/Digital\\_Skills\\_Austria\\_2024.de.html](http://www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen_2025/Digital_Skills_Austria_2024.de.html) (in German).

The costs incurred by RTR for the preparation of the “2024 digital skills Austria” study, totalling EUR 48,514 (net), are reported pursuant to Art. 20 Par. 5 B-VG.

#### 9.1.1.1.4 2025 DAB+ digital radio Austria

The “DAB+ digital radio Austria” study presents awareness and reach of digital radio services within the country. In 2025, this study was conducted for the third year running by Ipsos Market Research on behalf of the Media Division, involving a representative sample of the population (2,900 people). The study assesses the awareness and reach of DAB+ digital radio, which was first launched in Vienna in 2018 and expanded nationwide from 2019 onwards.

In summer 2024, a further 29 DAB+ digital radio stations were launched, essentially doubling the overall number of DAB+ services in Austria to 60 stations. Interestingly, the 2025 study also shows that, of those DAB+ users who have already listened to the new broadcasters, four out of five (79%) consider the larger number of services to be a ‘Good’ or ‘Very good’ addition.

The report is published (in German) on the RTR website at [www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen\\_2025/DAB-Studie\\_2025.de.html](http://www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen_2025/DAB-Studie_2025.de.html).

The costs incurred by RTR for the preparation of the study “2025 DAB+ digital radio Austria, awareness and reach measurement”, totalling EUR 26,700.00 (net), are reported pursuant to Art. 20 Par. 5 B-VG.

#### 9.1.1.1.5 2025 Video Survey

The Video Survey by the Media Division and the Teletest Working Group has been published each year since 2016. This survey describes how each and every video product is used, from linear television and broadcaster media libraries to alternative online services and the use of video in social media. Data are presented in the form of tables and charts, and free of interpretations.

Market research institute GfK Austria carried out a representative survey on behalf of the Media Division and the Teletest Working Group, completing over 4,000 computer-assisted web interviews (CAWI) to investigate how people in Austria aged 14 and up consume video. The survey is traditionally held in February of each year.

Now in its tenth edition, the study reveals only slight changes when compared with the results of the previous year. Video was used by 99% of the Austrian population at least once a week and by 74% on a daily basis; this figure rises to 100% for the 14 to 29-year-old age group. People in Austria spend 225 minutes (3.75 hours) consuming video content on a daily basis—a year-on-year rise of two minutes. Both the frequency and duration of video consumption have stabilised in post-pandemic Austria. Broadcasters have managed to use media libraries and non-live television to largely compensate for waning linear consumption. A modest trend towards on-demand television viewing continues to be seen.

The study is available in its entirety (in German) on the RTR website at [www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen\\_2025/Bewegtstudie2025.de.html](http://www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen_2025/Bewegtstudie2025.de.html).

#### 9.1.1.1.6 Study on artificial intelligence in the media industry—2025 AI Monitor

The study “Artificial intelligence in the media industry—2025 AI Monitor” is presented in detail in [section 8.5.3](#).

#### 9.1.1.1.7 2025 Online Audio Monitor Austria

The Online Audio Monitor Austria (OAMA) is published by the Media Division as an annual study on the usage and reach of online audio services in Austria. The Media Division thereby fulfils its legal obligation as a competence centre to conduct analyses and studies in the context of the tasks and objectives of the KommAustria media authority.

The Media Division commissions Online Audio Monitor Austria from Ipsos. To produce the report, the market research institute conducts an annual online survey of 4,000 people aged 15 and over, around mid-year. This group of people is representative of 95% of Austrians with internet access (Statistics Austria 2024).

The report includes diagrams and tables illustrating the use of audio media on the internet by the Austrian online population. Insights provided by the study cover the usage type and frequency of online audio services, preferred content and platforms, the devices used to access the content, as well as usage scenarios, reasons for use and times of use for the many online services available. The study also addresses the wide-ranging topic of radio programme recordings and podcasts.

The costs incurred by RTR for the preparation of the 2025 Online Audio Monitor Austria, totalling EUR 32,500.00 (net), are reported pursuant to Art. 20 Par. 5 B-VG.

The 2025 Online Audio Monitor Austria can be accessed (in German) from the RTR website at [www.rtr.at/medien/aktuelles/publikationen/Publikationen/nin/Not\\_NewsCenter\\_Publikationen\\_2025/Online-Audio-Monitor\\_Austria\\_2025.de.html](http://www.rtr.at/medien/aktuelles/publikationen/Publikationen/nin/Not_NewsCenter_Publikationen_2025/Online-Audio-Monitor_Austria_2025.de.html).

#### 9.1.1.1.8 2025 Media Literacy Report

As in previous years, the 2025 Media Literacy Report brings together perspectives from technology, law, civil society and digital practice. Close linking of research and practice are especially visible in this year's report. Research articles—including a summary of initial findings from the Digital Skills Austria study and an interim report on a research project conducted by the St. Pölten University of Applied Sciences with upper secondary students—provide an empirical grounding, place the subject in its academic context and chart current developments. Additional theoretical analysis supports understanding issues in context.

Whether users are informed or manipulated is an especially relevant issue within the digital domain, with misinformation often being spread by platforms. This aspect is explored through interviews with expert practitioners. To provide an especially comprehensive picture of the subject, the report also includes insights from public figures as well as counselling and competence centres.

Projects and initiatives from the RTR Media Literacy Atlas also feature prominently in the report. The atlas serves as a portal that ensures the visibility of nationwide activities to foster media literacy in Austria.

The report covers the status quo, insights, research findings and perspectives on the topic of media literacy, and is available (in German) on the RTR website at [www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen\\_2025/Medienkompetenz-Bericht\\_2025.de.html](http://www.rtr.at/medien/aktuelles/publikationen/Publikationen/Publikationen_2025/Medienkompetenz-Bericht_2025.de.html).

The costs incurred by RTR for the preparation of the 2025 Media Literacy Report, totalling EUR 24,022.00 (net), are reported pursuant to Art. 20 Par. 5 B-VG.

### 9.1.1.2 Events

#### 9.1.1.2.1 Protection of freedom of expression in the DSA

Acting in its role as Austria's Digital Services Coordinator (DSC), KommAustria presented the key findings from its study "[Protection of freedom of expression in the Digital Services Act](#)" on 13 March 2025 (in German). The event, part of the authority's programme of DSA-related events, was organised with the support of the RTR Media Division. More detailed information about this event is provided in [section 3](#).

#### 9.1.1.2.2 Digital Services Act – How Europe protects against hate speech

On 6 May 2025, KommAustria held a panel discussion entitled "Digital Services Act—how Europe protects against hate speech!". The aim was to explore what targeted efforts are underway to counter the rising wave of digital hate and discrimination and what comparable structures already exist. The event was organised with the support of RTR's Media Division. More detailed information about this event is provided in [section 3](#).

#### 9.1.1.2.3 Presentation of the "2025 DAB+ digital radio Austria" study

RTR's Media Division presented the results of its "2025 DAB+ digital radio Austria" study at an event held on RTR's premises on 10 April 2025. This annual survey is commissioned by RTR from Ipsos Market Research and conducted with a representative sample of the population. Further details of this study can be found in [section 3](#).

#### 9.1.1.2.4 Presentation of the 2025 Video Survey

On 5 June, the RTR's Media Division and the TELETEST Working Group (AGTT) jointly presented the [2025 Video Survey](#)—the tenth edition of this annual survey on video usage among the Austrian population aged 14 and over, which covers both the video sources and video platforms used. Further details of this study can be found in [section 9.1.1.1.5](#).

#### 9.1.1.2.5 Austrian Media Days and Research Prize

The RTR Media Division awarded the Research Prize for Media Change and Transformation for the second time during this year's Austrian Media Days. One of the items on the main stage programme was a pitch session, where the finalists had the chance to briefly present the key findings from their Bachelor and Master's theses as well as the conclusions applying to the media sector. An expert jury, consisting of Elisabeth Hödl (Professor of IT Law, University of Graz), Katharina Schell (Deputy Editor-in-Chief, APA) and Peter Winkler (Professor of Communication Science, University of Salzburg), selected the winners.

#### 9.1.1.2.6 RTR informational event: Audio podcast subsidies

An initial information event on the new audio podcast subsidies was held on RTR's premises in May 2025. Organised by the Media Division's funding department, this event aimed to give potential applicants practical insights into the grant process and enable direct dialogue with industry representatives.

#### 9.1.1.2.7 AI media roundtables in 2025

The AI Media Roundtable, a regular dialogue format for addressing urgent issues relating to the use of artificial intelligence in the media industry, met on 2 October 2025. Organised by the Media Division in its role as a competence centre, the roundtable draws its members from the ORF, the Association of Austrian Newspapers (VÖZ), the Austrian Association of Regional Media and Regionalmedien Austria, the Association of Austrian Private Broadcasters (VÖP), the Digitalradio Österreich association and the Austria Press Agency (APA). KommAustria participates in roundtable sessions as an observer.

In the session held on 2 October, members of the roundtable first addressed recent developments associated with the gradual entry into force of the European AI Act and its resulting legal obligations. Attendees then turned their attention to developments in the regulation of AI in other parts of the world, including the US and Asia.

The second part of the session was reserved for identifying topics to be tackled over the next few months. The members agreed on a need for the uniform labelling of AI-generated content to enhance transparency of such content for media consumers. Measures for handling tools such as AI-enhanced search engines were also considered particularly relevant—specifically the discoverability of Austrian media content in relation to contested copyright interests. These issues will now be taken up by the AI Service Desk in the RTR's Media Division and evaluated before the next AI Media Roundtable.

#### 9.1.1.2.8 Presentation of the 2025 Online Audio Monitor Austria

In October, the RTR Media Division hosted attendees at the presentation of the 2025 Online Audio Monitor. The study, currently the third in the series first presented in 2023, was commissioned by the Media Division from market research institute Ipsos (see also [section 9.1.1.1.7](#)).

### **9.1.1.2.9 Information instead of manipulation—how to achieve media literacy amidst the flood of information?**

At an event held on RTR's premises on 13 November, the Media Division presented the Media Literacy Report, this time focused on the issue of disinformation. Topics covered by the event programme included the definition of disinformation, the forms it assumes and the mechanisms by which it operates, and—most importantly of all—the strategies and support resources that a society requires to respond resiliently to disinformation content.

The first part of the event included presentations from Marian Adolf (Professor at the Department of Communication, FH Wien der WKW), media trainer Alen Velagić (Postmodern Solutions), Markus Schwinghammer (DisinfoConsulting) and Ulrike Schiesser (Federal Office for Cult Affairs).

In the second session, a panel discussion was held with high-profile speakers including Alice Krieger-Schrohm (Youth Media Protection Association), Eva Wackenreuther (ORF) and Marian Adolf. Together, the panellists addressed the key issue of how to support people in handling disinformation while preserving public trust in the media and the democratic process.

## **9.1.2 Activities of the Telecommunications and Postal Services Division**

### **9.1.2.1 Studies and publications**

#### **9.1.2.1.1 Cybersecurity and artificial intelligence: potential and challenges**

The study "Artificial intelligence in cybersecurity—opportunities and risks" offers a comprehensive overview of the current state of technology in the field of cybersecurity. Further details of the study are presented in [section 8.5.1](#).

#### **9.1.2.1.2 Artificial intelligence in human resource management**

The Service Desk for Artificial Intelligence conducted a representative survey on the use of artificial intelligence in human resource management and its implications in the context of the EU's AI Act. The study is presented in more detail in [section 8.5.2](#).

#### **9.1.2.1.3 Survey of internet connection usage by households and businesses (2025 demand-side survey)**

In the period February to mid-April 2025, RTR investigated the use of various internet access technologies as well as patterns of switching between mobile and fixed access systems. The survey covered 2,000 households and 1,000 businesses. In the final analysis, RTR found that mobile broadband access via cubes was now increasing in both demand and usage, and among private households and business customers alike. There are several reasons for this trend. Mobile cubes are simple to set up anywhere they are needed, incur no extra installation fees and are often cheaper than a fixed internet connection. While private customers typically use their cube instead of a fixed connection, larger business customers often run the cube as a second, backup solution alongside their fixed broadband service.

The demand for optical fibre connections was also surveyed. On the supply side, although the availability of fibre access is rising steadily across Austria nationwide, demand is currently staggering. The survey reveals two key reasons why private customers have yet to sign up for an optical fibre connection: either these households are already happy with their existing connection or the price for fibre-based products is still seen as prohibitively high.

The results of the 2025 demand-side survey (in German), along with the underlying data, are available on the RTR website at <https://www.rtr.at/TKP/aktuelles/publikationen/publikationen/BerichtNASE2025.de.html>.

## 9.1.2.2 Events

### 9.1.2.2.1 Cybersecurity in the age of artificial intelligence

For full details of the professional event initiated by the AI Service Desk that took place at RTR in January 2025, see [section 8.4.1](#).

### 9.1.2.2.2 AI in personnel management and employment

[Section 8.4.2](#) presents further details of the professional event hosted jointly by the AI Service Desk and the Vienna Chamber of Labour in April 2025.

### 9.1.2.2.3 The 26<sup>th</sup> Salzburg Telecom Forum

The two-day Salzburg Telecom Forum was organised by RTR, the University of Salzburg and the European Commission in September 2025. Held as an in-person event on the premises of the Edmundsburg, the first day's programme focused on the political dimension of digital sovereignty. The morning session included presentations by Peter Stuckmann (Head of Unit, DG CNECT, European Commission) on digital sovereignty in European discourse, and Bernd Wagner on AI, cybersecurity and cloud computing. This session closed with a talk by Thomas Arnoldner (Deputy CEO, A1 Telekom Austria Group) on the role of infrastructure operators in securing digital sovereignty. The afternoon session opened with a presentation from Prof. Wolfgang Pree (Dept. of Computer Science, University of Salzburg) on how AI is revolutionising the world of IT. This was followed by a panel discussion on digital sovereignty perspectives chaired by Helmut Spudich. Panellists were Ines Holzegger (Spokesperson for Digitalisation, NEOS), Michael Neuber (Head of Cloud Northern Europe, Government Affairs and Public Policy, Google), Peter Stuckmann and Bernd Wagner.

The second day of the Salzburg Telecom Forum was devoted to the legal aspects of digital sovereignty.

Andreas Wiebe from the University of Göttingen spoke about the approach to digital sovereignty taken in European data strategy and lawmaking. Clemens Thiele (University of Salzburg) followed with an exploration of individual control over one's own image, examining several aspects of copyright and personality rights. The last presentation was given by Thomas Thalhofer, IT law specialist at NOERR, who offered a critical analysis of the EU AI Act. The second day closed with a discussion of the papers presented, chaired by Sonja Dürager, partner at bpv Hügel.

### 9.1.2.2.4 AI in local administration

For detailed information about the professional event initiated by the AI Service Desk that took place at RTR in December 2025, [see 8.4.4](#).

## 9.1.3 Convergent activities

### 9.1.3.1 RTR professional event: Old strengths and new powers

On 11 November, RTR held a professional event on the future of media, telecommunications and platforms. Organised jointly by the Media Division and the Telecommunications and Postal Services Division at RTR, this symposium was attended by leading experts from Austria, Germany and Switzerland as both speakers and panellists.

In their welcome address, RTR's two managing directors addressed the core issues experienced in the corresponding sectors, noting that digital media and access infrastructure are inextricably intertwined, and need to be both developed and further improved. The speakers contended that domestic providers in both sectors are now faced with asymmetric competition from well-funded international corporations who exploit national investment in networks and media content as a springboard for their own marketing models. The result, in their view, is conflicting interests between the future prospects, financing and regulation of digital media and infrastructure at both national and European level.

Cara Schwarz-Schilling (Director, Wissenschaftliches Institut für Infrastruktur und Kommunikationsdienste GmbH, Germany) was joined by leading expert for digital media Andreas Gall (Chief Digital Officer, d&b Audiotechnik and CEO Human-Centric-Innovators GmbH) to present keynotes introducing the conference topics.

A panel discussion chaired by Elke Rock followed, in which leading experts emphasised the pan-European dimension of the issues highlighted. The panellists were Claus Grewenig (Chairman, German Association of Private Media, VAUNET), Corinna Milborn (Head of News, Pro7Sat1Puls4), Anna Pirhofer (Managing Director Technology, Media and Telecommunications, Boston Consulting Group), Christian Schalt (Chief Digital Officer, RTL Radio Deutschland), Alexander Scheuer (Head of Media Policy and Media Regulation, Deutsche Telekom) and Florian Tursky (Acting Chairman, Vodafone Institute).

Overall, the symposium highlighted two key concerns: the dramatic loss of advertising revenue to very large online corporations and the latter's use of AI to exploit national media products. Attendees also called for efforts to address recent developments in infrastructure. Satellite networks were highlighted as especially problematic, as these are operated by global, non-European providers. Taken together, these issues were seen by participants as posing a significant risk to network sovereignty, media and opinion pluralism, and Europe's digital competitiveness. This risk should therefore be met by the agreement and enforcement of fair solutions and regulations at EU level.

## 9.2 Public relations: information and transparency

Every year, the events and studies organised in the context of RTR's role as a competence centre are supplemented by numerous public relations activities. These activities aim to familiarise the general public with the specific work of the regulatory bodies KommAustria, TKK, PCK and RTR while also promoting transparency.

### Conventional and social media relations

'Conventional' PR activities such as press releases and conferences were used to provide information about matters such as regulatory decisions, issues relating to regulation, changes in regulated markets and grant decisions. Considerable use is also made of LinkedIn as a social media channel for communications: posts are used to promote the publication of press releases and articles, for example, or provide information about events or international developments.

## Enquiry management

RTR deals with a large number of enquiries daily, both by phone and in writing, with increasingly complex issues emerging. In 2025, a total of 3,455 enquiries were submitted to [rtr@rtr.at](mailto:rtr@rtr.at). Most of these enquiries were answered within one working day. As always, most enquiries involved issues affecting end users.

**Table 59: Volume of enquiries, 2023 to 2025**

	2023	2024	2025
Number of enquiries to <a href="mailto:rtr@rtr.at">rtr@rtr.at</a>	2,897	3,146	3,455

Source: RTR

For initial enquiries relating to user protection and conciliation procedures in the media, postal and telecommunications sectors, consumers can obtain advice from a team of experts by calling 01 58058 888 (weekdays only). A total of 3,921 over-the-phone consultations were conducted in the reporting year, 2% less than in 2024.

## Information platform [www.rtr.at](http://www.rtr.at)

The [www.rtr.at](http://www.rtr.at) website comprehensively documents the entire spectrum of activities by the regulatory bodies KommAustria, the TKK, the PCK and RTR, while offering insights into developments within the regulated markets. RTR promptly publishes on the website decisions and information designated for disclosure from the scope of regulatory activities and grant administration. A series of e-government and online services is also offered, both for companies and for private citizens. The content of this service portfolio is continually being enriched and technical aspects improved.

## Information events

Numerous workshops and information events were held in the reporting year to disseminate information relevant for market participants and the interested public. Refer to [sections 9.1](#) for more details.

## Publications

Another focus in public relations are the many publications and studies that are made available to the interested general public as downloads on the RTR website. During the 2025 reporting year, these publications included the Communications Report, which fulfils legal reporting requirements, the annual report of the conciliation bodies for telecommunications and postal services, the Net Neutrality Report, the Media Literacy Report, and a number of studies. Selected publications are presented in more detail in [sections 9.1](#).

Five issues of the media newsletter and four issues of the telecoms newsletter were used to provide up-to-date information about regulatory decisions, invitations to tender, events and international affairs.

The RTR Telekom Monitor, RTR Internet Monitor and RTR Post Monitor, which are published on a quarterly basis, provide summaries of data collected by RTR pursuant to the Communications Survey Ordinance (KEV) and Postal Services Survey Ordinance (PEV). The monitors include market data on the telecommunications and postal markets, with these data also provided as Open Data on the RTR website.





## Market development in the focus of regulation

# 10 Market development in the focus of regulation

## 10.1 The Austrian communications and advertising markets

### 10.1.1 Developments in the advertising market

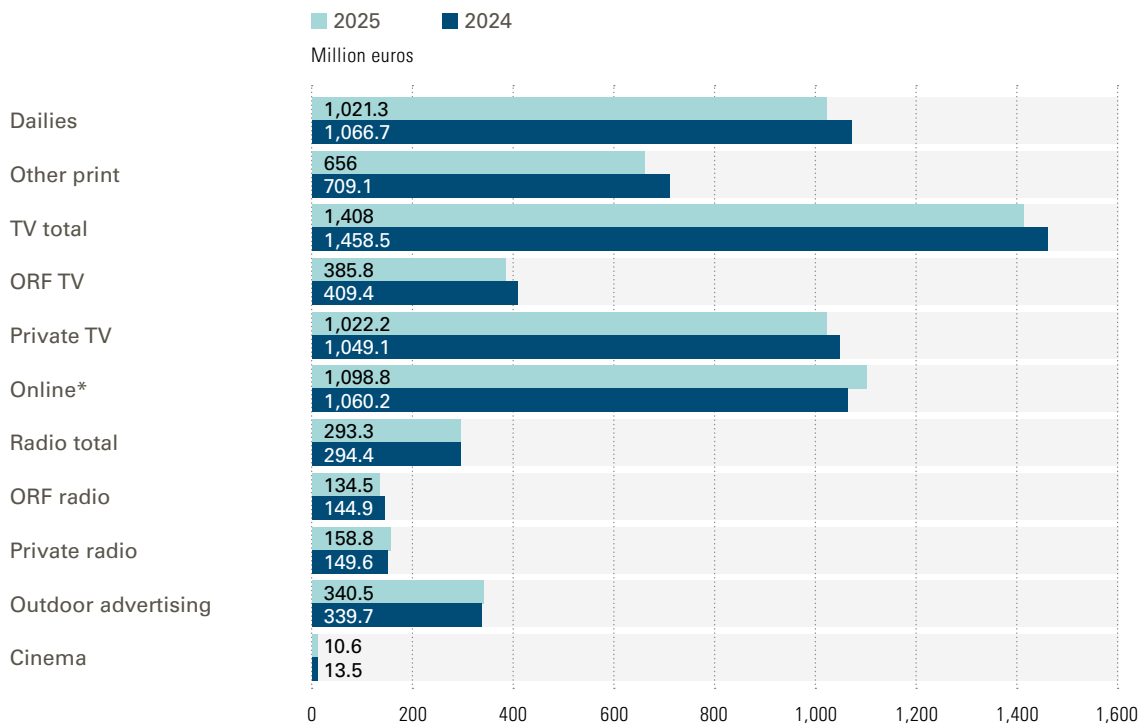
Changes in the advertising market are typically evaluated by media category. A uniform set of data collection methods is normally used for traditional media categories such as television, radio and print. Yet, for the definition of the online media category, various data sources use varying classifications. For this reason, the figures presented in this report for the online media category differ depending on the data source. The exact definition applicable in each case can be determined by consulting the original sources as stated in this report.

#### Advertising report for 2025: online, radio and cinema gain while print and television lose

Gross advertising figures for the individual media categories can be obtained from the 2025 advertising report by Focus Media Research.

In a month-on-month comparison with the previous year, with the exception of January and April gross advertising expense in 2025 declined each month compared with the respective month in 2024.

Figure 44: Gross advertising expenditure in Austria by category in 2024 and 2025



Data: FOCUS Research 2025

\* Online: Projection based on interviews (advertising businesses and media agency representatives)

The print category recorded a decline of 5.5% to EUR 1677.3 billion. The category of daily newspapers dropped by 4.3% to EUR 1,021.3 million. Other print media suffered losses of 7.5%.

The television media category declined 3.5% to EUR 1.408 billion. Within this segment, private television slipped by 2.6%, while the ORF television channels fell more steeply by 5.8%.

With EUR 293.3 million, radio closed 2025 just under the previous year's figure of EUR 294.4 million, which translated to a loss of 0.4%. Private radio rose by 6.1% while ORF radio recorded a decline in its gross advertising figures of 7.2%.

Cinema advertising amounted to EUR 10.6 million in 2025 after achieving some EUR 13.5 million in the previous year. This corresponds to a 21.5% decrease.

Online advertising maintained its steady growth trajectory. These data include the category titles: online, traditional, mobile, SEA, and social & video (as cited from the Focus Media Research report). Growth in 2025 was by 3.3%, increasing from EUR 1.0602 billion to EUR 1.0988 billion, which translates to an absolute increase of EUR 38.6 million. According to government figures for digital tax revenues, however, gross advertising sales for online advertising in Austria by companies subject to digital tax actually reached around EUR 2.74 billion in 2025. This makes online the best-performing media category for media sales in Austria by a wide margin.

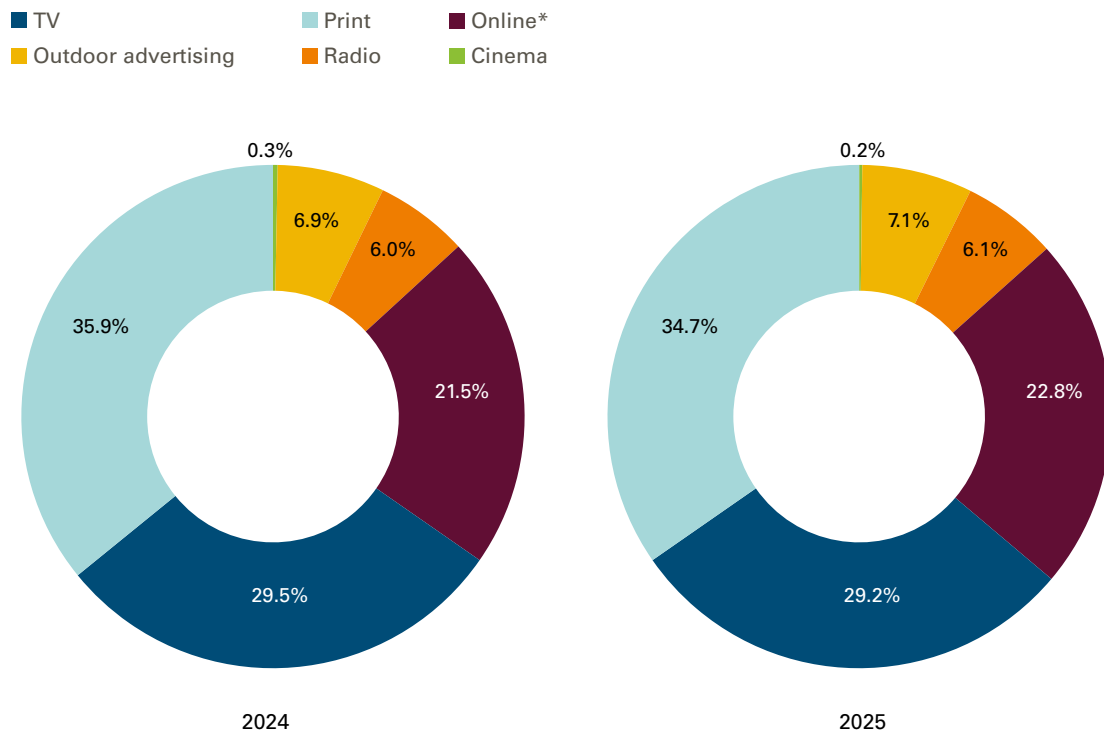
Within the online advertising category, FOCUS has consistently reported very strong growth for social media, which gained 8.5% (2024: 10.3%; 2023: 11.4%; 2022: 24.6%; 2021: 17.9%) to reach EUR 176.4 million. Gross advertising expenditure on search engine advertising also recorded strong gains, rising by 3.6% (2024: 6.7%; 2023: 12.4%; 2022: 19.1%; 2021: 12.3%) to EUR 268.5 million. Growing the most, online video rose by 15.3% to EUR 192.8 million (2024: 24.7%; 2023: 9.7%; 2022: 17.5%; 2021: 15.3%). Online mobile—online advertising tailored specifically to mobile user devices—achieved gross advertising income of EUR 71.1 million for a drastic 15% decrease (2024: 3.1%; 2023: 3.1%; 2022: 4.8%; 2021: 4%). Traditional online advertising—such as banners on websites—remained fairly stable with growth of 0.6% in 2025 to EUR 390 million (2024: 14.9%; 2023: 8.5%; 2022: 1.5%; 2021: 10.6%).

Within outdoor advertising, with gross advertising income climbing by 0.2% from EUR 339.7 million to EUR 340.5 million in 2025, billboard gained by 2.0% to reach EUR 150 million. Increasing the most in 2025 was the digital out-of-home subcategory, which posted EUR 117.2 million and growth of 7%. Revenue from street furniture in 2025 was EUR 54.4 million, thereby dropping by 5.9% compared with 2024. Within outdoor advertising, the subcategory of transport suffered after street furniture the second-most serious setback, posting gross income of around EUR 17.4 million and a 2.8% loss year on year. The smallest gross revenue figure was posted by ambient media, which earned EUR 3.4 million in 2025 (2024: EUR 3.5 million). This corresponds to a 1.8% decrease.

### **Percentage distribution of gross advertising expenditure by category**

Looking at the distribution of total gross advertising expenditure of EUR 4.83 billion across conventional media, cinema and online media (2024: EUR 4.94 billion), the share taken by online advertising showed strongest growth, expanding by 1.3 percentage points to take an 22.8% slice of the advertising pie in 2025.

**Figure 45: Percentage shares of gross advertising expenditure in Austria by category in 2024 and 2025**



Source: FOCUS Research 2025, 2025 and 2024 Advertising Report

\*Projection based on expert interviews

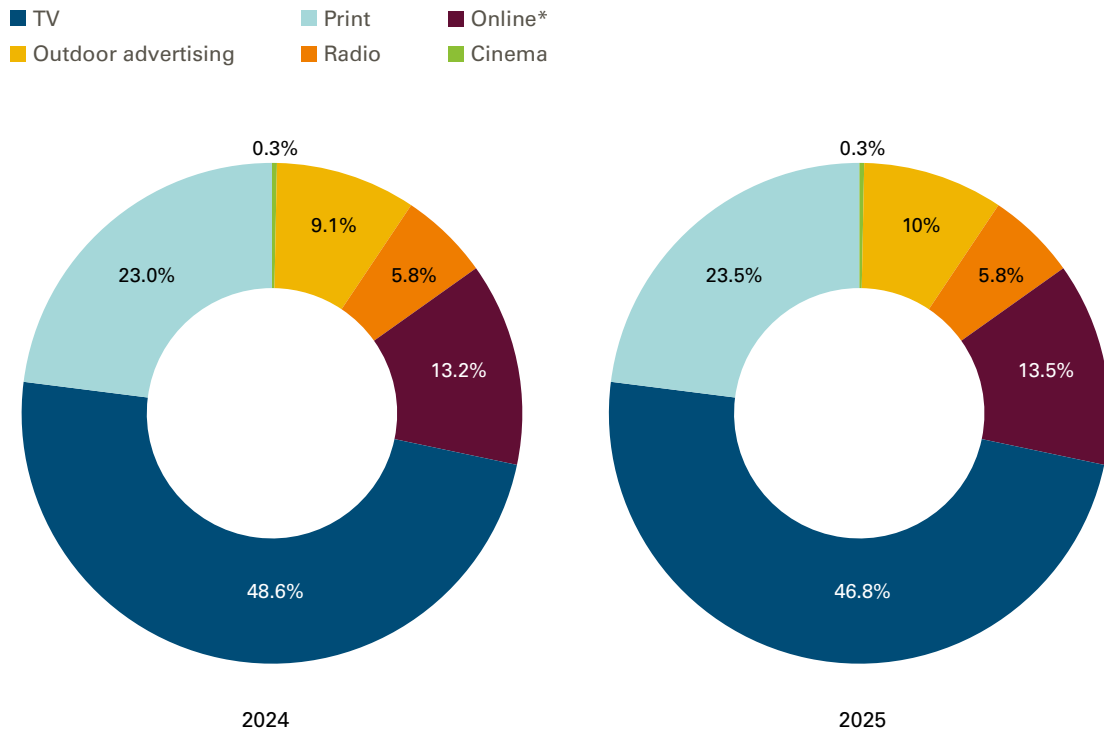
The gains made in online advertising came at the expense of print, which posted a loss of 1.2 percentage points to record the largest overall decline among media categories. Print media nevertheless once again took the largest share, accounting for 34.7% of gross advertising expenditure (2024: 35.9%). The share of gross advertising expenditure taken by television advertising marginally decreased by 0.3 percentage points to 29.2% in 2025 (2024: 29.5%). Overall, radio rose from 6.0% to 6.1% in 2025. Outdoor advertising increased its percentage share in 2025 to 7.1% after 6.9% in 2024, which represents a slight uptick of 0.2% when compared with the year before. At 0.2% in 2025, cinema held an even smaller share than in the previous year.

### Comparison with Germany

Nielsen surveys the gross advertising figures by media category as part of its Ad Trends for Germany report for 2025. The gross figure decreased by 5% in 2025 to around EUR 35.4 billion. Television took first place among the media categories with EUR 16.6 billion and a decline by some 4.2% in 2025. Within this segment, over 90% of revenues are generated in Germany by private television. Newspapers reached EUR 6 billion in Germany, meaning growth of 3.8% compared with the previous year. This increase for newspapers was offset by a 3.7% decline among general interest magazines to EUR 2.3 billion. Radio rose by 0.3% to some EUR 2.1 billion. The highest percentage growth of 9.9% was recorded by outdoor advertising. This equates to an absolute value of EUR 3.6 billion for 2025. Cinema had the smallest share at EUR 0.1 billion, which equates to a decline of 0.8%.

Among the overall market share of media categories, the most significant change was the increase in outdoor advertising from 9.1% to 10%, while radio fell from 23.0% to 23.5%. Television saw its share shrink by 1.8% to 46.8% in 2025. This share for Germany is still very much larger than in Austria, where the equivalent figure is just 29.2%.

**Figure 46: Percentage shares of gross advertising expenditure in Germany by category in 2024 and 2025**



Source: FOCUS Research 2025, Werbebilanz 2025 & 2024

**Online market according to Momentum survey**

As mentioned in the introduction to this section, in relation to market size, various surveys of the online media category exist.

For its 2025 spending study and 2026 forecast, Momentum used a methodology of 103 structured, in-person interviews with media agencies, publishers, marketing companies and advertising buyers, conducted during January to April 2026. The results presented are based on estimates from the market participants interviewed as well as figures from publicly available market data.

For 2025, Momentum has arrived at a net online advertising market size of EUR 3.24 billion. Following a figure of EUR 2.97 billion net for 2024, this equates to a growth rate of 9.2%. The figures as stated include formats such as conventional online advertising (display, video, mobile), social media marketing, keyword marketing, affiliate marketing, classifieds and directories, integrated content, native advertising, email marketing, newsletter advertising, online auctions, long-term integration partnerships, sponsorships, in-game advertising, digital audio and connected TV. All format titles here are cited from the study itself.

The Momentum study identifies around 86% of online advertising spending as accruing to international providers, which corresponds to a value of some EUR 2.80 billion. Keyword marketing accounts for the largest share at 39.9%. The second-largest share at 39.1% is invested in social media marketing. This is followed by Amazon advertising with 10.7%, YouTube with 6.3%, and the Google Network with 2.1%. The remaining 1.8% is attributed to affiliate marketing. From the investments in social media marketing totalling around EUR 1,094.3 million, the largest shares belong to Facebook (EUR 446.6 million) and Instagram (EUR 412.2 million). TikTok follows in third place with some EUR 145 million.

The following table shows trends in online net advertising figures for Austria based on the Momentum survey.

**Table 60: Austrian online net advertising volume in 2024 and 2025 according to Momentum survey**

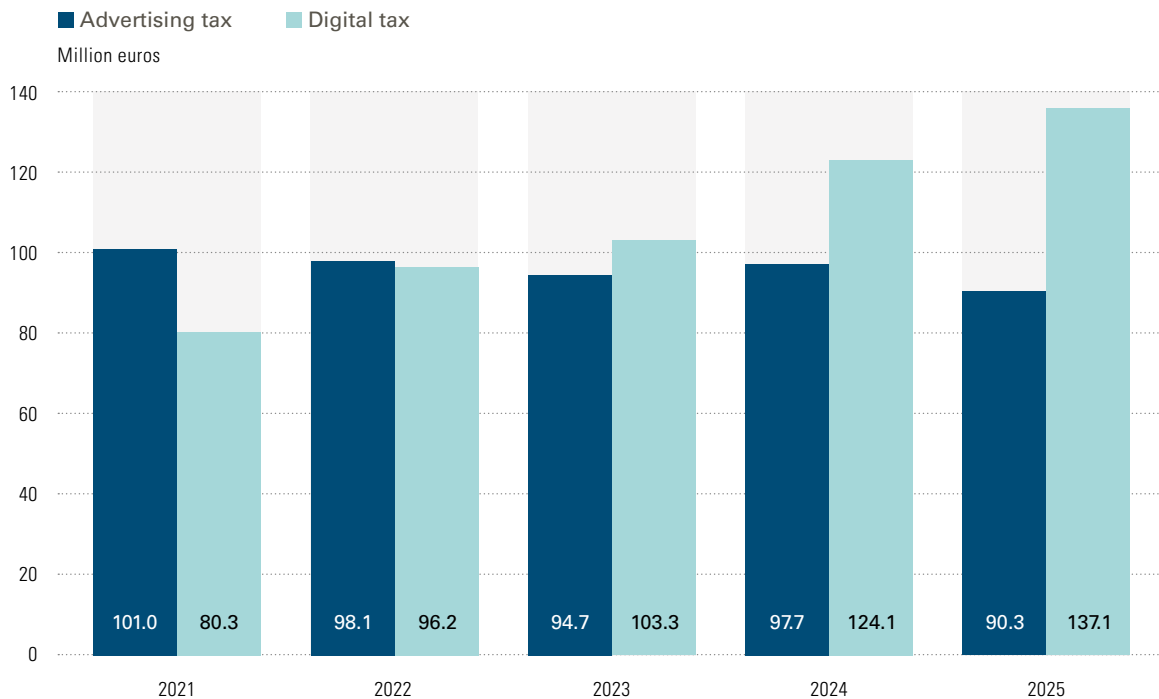
Online advertising revenues	Net advertising volume in 2024 (EUR millions)	Net advertising volume in 2025 (EUR millions)	Share for 2025 in %	Growth between 2024 and 2025 as a percentage compared with the Momentum report for the previous year
Conventional online advertising (display, video, mobile)	499	501.3	15.5%	0.5%
Social media marketing	959.5	1,094.3	33.7%	14.0%
Keyword marketing	1,042.8	1,118.3	34.5%	7.2%
Affiliate marketing	40.1	51.3	1.6%	27.9%
Amazon advertising	266	300.5	9.3%	13.0%
Classified markets	120.3	116.7	3.6%	-3.0%
Other	42.8	60.4	1.9%	41.1%
<b>Total</b>	<b>2,970.5</b>	<b>3,242.8</b>	<b>100.0%</b>	<b>9.2%</b>

### Digital tax revenues

Since the introduction of the digital tax in Austria in mid-2020, the income from this tax has enabled an indicator of the shares of online advertising spending in the Austrian market that are accounted for by major international platforms.

From revenue collected by the Federal Ministry of Finance (BMF) at a 5% digital tax rate on net income earned by major online platforms (2024: EUR 137.1 million), the outflow of ad revenue from the Austrian market was EUR 2.74 billion in 2025.

**Figure 47: Revenues from advertising tax and digital tax (2021–2025)**



Source: BMF

## 10.1.2 The Austrian television market

### 10.1.2.1 Television viewing

On average, linear television reached 69.9% of the population aged twelve and over in 2025. This corresponds to a significant increase of roughly 4 percentage points from 2024 (66%), when daily reach had risen by a marginal 1.6 percentage points to end a three-year downward trend (2023: 64.4%; 2022: 66.5%; 2021: 69.2%; 2020: 70.3%). This means that television reach in 2025 was again comparable to the record levels seen in the pandemic years of 2020 and 2021.

Average viewing time, in contrast, fell for the fifth year in a row in 2025, although the loss of 5 minutes to 165 minutes per day was less than in previous years (2024: -6 minutes to 170 minutes; 2023: -10 minutes to 176 minutes; 2022: -17 minutes to 186 minutes). Until the first pandemic year of 2020, television viewing time had consistently increased by single-digit minute figures to peak at 209 minutes.

The average time spent by viewers aged twelve and over in front of the television also fell sharply again in 2025, shedding 25 minutes to end on 221 minutes per day. Unlike viewing time, which considers the average time spent using the television by all persons in TV households—including household members who do not watch TV—the ‘time spent viewing’ is a metric calculated only from the average usage time of the proportion of the population that actively watches TV. Up until the pandemic, time spent viewing had consistently followed an upwards trajectory for decades, reaching a new high of 291 minutes per day in 2020. In 2021, this trend reversed. In the space of five years, the metric fell to a level last seen in 2001, namely 219 minutes/day (2024: 246 minutes; 2023: 264 minutes; 2022: 271 minutes; 2021: 285 minutes).

Unless otherwise indicated, the usage data presented here for television broadcasters able to be received in Austria are supplied by TELETEST, as commissioned by the TELETEST Working Group (AGTT) since 2007. In September 2024, the name of the project was amended to TELETEST 2.0 in response to the a change in methodology. The AGTT is a collaboration between Austrian television broadcasters and their advertising slot marketers. The group commissioned market research institute GfK Austria (TV panel/data production/data integration) and TV-Insight GmbH (HbbTV measurement and projection) with the survey. GfK Austria's TELETEST panel derives data via TV-Insight (TVI) , in this case as of January 2025, from a representative sample of the Austrian population (with around 1,505 TV households and roughly 3,325 people aged three and over) using devices that are connected to receivers. These data are then merged with the feedback channel data from over 1.1 million online HbbTVs<sup>49</sup> in Austria.<sup>50</sup> As a result, TELETEST 2.0 provides personal viewing data—accurate to the second—for linear and time-shifted television viewing.

### Daily reach for television channels in 2025

Overall daily reach for linear television rose among viewers aged twelve and over in 2025. When examined in terms of individual television channels, this growth can largely be attributed to gains made by foreign television channels. For Austrian channels, however, figures for daily reach remained essentially unchanged year on year in 2025. Instead, the data bear witness to fractional gains and losses that, when taken together, remain firmly within the margin of fluctuation. Bracketing this range of variation are ORF 1 with a gain of eight tenths of a percentage point and ORF III with a loss of six tenths of a percentage point.

With a total daily reach of 47.1%, the ORF television channels kept this reach figure stable year on year, and were therefore able to buck the persistent downward trend in reach observed since 2021 for viewers aged twelve and over (2024: 47.1%; 2023: 47.6%; 2022: 50.4%; 2021: 53.4%). Still, this figure is significantly below pre-pandemic levels (2019: 49.7%; 2018: 49.4%) and represents the lowest figure for reach in the last 30 years for the third consecutive year. Some shifts in reach share were seen within the ORF channels, however.

During 2022 and 2023, ORF 1 lost a total of just under 4 percentage points, falling to 23.3% daily reach and thus its historically worst figure. The channel then managed to halt the downward spiral in 2024 with a modest gain of four tenths of a percentage point to 23.7% daily reach. In 2025, ORF 1 continued this trend by adding eight tenths of a percentage point for 24.5% daily reach. ORF 2 maintained its lead as the channel with the greatest reach in 2025 but nonetheless continued its shallow downward trajectory, slipping to 36.3% (2024: 36.7%; 2023: 37.7%; 2022: 40.2%). ORF III also remained squarely on the downward path embarked on in 2022, shedding six tenths of a percentage point to fall to 10% daily reach in 2025 (2024: 10.6%; 2023: 10.8%; 2022: 11.7%). Before the pandemic, ORF Sport+ had been on an upward trajectory that almost took it past the 4% mark in 2019 (3.9%). After a change in fortunes from 2020 onwards, it nonetheless lost very little reach in 2025, slipping just two tenths of a percentage point to 2.8% (2024: 3%; 2023: 2.8%; 2022: 3.1%).

ServusTV, the most successful channel in the private broadcaster segment for Austrian viewers aged twelve and over, achieved 16.4% daily reach in 2025 and thus saw very little change to its figure from 2024 (16.6%). This might however imply that the daily reach 'success story' for ServusTV—starting at 10.8% in 2017—is perhaps running out of steam (2023: 14.7%; 2022: 15.5%; 2021: 15.6%).

ATV and PULS 4 continued their neck-and-neck race for second and third place in 2025 (ATV: 10.2%; PULS 4: 10%), with each channel managing to record modest gains of three to four tenths of a percentage point. All the same, both channels continued on the post-pandemic downward trajectories seen since 2020 (ATV: 13%; PULS 4: 12.6%). In 2024, ATV fell by sixth tenths of a percentage point to an average daily reach of 9.9%. This was the largest loss in reach for an Austrian private broadcaster that year and the first time in a decade that the channel had slipped below 10%. While oe24 TV also recorded a slight gain in reach of two tenths of a percentage point to 4.1% daily reach in 2025, this figure still remains seven tenths of a percentage point lower than the channel's record figure from 2021.

49 HbbTV: Hybrid Broadcast Broadband TV, middleware platform, open, international standard

50 Information available at <https://www.agtt.at/>

ATV 2 posted a daily reach of 3.7% in 2025 and therefore no change year on year, but remains on a downward trajectory compared with its record 5% reach figure from 2020. The krone.tv channel managed to maintain its daily reach figure of 0.9% for the third year running.

PULS 24 shed two tenths of a percentage point year on year to end 2025 on 3.3%, and thus continued its oscillation within the range 3.2% to 3.5% observed since 2020.

Other notable losses in reach among private broadcasters in 2025 were recorded only by the channels R9 and KURIER TV. R9 shed four tenths of a percentage point to 1.6% daily reach, thus falling below 2% for the first time since 2017. The channel has followed a downward trajectory since the record figure of 2.3% daily reach it posted back in 2018. The most significant loss in 2025 was suffered by KURIER TV, which fell six tenths of a percentage point to 0.2% daily reach. Formerly schauTV, the channel has broadcast as KURIER TV since February 2023. This figure may be attributable to the decision, taken in early 2025, to cease transmission of KURIER TV via satellite, and shift the focus to cable networks and live streaming.

German private broadcasters represent the most-viewed foreign TV channels in Austria (with and without Austrian advertising slots). In 2025, their overall daily reach rose by 1.6 percentage points to 36.2%, which more or less compensated for the losses suffered in 2024 and 2023 (2022: 36.6%). Nonetheless, daily reach for German private broadcasters in Austria continues to remain far below the level for the record pandemic year of 2020 (41.7%) and even the figures for the pre-pandemic years (2017: 39.5%; 2018: 39.9%).

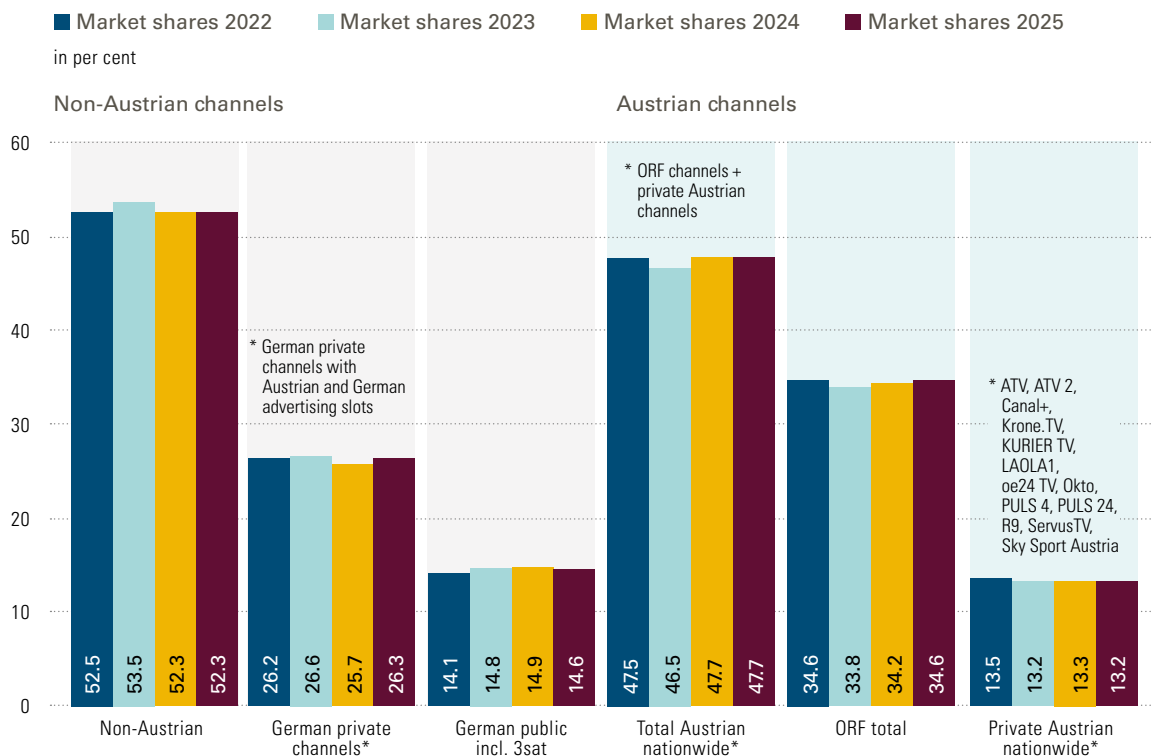
### 10.1.2.2 Market shares of Austrian and non-Austrian television channels

In terms of cumulative market share, neither the Austrian television channels nor the foreign television channels saw any movement year on year in 2025. In terms of minutes; the Austrian viewing population aged twelve and over on average each day watched foreign channels longer than domestic programmes.

A channel's market share depends on how long that channel was actually viewed, unlike daily reach, which merely represents how many more people even tuned into the channel once a day—possibly only for a few minutes. To increase market share, a channel must actually be used for a longer period of time than in the previous year and the rate of increase for this channel must also be greater than for its competitors in order to obtain a higher percentage of total television minutes viewed in Austria.

In 2025, domestic channels (the ORF and private broadcasters) retained their market share of 47.7% from 2024, and therefore largely held on to the larger share first achieved in the pandemic years of 2020 (45.6%) and 2021 (48.2%). Although their market share briefly dipped 1 percentage point to 46.5% in 2023, Austrian channels made good this deficit in 2024. Since then, their 47.7% figure for market share is also the second-best figure (after 2021) in the last ten years (2023: 46.5%; 2022: 47.5%; 2021: 48.2%; 2020: 45.6%). Between 2013 and 2020, domestic channels collectively achieved annual market shares ranging from 44% to just under 46%. In 2021, the ongoing pandemic and political upheavals continued to fuel demand for domestic news and current affairs programming while powering an upward trend in market share for domestic channels.

**Figure 48: Market shares of Austrian and non-Austrian TV channels among individuals aged 12+, 2022–2025**



Source: from 1 September 2024: AGTT TELETEST 2.0; up to 31 August 2024: AGTT/GfK TELETEST; Evogenius M<sup>3</sup>; 1 January 2021 to 31 December 2025; weighted by person; including VOSDAL/timeshift; market share in %, individuals 12+

In contrast, overall market share for non-Austrian television channels fell as low as 51.8% during the pandemic years of 2020 and (especially) 2021. Before the pandemic, non-Austrian channels had achieved a peak market share as high as 57.3% (2017), while the domestic share had receded correspondingly to levels as low as 43%. Since then, Austrian channels have clearly managed to sustain the momentum gained from a demand for domestic news and current affairs during the pandemic.

Among non-Austrian channels, those originating from Germany are naturally those that attract the largest domestic viewing public. Private German and public channels achieved a collective Austrian market share of 40.6% in 2025, which corresponds exactly to the figure posted for 2024 (2023: 41.4%; 2022: 40.2%; 2021: 39.9%), slight shifts in share were observed within this group.

In 2025, German public channels—comprising ARD, the ARD regional channels, ZDF, ZDF neo and 3sat—achieved a market share of 14.3%. This result represents an overall loss of six tenths of a percentage point year on year (2024: 14.9%; 2023: 14.8%; 2022: 14%; 2021: 14%). Overall market share for German private channels with Austrian advertising slots, along with the market share of the same channels with German adverts (satellite reception), rose accordingly by six tenths of a percentage point to 26.3% (2024: 25.7%; 2023: 26.6%; 2022: 26.2%; 2021: 26.1%). The year 2024 marked a historical low point for German private broadcasters, whose market share was around 4.5 percentage points below the peak figure in the last ten years (2015: 30.1%).

Other non-Austrian channels achieved a combined market share of 11.7% in Austria in 2025.

### 10.1.2.3 Market shares of Austrian television channels

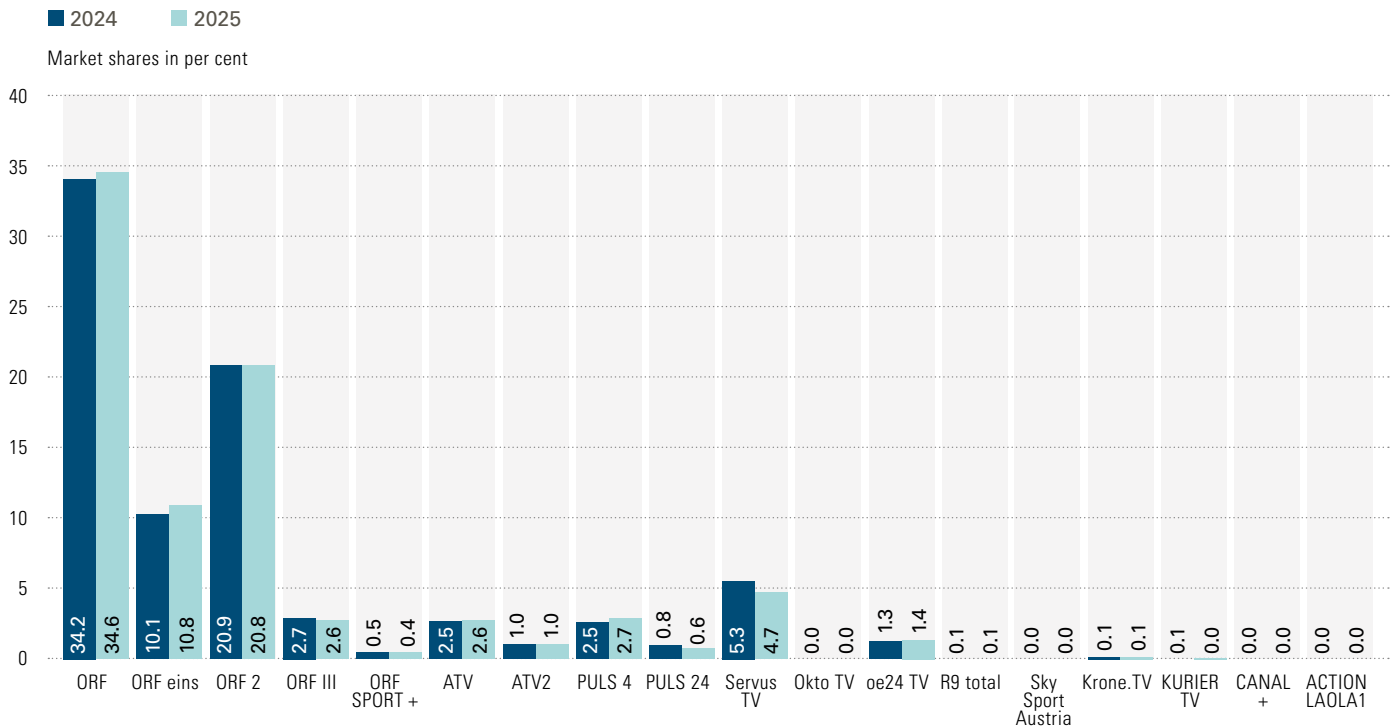
Closer scrutiny of market share results posted by Austrian television channels in 2025 reveals only minimal year-on-year movement. For the most part, figures vary by only one or two tenths of a percentage point and thus remain firmly within the margin of fluctuation. Outlier channels at the top and bottom ends of the scale for 2025 were ORF 1 (gain of seven tenths of a percentage point to 10.8% market share) and ServusTV (loss of six tenths of a percentage point to 4.7% market share).

With a market share of 4.7% in 2025, ServusTV retains a clear lead over its competitors in the private Austrian television segment. All the same, the broadcaster saw its share shrink by six tenths of a percentage point in 2025 and therefore recorded the largest loss of any Austrian or German channel. ServusTV had only recently consolidated its pole position among domestic private broadcasters in 2024, when it achieved a whole percentage point of growth for a market share of 5.3% and thus continued its long-standing upward trend (2023: 4.3%; 2022: 4.3%; 2021: 3.7%; ...; 2015: 1.6%).

Other Austrian private broadcasters remained largely stable within the margin of fluctuation in 2025. PULS 4 (2.7% market share), ATV (2.6% MS<sup>51</sup>) and oe24 TV (1.4% MS) each gained one tenth of a percentage point. For ATV and PULS 4, this meant a brief pause in their long-standing negative trend. ATV's share was 3.5% in 2019, with PULS 4 reaching 3.4% in the same year. PULS 24, which has been sliding backwards since 2021, shed a further two tenths of a percentage point in 2025 for a market share of 0.6%.

On balance, the negligible positive and negative year-on-year fluctuations recorded by Austrian private broadcasters did not result in any appreciable change to overall market share in this segment. Considered together, ATV, ATV2, Puls 4, Puls 24, ServusTV, Okto, oe24 TV, R9, Sky Sport Austria, Krone.TV, KURIER TV, Canal+ and LAOLA 1 achieved a market share of 13.2% in 2025 (2024: 13.3%; 2023: 13.2%; 2022: 13.5%; 2021: 13.2%).

51 MS = market share

**Figure 49: Nationwide market shares of Austrian TV channels in 2024 and 2025**


Source: From 1 September 2024: AGTT TELETEST 2.0; up to 31 August 2024: AGTT/GfK TELETEST; Evogenius M<sup>3</sup>; 1 January 2024 to 31 December 2025; weighted by person; including VOSDAL/timeshift; market share in %, individuals 12+

In 2024, the ORF channels were able to buck the negative trend of the preceding years and improve their overall market share by just under half a percentage point to 34.2%. Modest gains were made again in 2025, taking these channels to a 34.6% market share (2024: 34.2%; 2023: 33.8%; 2022: 34.6%; 2021: 35.5%). As in 2024, however, most of the growth in 2025 was attributed to the annual results posted by ORF 1, which expanded its market share by seven tenths of a percentage point to 10.8%, pulling further ahead of the ten-per cent mark (2024: 10.1%; 2023: 9.5%; 2022: 9.8%; 2021: 10.2%). ORF 2 posted a market share of 20.8% in 2025. Although this result was inside the margin of fluctuation (2024: 20.9%; 2023: 21.0%; 2022: 21.4%; 2021: 22.1%), the channel nonetheless kept to its downward path. ORF III took a 2.6% market share. Although largely static year on year, this too constitutes a slight negative trend from a multi-year perspective (2024: 2.7%; 2023: 2.8%; 2022: 2.9%; 2021: 2.8%). ORF SPORT+ recorded a market share of 0.4% in 2025, which was once again within the narrow 0.4% to 0.5% range observed for this channel over the last few years (2024: 0.5%; 2023: 0.4%; 2022: 0.4%; 2021: 0.5%).

#### 10.1.2.4 Market shares of German television channels

Considered together, German private and public broadcasters took a 40.6% share of the Austrian television market in 2025. Of this overall share, German private channels accounted for 26.3% while 14.3% was attributed to public channels from Germany.

German private channels viewed in Austria gained six tenths of a percentage point of market share in 2025. This result reversed the surprising loss experienced in 2024, when market share dropped around 1 percentage point to 25.7% and thus to the lowest figure ever recorded in Austria for German private broadcasters. With the new market share posted in 2025, the German private broadcasters have returned to the long-term average maintained since 2021. This figure has not been achieved by major gains or losses on the part of individual

channels but is instead the collective result of minimal fluctuations of no more than two tenths of a percentage point in a positive or negative direction.

Generally speaking, over the past few years market shares for all German private channels—and especially for smaller and special-interest channels—have been volatile but only in terms of fractional percentage values. Already beginning in 2022, these changes were observed to no longer involve gains and losses within a range of up to six tenths of a percentage point but to span a maximum of three tenths of a percentage point and mostly not more than one or two tenths.

That said, the most significant gains among German private broadcasters in 2025 were made by the channels RTL and VOX, who increased their share by two tenths of a percentage point each and further consolidated their lead over the other German private broadcasters. At the other end of the scale were SUPER RTL and ntv, who each lost two tenths of a percentage point and saw their market shares shrink yet further.

With the sole exception of 2023, when VOX briefly took over the lead, RTL has been market leader among private broadcasters since 2022, taking a share of 3.7% in 2025 (2024: 3.5%; 2023: 3.3%; 2022: 3.0%; 2021: 3.1%; 2020: 3.7%). VOX remained in second place in 2025, at a market share of 3.6% (2024: 3.4%; 2023: 3.5%; 2022: 3.5%; 2021: 3.2%; 2020: 3.4%). Following at some distance were Sat.1 and PRO 7, who both acquired a single tenth of a percentage point but again shared a joint third place. Sat.1 closed the year with a market share of 2.3% (2024: 2.2%; 2023: 2.6%; 2022: 2.6%; 2021: 2.7%; 2020: 3.0%) and therefore the same share as posted by ProSieben, which shed two tenths of a percentage point to land at 2.2% (2023: 2.4%; 2022: 2.4%; 2021: 2.7%; 2020: 3.2%). The fourth spot was taken by RTL's spin-off channel RTL up, which posted an unchanged market share of 2.1% (2024: 2.1%; 2023: 1.9%; 2022: 1.6%; 2021: 1.5%).

In the group of German private broadcasters with a market share of less than 2%, Sat.1 Gold once again led the pack in 2025 with a 1.9% share—a figure that was also unchanged from the previous year (2024: 1.9%; 2023: 1.8%, 2022/2021: 1.7%; 2020: 1.8%). Second-placed Kabel 1 posted 1.8% for the third year running (2024/2023: 1.8%; 2022: 1.7%; 2021: 1.8%; 2020: 2.2%), with third place going to RTL 2, which had fallen by an above-average three tenths of a percentage point in 2024 and shed another tenth of a percentage point for a 1.5% share in 2025 (2024: 1.6%; 2023: 1.9%; 2022/2021/2020: 1.8%). While NITRO was last-placed among channels with at least one per cent of market share, its 1.2% share was unchanged year on year (2024: 1.2%; 2020 to 2023: 1.4%).

In 2025, SUPER RTL again joined the group of German private broadcasters with less than one per cent of market share. Shedding two tenths of a percentage point, the channel slipped to a 0.8% market share and thus fell behind Kabel 1 DOKU, which retained its 2024 share of 0.9%. SUPER RTL had otherwise posted a consistent 1.0% market share ever since 2020. Constancy was also ntv's watchword, as its market share had previously oscillated between 0.6% and 0.7%. In 2025, however, the channel lost two tenths of a percentage point year on year and saw its share shrink all the way to 0.5%.

Other German private channels achieving less than one per cent of market share in 2025 included sixx (0.7%), DMAX (0.7%), Sport 1 (0.6%), ProSieben Maxx (0.6%), TLC (0.4%), Comedy Central (0.2%) and Nickelodeon (0.1%).

Taken together, German public channels accounted for 14.3%—and thus around a third—of the total market share of German television channels in Austria. Despite slipping a single tenth of a percentage point to record a market share of 4.5% in 2025 (2024/2023: 4.6%; 2022: 4.1%; 2021/2020: 3.9%; 2019: 4.2%), ZDF not only retained its title as the most successful German public broadcasting channel in Austria but was also once again the country's most successful German channel overall. ZDF has held this distinction since 2018, when it first took the crown from private channel RTL, then the most successful German channel on the Austrian market. Until 2023, ZDF was also the third most popular channel in Austria after ORF 2 and ORF 1, until it was forced into fourth place by ServusTV in 2024. Yet with a market share of just 4.7%, ServusTV now has only a slim lead over its German rival.

Although the overall market share for public channels from Germany declined slightly in 2025, it remained within the usual margin of fluctuation when considered over a multi-year timeline. ARD (3.1% market share) and ZDFneo (1.8%) each lost a single tenth of a percentage point on year. The ARD regional channels (3.6% joint market share) and 3sat each lost two tenths of a percentage point in 2025 when compared with the previous year. Considered together, German public channels shed three tenths of a percentage point year on year and therefore took an overall market share of 14.3% in 2025 (2024: 14.6%; 2023: 14.8%; 2022: 14.1%; 2021: 13.9%; 2020: 14.4%; 2019: 15%).

As a group, the collective market share for non-Austrian channels in 2025 was 52.3% and thus the same as in 2024 (2023: 53.5%; 2022: 52.5%; 2021: 51.8%; 2020: 54.9%). Besides the channels from Germany mentioned above, this group includes other German-language channels such as those broadcast by Swiss public television, as well as shopping channels and channels broadcast in other languages.

### 10.1.2.5 2025 Video Survey: ratio of broadcast to online content viewed

In 2025, the combined video viewing time for linear television and streaming services rose slightly after three years of decline, gaining two minutes for the sum total of 225 minutes per capita per day in the Austrian population aged 14 and over (2024: 223 minutes; 2023: 246 minutes; 2022: 261 minutes; 2021: 281 minutes; 2020: 248 minutes). The year-on-year decline had been 23 minutes in 2024 and 15 minutes in 2023. Accordingly, video viewing time in 2025 was six minutes higher than the figure for the pre-pandemic year of 2019, with an average viewing time of 219 minutes per day.

This section presents the findings of the 2025 Video Survey, which has been commissioned annually since 2016 by the Media Division at RTR and the Teletest Working Group (AGTT) at GfK Austria. This opinion research institute used computer-assisted web interviews (CAWI) to survey, as previously in February, 4,000 respondents as a representative sample of the Austrian population aged 14 and over, to find out what video content they had viewed 'yesterday'.

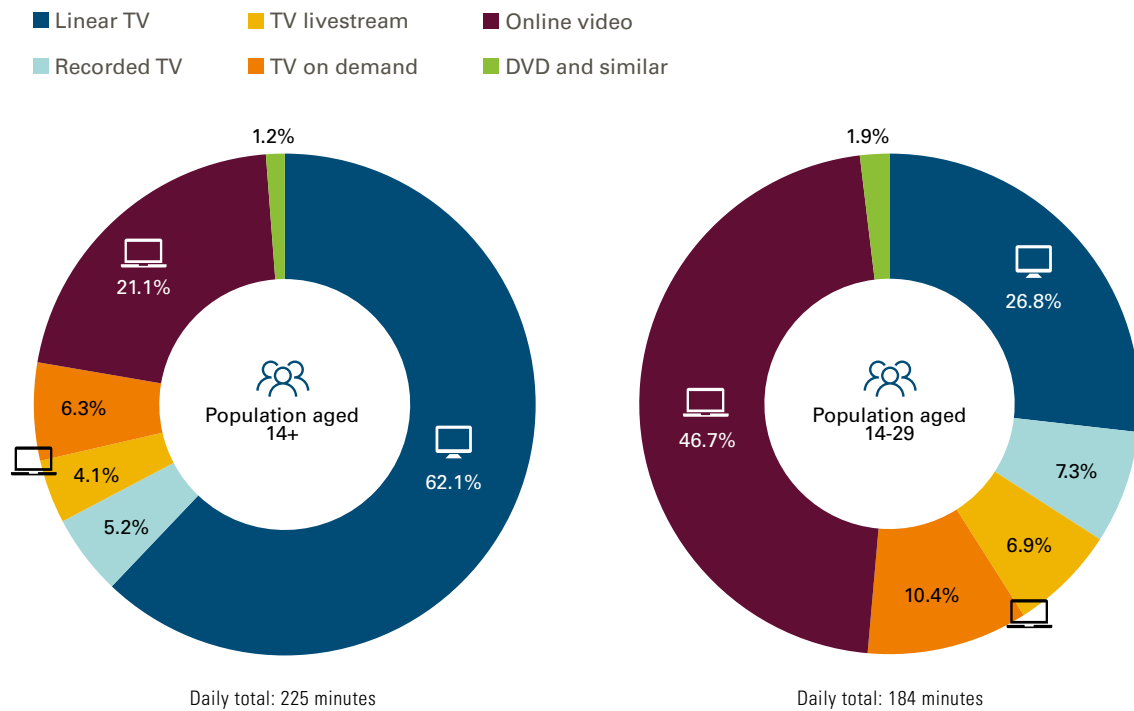
The Video Survey presents the use of all video services, from linear television and broadcaster media libraries to alternative online services, and includes video consumption in social media, both among the population as a whole and within many specific subgroups. The 2025 Video Survey is available in its entirety on the RTR website at [www.rtr.at/Bewegtbildstudie2025](http://www.rtr.at/Bewegtbildstudie2025) (in German).

The data from the 2025 survey seem to indicate that both video viewing time per se and its distribution between content provided by conventional television and by streaming services are now stabilising in the post-pandemic era. Conventional television broadcasters have successfully used media libraries and non-live television services to compensate for slight losses in the consumption of linear broadcasts. A modest trend towards on-demand television viewing continues to be seen. In a comparison of figures from 2025 and 2024 for the general population aged 14 or over, no significant shifts were observed either for the various television formats overall—i.e. linear broadcasting plus live broadcasts—or for alternative video formats as a whole. In the age group aged 14 to 29, however, the increased consumption of livestream television and on-demand television has fuelled a slight increase in daily reach for broadcasters in this age category.

When considering the proportions of viewing time spent on linear television versus online services, the—at times rapid—uptake of video content supplied by online video platforms seen from 2016 onwards has just as clearly slowed since 2022. Traditional linear scheduled television easily remained the most popular of all video sources in 2025 in the general population aged 14 and over, with a viewing time share of 62.1%. Even so, this figure marks a decline of 2 percentage points year on year. This format's losses benefited livestream broadcasts, which rose by 1 percentage point to 4.1%, and on-demand viewing (of content from a broadcaster's media library), which gained 1.6 percentage points for a 6.3% share. At 5.2% (2024: 5.1%), virtually no change was seen in the share of viewing time taken by the time-shifted viewing of television content, using recorders or corresponding services from cable television providers.

Given the slight rise in viewing time for television services using the on-demand, livestream or time-shifted formats, the average viewing time for linear live television in the general population aged 14 and over slipped 3 minutes to 140 minutes per capita per day (2024: 143 minutes; 2023: 157 minutes; 2022: 170 minutes; 2021: 194 minutes).

**Figure 50: Daily viewing of video broadcasts and online video in 2025, individuals aged 14+ and 14 to 29-year-olds**



Source: RTR/AGTT 2025 Video Survey; shares as percentages; all of Austria

Time-shifted TV, such as 'home-made' TV recordings using a hard disk recorder, or from platforms offered by cable television providers, television usage took a total share of 67.3% (2024: 69.2%; 2023: 69.4%; 2022: 70%; 2021: 73.4%) or 152 minutes (2024: 154; 2023: 171; 2022: 183; 2021: 206) of average daily video viewing time. The viewing of broadcasts as a live stream (9 minutes) and as on-demand television (14 minutes) rose year on year by 6 minutes to 23 minutes (2024: 17 minutes; 2023: 18 minutes; 2022: 19 minutes; 2020: 15 minutes). This is the most significant increase for these two viewing formats since the Video Survey was launched.

Video consumption from purely online sources such as Netflix, Amazon Prime Video or YouTube, as well as video on social media such as Facebook, TikTok, Instagram and WhatsApp, contributed 21.1% or 47 minutes (2024: 21.4% or 48 minutes; 2023: 21.1% or 52 minutes; 2022: 20.8% or 54 minutes; 2021: 18.5% or 52 minutes) towards average video viewing time per day by the general population in 2025. Including TV livestreams and access to television programmes hosted by media libraries, in 2025 Austrians covered 31.5% of their daily video viewing needs online (2024: 29.2%; 2023: 28.7%; 2022: 28.1%; 2021: 25%). Online video viewing time rose by 5 minutes year on year to 70 minutes (2024: 65 minutes; 2023: 70 minutes; 2022: 73 minutes; 2021: 70 minutes). This is solely attributable to the roughly 6-minute rise in time for television broadcasts viewed as live streams and on-demand content. Viewing time for streaming services ticked down by one minute to 47 minutes.

### **No change overall in video viewing time for young people in 2025**

Despite the downward trend seen in previous years, the daily consumption of video among young people in the 14 to 29 age group remained practically unchanged year on year in 2025. Even so, the daily viewing time of 184 minutes for this young audience is 45 minutes lower than even the figure for 2023 (2023: 229 minutes; 2022: 232 minutes; 2021: 250 minutes).

The share of viewing time for conventional television reception—via antenna, cable or satellite—shrank by almost 1 percentage point year on year to 26.8% (2024: 27.9%; 2023: 25.9%; 2022: 30.5%; 2021: 31.9%). In absolute terms, viewing time fell three minutes to 49 minutes per day (2024: 52 minutes; 2023: 59 minutes; 2022: 71 minutes; 2021: 80 minutes). In 2024, viewing time for linear television broadcasts recorded to user devices or accessed on video platforms operated by cable network operators (time-shifted television) had experienced a sharp decline. In 2025, however, this format recovered strongly, rising to a 7.3% share of daily viewing time in this young age group and its highest value since 2016 (2024: 3.6%; 2023: 6%; 2022: 4.2%; 2021: 4.3%). As a result, television usage in this young audience reversed its downward trend and took a 34.4% share of daily viewing time (2024: 31.5%; 2023: 31.9%; 2022: 34.7%; 2021: 36.3%).

The online format of livestream television also gained ground among young people, although its usage share of 6.9% remained well below the record figure attained in 2023 (2024: 3.9%; 2023: 8%; 2022: 5.2%; 2021: 4.8%). For on-demand television, the share of daily video viewing time among 14 to 29-year-olds in 2025 not only followed but even accelerated the long-term upward trend, rising an above-average 3 percentage points to 10.4%, the highest figure to date (2024: 7.4%; 2023: 6.9%; 2022: 6.9%; 2021: 7.3%).

### **Television content sees comeback among young people**

The analysis above shows how in 2025, for the first again after five years, television content accounted for a larger proportion of young people's video viewing time than video content from alternative providers and services. This was true of TV content whether viewed online or in broadcast formats. Considered together, linear and online television content took a 51.4% share of average daily viewing time among the young target audience. This figure, a record since 2019, represents a year-on-year rise of 8.5 percentage points (2024: 42.9%; 2023: 46.9%; 2022: 46.8%; 2021: 48.3%; 2020: 49.7%; 2019: 60.2%). In stark contrast, the use of alternative video services in the 14 to 29-year-old age group from streaming platforms operated by other providers as downloads or via social media dropped by 7 percentage points in 2025 to 46.7% (2024: 53.7%; 2023: 48.9%; 2022: 49%; 2021: 48%).

This loss meant in fact the first slight fall in overall online video use among young people for several years. As a proportion of daily video viewing time, video consumption from all online sources combined—i.e. live streams and broadcaster media libraries, streaming services such as Netflix, Amazon Prime Video and YouTube, and video usage on social media platforms including Facebook, TikTok, Instagram and WhatsApp—accounted in 2025 for 64% of daily video viewing in the 14 to 29-year-old age group (2024: 65%; 2023: 64%; 2022: 61.1%; 2021: 60.1%; 2020: 59%). Still, this change is well within the margin of fluctuation and can hardly be seen as bucking the trend.

When video consumption for young people is broken down by technical format, i.e. broadcasts or online (the latter including television live streams and on-demand television), 14 to 29-year-olds used online services to cover almost two thirds of their average daily video consumption needs in 2025 (64%) with 34% covered by live television or corresponding recordings (time-shifted television). DVDs still account for almost 2% of daily video consumption among young people.

### 2025 online video service rankings: share of overall video viewing time

On-demand television (all television broadcaster media libraries considered as a whole) continued on its growth trajectory in 2025. Overall, it significantly widened its lead over YouTube and Netflix in online service rankings to take a 6.3% share of average daily video viewing time among the general population aged 14 and over (2024: 4.7%; 2023: 3.8%; 2022: 4.3%; 2021: 3.6%). YouTube rose to second place, improving its ranking by just over a percentage point to 5.5% (2024: 4.4%; 2023: 4.3%; 2022: 4.6%; 2021: 3.9%). Television broadcaster live streams moved up one place from fourth to third in 2025, with a 4.1% share (2024: 3.1%; 2023: 3.8%; 2022: 3.0%; 2021: 2.7%).

With just a 3.9% share of overall video viewing time—and thus its lowest figure for the last five years—Netflix slipped down two spots in 2025 to take fourth place (2024: 4.5%; 2023: 4.1%; 2022: 4.6%). Amazon Prime Video achieved a modest reversal of its long-standing downward trend to finish 2025 in fifth place with 2.1% (2024: 2.0%; 2023: 2.1%; 2022: 2.3%).

Other online video services followed at some distance, led by Instagram at 0.9% (2024: 1.3%; 2023: 0.9%; 2022: 1%). Disney+ fell back to 0.7% in 2025 (2024: 1.0%; 2023: 1.3%; 2022: 0.7%). Losses were also experienced by Twitch with 0.7% (2024: 1%; 2023: 0.8%; 2022: 0.7%) and TikTok, also with 0.7% (2024: 0.9%; 2023: 0.7%; 2022: 0.7%). Bucking this trend were WhatsApp, which improved its share of average daily video viewing time to 0.6% (2024: 0.4%; 2023: 0.5%; 2022: 0.6%), and Facebook, which also finished 2025 at 0.6% (2024: 0.4%; 2023: 0.6%; 2022: 0.6%). Other online video offerings reached a total average of 5.3% of daily video viewing time among the overall population aged 14 and above (2024: 5.5%; 2023: 5.8%; 2022: 5.1%).

### 2025 online video service rankings among 14 to 29-year-olds

Among young people in the 14 to 29 age group, YouTube once again made significant gains in 2025, ultimately taking a 13.2% share of the average per capita daily video viewing time. This means YouTube considerably widened the lead over other online services maintained since 2022, almost drawing level with its figure from that year (2024: 11.5%; 2023: 11.5%; 2022: 13.4%). Yet the standout result for 2025 is the 10.4% share of video usage for on-demand television (broadcaster media libraries considered as a whole), a 3-percentage-point increase year on year (2024: 7.4%; 2023: 6.9%; 2022: 6.9%), to take the second spot from Netflix. For its part, Netflix shed most of its gains from 2024 and fell back to an 8.3% share in 2025 (2024: 10.6%; 2023: 8.1%; 2022: 11%). At the same time, livestream television was able to regain much of the ground lost in 2024, achieving a 6.9% share in 2025 (2024: 3.9%; 2023: 8%; 2022: 5.2%; 2021: 4.8%) to snatch the fourth spot from Instagram. Despite losses, TikTok took fifth place in the 2025 online rankings among 14 to 29-year-olds, with a 3.7% share (2024: 4.3%; 2023: 3.0%; 2022: 2.8%; 2021: 1.7%). The sixth spot went to Instagram, which shed more than 2 percentage points for a 3.3% share (2024: 5.6%; 2023: 2.8%; 2022: 3.7%; 2021: 3.3%) that saw it slide two places in the rankings.

Consolidating its gains from the previous year—and benefitting significantly from losses suffered by competitors—Disney+ achieved a 2025 figure of 2.5% (2024/2023: 2.3%; 2022: 1.7%) that placed it first among online video services achieving less than a 3% share in the 14 to 29 age group. Amazon Prime Video saw its share shrink for the second year in a row and fell to 1.9% (2024: 2.2%; 2023: 3.6%; 2022: 1.5%). Although Twitch had led the field among services with less than a 3% share of viewing time among young people in 2024, it lost heavily in 2025, achieving a mere 1.3% (2024: 2.9%; 2023: 2.6%; 2022: 2.3%). Hard on its heels were Facebook with 1.2% (previous years: n. a.) and WhatsApp with 0.9% (2024: n. a.; 2023: 1.5%; 2022: 1.5%; 2021: 1.6%); both platforms had only made the 'other' category in 2024. That category was the fate of Snapchat in 2025 (2024: 1.7%; 2023: 1.2%), as it was for film and video downloads from various services (2024: 1.7%), which now appear to be wholly supplanted by streaming. While the other online video services category continues to offer plenty of variety, it lost ground again, falling to 10.4% (2024: 11.0%; 2023: 12.2%; 2022: 10%).

## 10.1.3 The Austrian radio market

### 10.1.3.1 Nationwide listening figures in 2025

For all of Austria's FM and DAB+ radio stations, the results for 2025 typically show minimal losses in daily reach and a slight decline in listening time among the general population in Austria aged ten and over (10+).<sup>52</sup> Within the core target group of 14 to 49-year-olds, listening time dropped more sharply than in the overall population.

Following gains in 2023, daily reach for radio stations as a whole as well as listening time saw moderate losses in 2024, not only among the general population in Austria aged ten and over (10+) but also within the core target group of 14 to 49-year-olds.

These insights on radio listening in Austria, together with all other results presented below, are sourced from Radiotest, a representative reach study for radio usage in the Austrian population aged ten and over. Radiotest uses a mixed-method format for the interviews conducted in its target group of 14 to 69-year-olds: one in five interviews is organised as an online interview (CAWI), with the remainder completed as voice call interviews (CATI). The total sample size (10+) is just under 24,000 interviews.

Radiotest is commissioned by the ORF and Austria's private stations. Survey work was completed by two fieldwork agencies in 2025: GfK Austria (CATI) and Reppublika (CAWI). Fieldwork, weighting and the final analysis is monitored by the ISBA.

In 2025, the daily reach for radio remained unchanged year on year. Survey figures show that, on average, 74.7% of the 10+ Austrian population listened to the radio "for at least 15 minutes yesterday"<sup>53</sup> in 2025 (2024: 75%; 2023: 76%; 2022: 74.9%).

In the core target group of 14 to 49-year-olds, daily reach for radio remained stable at 71.6% in 2025 (2024: 71.7%; 2023: 73.4%; 2022: 71.7%).

Listening time among the overall population (10+) fell by 4 minutes to 195 minutes (2024: 199 minutes; 2023: 202 minutes; 2022: 187 minutes).

In the core target group of 14 to 49-year-olds, average listening time fell more significantly to 194 minutes per day, a drop of 7 minutes. Between 2022 and 2024, there was a sharp rise in listening time by a total of 24 minutes to 201 minutes, which decisively bucked the long-observed downward decline among the target group relevant for advertising (2024: 201 minutes; 2023: 200 minutes; 2022: 177 minutes; 2021: 166 minutes).

#### **Austria-wide market shares and daily reach for ORF and private radio**

Daily reach of a radio station represents the percentage of people within a target age group who report having tuned into that station the day before and listened for at least 15 minutes. When for example a listener tunes into three stations for at least 15 minutes each, this listener positively impacts daily reach equally for all three stations, even though she perhaps listened to two of the stations for only 15 minutes each but to the third for a longer period.

This contrasts with market share, which tells us how many of the average radio minutes listened to each day can be allocated to the respective radio stations. More time spent listening to a given radio station translates into a greater market share, thus increasing the value of the station's airtime for advertisers.

<sup>52</sup> Based on radio use from Monday to Sunday

<sup>53</sup> Definition of daily reach in the context of radio

Radiotest determines market share based on a survey of respondents' activities on each previous day. The day is divided up into quarter-hour periods, with listeners allowed to list up to three radio stations for each quarter of an hour. This, as well as rounding, can lead to overlapping results for the various radio stations, so that the total market share held by radio stations may turn out to be greater than the adjusted (net) figure for all stations in total, for example, for the ORF channel portfolio as a whole or private stations in total. This effect was observed again in 2025. Among listeners aged 14 to 49, the market shares held by ORF, national private radio broadcasters and other radio broadcasters (such as foreign broadcasters) actually add up to 105%, even though these shares should total 100%.

The following figures concentrate on the 14 to 49-year-old core target group, especially key for marketing. Here, mean listening time is calculated for an entire week, that is, from Monday to Sunday.

### **Daily reach shrinks again for ORF radio stations, private stations gain ground once more**

In 2025, the ORF radio network took 45.8% of daily reach in the target group of 14 to 49-year-olds. This was only marginally lower than the previous year's figure and continued the recent series of losses (2024: 46.1%; 2023: 48.2%; 2022 and 2021: 48.9%; 2020: 51.2%).

In 2025, private radio stations enjoyed an increase in daily reach by eight tenths of a percentage point to 46.5%. This figure had climbed by 1 percentage point in 2024 and by roughly 6 percentage points in 2023. Private radio stations have been experiencing a consistently positive trajectory ever since, although the curve is now flattening (2024: 45.7%; 2023: 44.7%; 2022: 39%; 2021: 36%).

Among individual ORF stations, there were both losses as well as a few gains within the range of a single percentage point.

In 2025, the Ö1 radio network remained relatively stable and above the 5% threshold; with a daily reach of 5.1% in the target group of 14 to 49-year-olds (2024: 5.2%; 2023: 5.0%; 2022: 5.5%).

Ö3 did not increase listener numbers in 2025 to any great extent, so that daily reach rose only marginally by 0.4 percentage points to 33% (2024: 32.6%; 2023: 34.7%; 2022: 35.5%).

Compared with 2024, the combined daily reach of the ORF regional stations remained stable nationwide among the target group of 14 to 49-year-olds and easily within the margin of fluctuation at 13.6% (2024: 13.8%; 2023: 13.8%; 2022: 13.5%). However, the 2025 result is still significantly short of the last record figure of 15.7% recorded by the ORF regional stations in 2019. In 2025, the ORF regional stations with the highest reach figures (each in their core broadcasting regions) were Radio Kärnten (15.3%/-1.9 percentage points) and Radio Vorarlberg (20.4%/+2.7 percentage points). The stations with the smallest reach were Radio Niederösterreich (8.6%, a loss of 0.3 percentage points) and Radio Wien (6.7%, a loss of 0.3 percentage points).

With a 5.4% daily reach, FM4 also remained within its margin of fluctuation from the previous year (2024: 5.6%; 2023: 5.5%; 2022: 5.2%).

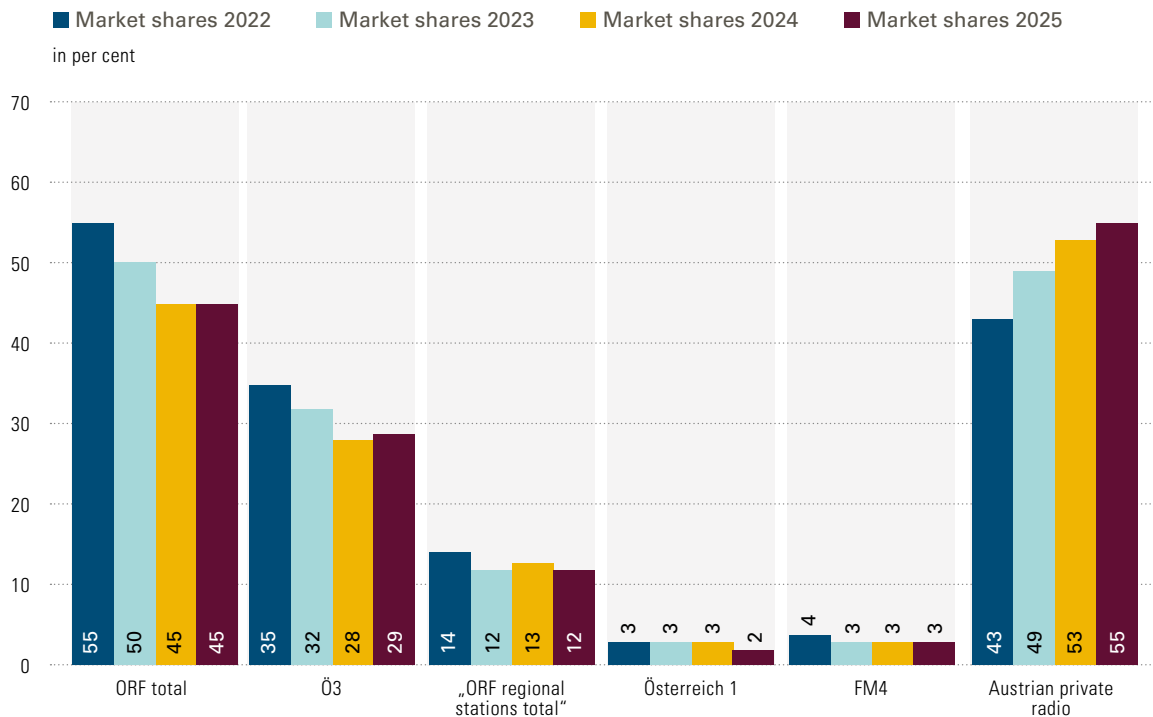
### **ORF market share remains stable in 2025, private stations set new record**

The market share for ORF stations nationwide remained stable in 2025 at 45% in the 14 to 49-year-old listener group (2024: 45%; 2023: 50%; 2022: 55%; 2021: 60%; 2020: 63%). Still, considering the additional losses from 2019 to 2021, in the space of seven years the ORF radio network has surrendered a market share of 20 percentage points among the most relevant target group for advertisers.

After experiencing continuous losses in the past, the Ö3 station gained 1 percentage point from the previous year to achieve a market share of 29% in 2025 (2024: 28%; 2023: 32%; 2022: 35%).

The nine ORF regional stations reached a total of 12% of the market share in 2025; this equates to a loss of 1 percentage point. While within the margin of fluctuation from the previous year (2024: 13%; 2023: 12%; 2022: 14%), a downward trend can clearly be seen here. In 2025, FM4 and Ö1, with 3% and 2% respectively, showed a relatively stable market share compared with 2024, also remaining within the margin of fluctuation from previous years.

**Figure 51: Shares of the nationwide radio market held by ORF and private stations among the 14–49 target group, 2022–2025**



Source: Radiotest 2025\_4; percentages; all of Austria.

The market share collectively held by private stations in the provinces, the national commercial stations kronehit, oe24 (formerly Radio Austria) and “88.6 – so rockt das Leben”, as well as the DAB+ digital radio stations rose by 2 percentage points in 2025 to reach 55%, and thus another record market share. Private radio stations thus continue to top the growth seen in the past five years. Only in 2021 had the private stations improved on the 36% market share they had held since 2015 (with the exception of 2018: 37%), gaining 2 percentage points to achieve a record market share of 38% in the core target group of 14 to 49-year-olds. Private stations had netted market share gains of 5 percentage points to achieve 43% already in 2022, increasing by a further 6 percentage points to a 49% share of the market in 2023, only to make another four-percentage-point jump to cross the 50% threshold in 2024.

The collective increase in national market share for private radio stations in 2024 is in total accounted for by maximum 1-percentage-point wins and losses among several stations. Some of the stations are also or exclusively broadcast via DAB+.

The market shares of private stations are rounded up to whole percentages for 2025 as follows: “88.6 – so rockt das Leben” gained 1 percentage point to 12% (FM and DAB+, nationwide since 2025, 61% technical population reach), kronehit lost 1 percentage point to 12%, and Radio Energy gained 1 percentage point nationwide in 2025 to achieve a 3% market share (DAB+ nationwide and FM Vienna/Salzburg). Rock Antenne Österreich remained unchanged at a 2% market share (FM Vienna and DAB+ nationwide), Antenne Österreich also remained unchanged at a 1% market share (DAB+ nationwide), as did Klassik Radio with a

1% market share (DAB+ nationwide and FM in Salzburg until November 2025), and Superfly also held 1% of market share (DAB+ nationwide and FM Vienna). Also posting a 1% market share were: oe24 (broadcast throughout Austria via FM and DAB+), Radio U1 Tirol (FM Tyrol and DAB+ Upper Austria, Salzburg, Tyrol), and Antenne Vorarlberg (DAB+ Vorarlberg and FM Vorarlberg), which also saw its share drop to 24% from 28% in Vorarlberg.

Arabella MAGIC (DAB+ nationwide) and Soundportal (DAB+ Styria and Carinthia, FM Styria) both lost 1 percentage point to achieve a 0% market share, while jö.live national (DAB+ nationwide) retained its (nominal) 0% share.

By province, kronehit reached a market share of 18% in Vienna, 17% in Lower Austria, 15% in Upper Austria, and between 10 and 15% in the other provinces..

### 10.1.3.2 Radio listening in Vienna in 2025

While daily reach for radio stations in Vienna experienced moderate losses in 2025, not only among the general population aged ten and over but also in the core target group of 14 to 49-year-olds, average listening time fell significantly among both of these age groups.

The Vienna target group aged 10 and above listened to an average of 149 minutes of radio per day in 2025. This equates to 14 minutes less than in 2024. The decline was nonetheless much more pronounced among the Vienna target group of 14 to 49-year-olds in 2025, who listened to radio an average of just 131 minutes daily. This equates to 29 minutes less than in 2024. Radio listening habits in the fiercely competitive Vienna radio market, with a total of 63 radio stations licensed in Austria (analogue as well as regional and national digital radio), strongly diverge from the nationwide trend. The average percentage daily reach for radio in the national capital tends to be significantly lower than for any other province, or indeed the national average. Daily listening time in Vienna is also traditionally much lower than the nationwide average. Nevertheless, 194 minutes of listening time nationwide among 14 to 49-year-olds compared with 131 minutes in Vienna is an unusual difference. In 2024, there was a discrepancy of 41 minutes (201 minutes nationwide listening time, 160 minutes in Vienna), with 63 minutes of listening time recorded in 2025.

In 2025, radio reached 63.3% of the total Viennese population (10+) on average daily. While daily reach for radio often fluctuates widely in Vienna, above-average growth of 3.5 percentage points to 66% was seen in 2023. Daily reach has since been on a downward trajectory (2024: 63.9%; 2023: 66%; 2022: 62.5%).

Among Viennese residents aged 14 to 49, radio achieved a daily reach of 56.6% in 2025. This corresponds to a loss of almost 2 percentage points compared with the previous year. Among this target group of younger listeners, above-average gains of just over 5 percentage points were secured in 2023 to achieve a new record reach level. In 2025, daily reach in the target group relevant for advertising dropped to values previously seen in 2022 (2024: 58.4%; 2023: 61.8%; 2022: 56.7%). This marks a potential return to the long-term decline previously observed for radio reach within this core target group.

#### Radio listening time in Vienna sees a sharp decline again in 2025

In 2025, average daily listening time amounted to 149 minutes per capita and day in the overall population aged ten and over, a decline of 14 minutes compared with the previous year. However, this marks a return to the values that were more typical prior to 2023, when for listening time an exceptional increase of 23 minutes was seen (2024: 163 minutes; 2023: 165 minutes; 2022: 142 minutes; 2021: 134 minutes; 2020: 152 minutes). At national level, listening time fell among the overall population 10+ by just 4 minutes to 195 minutes (2024: 199 minutes).

The decline in listening time was significantly more evident in the Viennese target group of 14 to 49-year-olds, each of whom listened to radio an average of just 131 minutes per day in 2025, a drop of 29 minutes (nationwide: 194 minutes). Still, to put these figures into proper perspective, we need to remember the exceptional increase in listening time of 41 minutes among this target group in 2023 (2024: 160 minutes; 2023:

158 minutes; 2022: 117 minutes; 2021: 101 minutes; 2020: 119 minutes). Thus, listening time of 131 minutes is still significantly higher than the values typical prior to 2023.

Listening time in Vienna was, as usual, well below the national average. In 2025, the general Viennese population 10+ listened to radio 46 minutes less than the country as a whole, and even 63 minutes less among the core target group.

### Market shares and daily reach among Vienna radio listeners aged 14–49

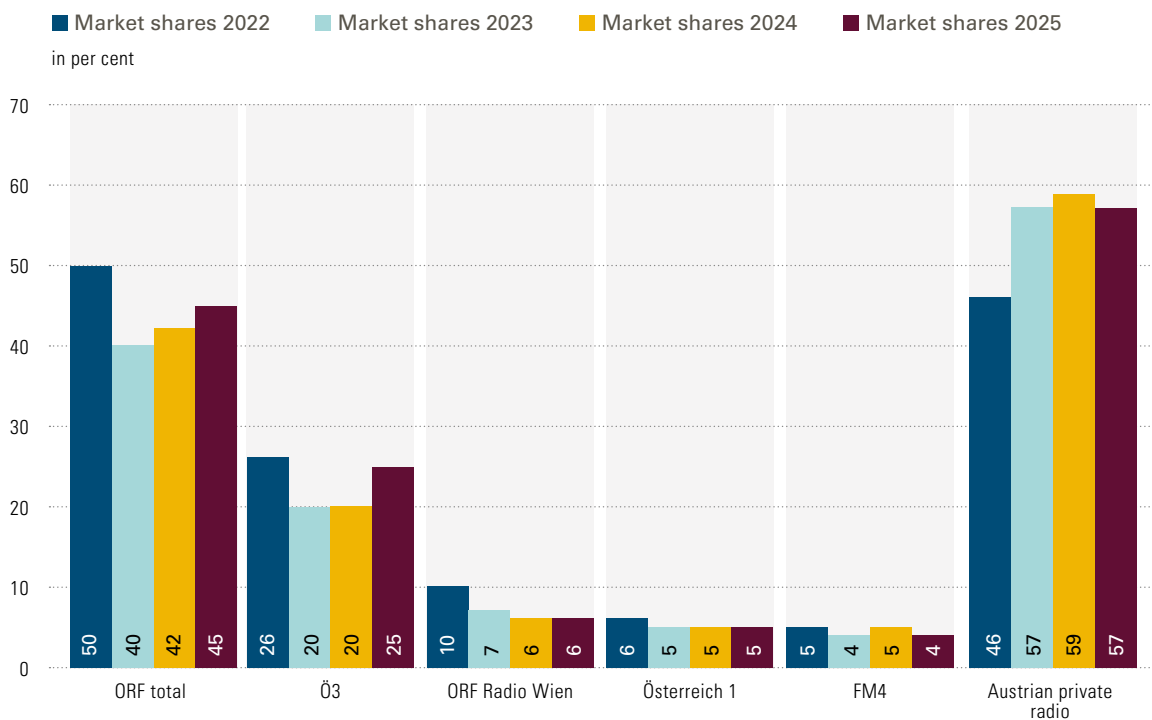
As in the nationwide analysis above, 14 to 49-year-old core target group highly relevant for marketing is the focus of the following information about the market success of radio stations in the Viennese market. In this case, mean listening time is calculated for an entire week, that is, from Monday to Sunday.

The ratio of total listening time to the time spent listening to the individual radio stations forms the basis for calculating the market shares for the individual stations. Total listening time corresponds to a 100% market share.

The Viennese radio market in 2025 showed a steady recovery for ORF stations paired with a slight loss in market share among private radio stations, the latter not seen for quite some time. ORF stations overall were able to gain three percentage points to achieve a 45% share of the Viennese market, whereas private stations collectively fell by 2 percentage points to reach a 57% share.

Among Viennese residents aged 14 to 49, ORF station Ö3 claimed the largest market share, that is, 25%, in 2025, followed by the private kronehit at 14%.

**Figure 52: Radio market shares in Vienna among the 14–49 target group, ORF vs. private stations, 2022–2025**



Source: Radiotest 2025\_4; percentages; Vienna market

## ORF Radio stations in Vienna in 2025

Following the dramatic 10-percentage-point loss of market share among Viennese listeners aged 14 to 49 in 2023, and after the recovery in 2024, the ORF radio network was able again in 2025 to gain shares, improving by 3 percentage points to 45% (2024: 42%; 2023: 40%; 2022: 50%).

This contrasts with daily reach for the ORF radio stations in Vienna, which slipped by almost 3 percentage points to 33.9% in 2025 (2024: 36.6%; 2023: 36%; 2022: 35.8%).

Ö3 had lost 6 percentage points of market share to fall to a 20% market share in 2023, the major factor in the ORF network's collective loss of share in Vienna back then. Yet in 2024 Ö3 defended its market share, even increasing it again significantly to 25% in 2025 (2024: 20%; 2023: 20%; 2022: 26%).

Regional ORF radio station Radio Wien, which in 2023 also played a significant role in the overall loss of ORF market share, has shown no signs of recovery since then. While Radio Wien had maintained a stable 10% market share until 2022, it gave up 3 percentage points in 2023 to end at a 7% share, relinquishing another percentage point in 2024 for the 6% share Radio Wien hung onto in 2025.

Ö1 retained its market share of 5% in 2025 (2024: 5%; 2023: 5%; 2022: 6%), while FM4 lost 1 percentage point in the core target group to reach 4% (2024: 5%; 2023: 4%; 2022: 5%). Radio Niederösterreich remained stable year on year with a share of 3% in Vienna.

ORF radio stations in Vienna collectively saw their daily reach fall compared with the previous year. Among 14 to 49-year-old listeners, Ö3 lost just over 1 percentage point for 19.7% of daily reach, thus falling back to roughly the same level as in 2023 (2024: 20.8%; 2023: 19.5%; 2022: 20.7%) and remaining within the familiar margin of fluctuation.

A similar trend was observed for FM4 in 2025. The station also lost 1.1 percentage point among the core target group to achieve daily reach of 5.5% (2024: 6.6%; 2023: 5.4%; 2022: 4.8%), thereby falling within the range seen in 2023.

In 2025, Ö1 achieved 7.0% daily reach (2024: 7.4%; 2023: 7.4%; 2022: 7.7%). Radio Wien lost just three tenths of a percentage point for 6.7% (2024: 7.0%; 2023/2022: 6.7%; 2021: 5.9%), returning to the values seen in 2022 and 2023.

Regional ORF stations listened to in Vienna (Radio Wien as well as other regional stations) shed 1.3 percentage points of total reach, slightly more than the normal margin of fluctuation, slipping to 9.9% (2024: 11.2%; 2023: 11.6%; 2022: 10%).

## Private stations in Vienna in 2025

Among the group of listeners aged 14 to 49—the target group relevant for advertising—the market share held overall by private stations in Vienna shrunk to 57% in 2025. This corresponds to the level back in 2023, after which a record value of 59% followed in 2024 (2023: 57%; 2022: 46%).

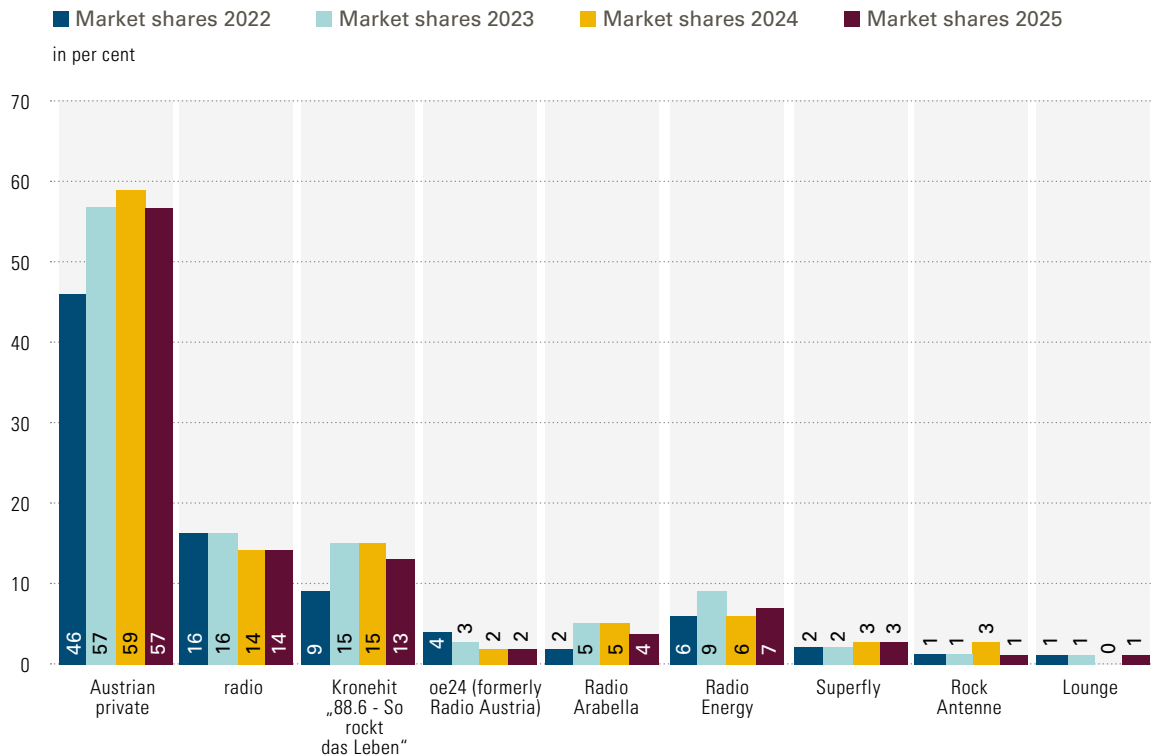
At 36.4%, daily reach for domestic private radio stations in Vienna remained virtually unchanged year on year (2024: 36.5%; 2023: 38.3%; 2022: 29.2%).

Kronehit held constant at 14% for Vienna in 2025 (2024: 14%; 2023/2022: 16%). "88.6 — so rockt das Leben", with its 15% market share, had toppled Kronehit from first place among Viennese private radio stations in 2024. In 2025, however, 88.6 lost two percentage points for only a 13% share among the 14 to 49-year-old listenership (2024: 15%; 2023: 15%; 2022: 9%), whereas Kronehit reconquered its crown to lead the market.

In terms of daily reach, kronehit made slight gains of 0.3 percentage points in 2025 to achieve a 15.7% share, still well below the peak value seen in 2023 (2024: 15.4%; 2023: 17.3%; 2022: 13.3%).

88.6 also expanded its daily reach in Vienna slightly by 0.4 percentage points to end 2025 at 10.7% (2024: 10.3%; 2023: 11.9%; 2022: 7.9%).

**Figure 53: Private radio shares in the Vienna market among the 14–49 target group, 2022–2025**



Source: Radiotest 2025\_4; percentages

Radio Arabella's market share in Vienna fell to 4% in 2025 (2024: 5%; 2023: 5%; 2022: 2%). Radio Energy was able to increase its market share by 1 percentage point to 7% in 2025 (2024: 6%; 2023: 9%; 2022: 6%).

With a daily reach of 5.2%, Radio Arabella's level in Vienna remained virtually unchanged from the previous year (2024: 5.3%; 2023: 4.2%; 2022: 3.2%). In 2025, Energy enjoyed gains of four tenths of a percentage point to achieve a daily reach of 8.8% (2024: 8.4%; 2023: 10.1%; 2022: 7.6%).

Rock Antenne saw its market share fall significantly in 2025, by 2 percentage points for a 1% share. Rock Antenne's daily reach also dropped to 1.9% (2024: 2.4%; 2023: 1.6%; 2022: 0.9%). Until late 2022, Rock Antenne had been a national station able to be heard in Vienna exclusively via DAB+, and was then also broadcast in the Austrian capital via FM from December 2022. While Rock Antenne did not yet benefit from the move in 2023, its market share in the capital did rise significantly by 2 percentage points to 3% in 2024.

Broadcast nationwide via FM and DAB+, oe24 (called Radio Austria until April 2024) had seen its share of the Vienna market improve to 4% by no fewer than 3 percentage points in 2022. In 2023 oe24 slipped back to 3% to then settle at a market share of 2% since 2024. oe24 also expanded its daily reach in Vienna significantly in 2025 to end at 3.4% (2024: 1.9%; 2023: 2.8%; 2022: 2.4%).

Superfly held onto its 3% market share in 2025 (2024: 3%; 2023/2022: 2%). Lounge, also available over FM and DAB+ in Vienna, lost one percentage point and fell to a 1% market share on 2025.

Other private radio stations in Vienna broadcast via digital DAB+ terrestrial radio achieved market shares of as much as 1% in 2025.

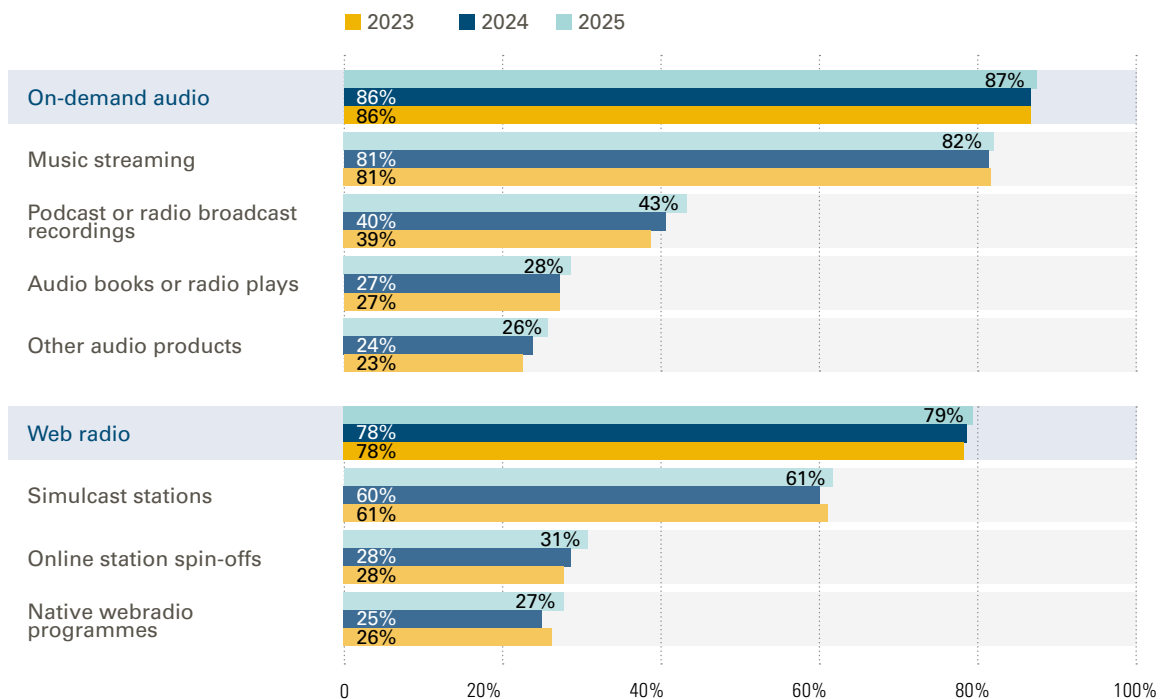
In total, the stations transmitting solely via DAB+ in Vienna ended the year with a 5% market share.

### 10.1.3.3 Online audio usage in 2025 (Online Audio Monitor Austria)

In late 2023, the RTR’s Media Division introduced a new market study, Online Audio Monitor Austria, thereby acknowledging the increasing importance of the use of online audio services among the population. This study is commissioned from Ipsos by the Media Division. For the study, the market research institute conducted an online survey of 4,000 persons aged 15 and over in May and June 2025. This sample was representative of 95% of Austrians with internet access (Statistics Austria 2024).

As in the previous year, around 91% of Austrian citizens aged 15 and over with internet access used online audio services such as web radio or on-demand audio content such as podcasts, audio books, radio plays, radio broadcast recordings and other forms of online audio ‘at least rarely’ in 2025. Some 80% used these services ‘at least monthly’ (2024: 81%), and 46% ‘daily’ or ‘almost daily’ (2024: 50%; 2023: 49%). Among online audio users, 87% listened to on-demand content, whereas 79% used web radios. The internet audio services seeing the greatest level of use among online audio users in 2025 were music streaming (82% of listeners) whereas linear web radio broadcasts remained virtually unchanged (79% of listeners).

Figure 54: Use of on-demand audio and web radio, online population 15+



Source: RTR Online Audio Monitor Austria 2025, percentages, multiple responses possible, online population

### Use of web radio in 2025

This means that linear radio broadcasts also rank among the most appealing online audio services, only slightly less popular than music streaming services such as YouTube, Spotify or Amazon Music. Among web radio users, 61% of respondents stated that they listen to simulcast broadcasts (2024: 60%), i.e. web radio stations that are also broadcast at the same time and with the same content for reception via FM and/or DAB+. In 2025, 31% of respondents listened to online offshoots, i.e. sites run by leading antenna-based radio stations that provide special-interest content (2024: 28%). Radio stations that are available exclusively online, and which cannot (unequivocally) be associated with broadcasting organisations from the linear DAB+ or FM segments, were used by 27% of web radio listeners (2024: 25%).

In most cases (49%), web radio users made use of the websites or apps provided by the operators of each web radio station (2024: 51%). These are followed at some distance by the station aggregation services Radio.at with 25% (2024: 24%), TuneIn with 12% (2024: 13%), Radioplayer.at with a strong increase to 9% (2024: 7%), myonlineradio.at with 6% (2024: 5%) and 'Others' with 4% (already in 2024; 2023: 6%).

### Use of on-demand audio in 2025

On-demand audio saw very little movement year on year in 2025. Audio services able to be heard at any time and according to personal interests were used by 87% of the online population (2024: 86%). Some 82% of online audio listeners aged 15 and over streamed music on demand from platforms such as YouTube, Spotify, Amazon, Apple Music and others (2024: 81%). Podcasts and on-demand radio broadcast recordings have enjoyed constant growth and were named by 43% of respondents in 2025 (2024: 40%; 2023: 39%). In 2025, 28% of online listeners used audio books or radio plays (2024: 27%).

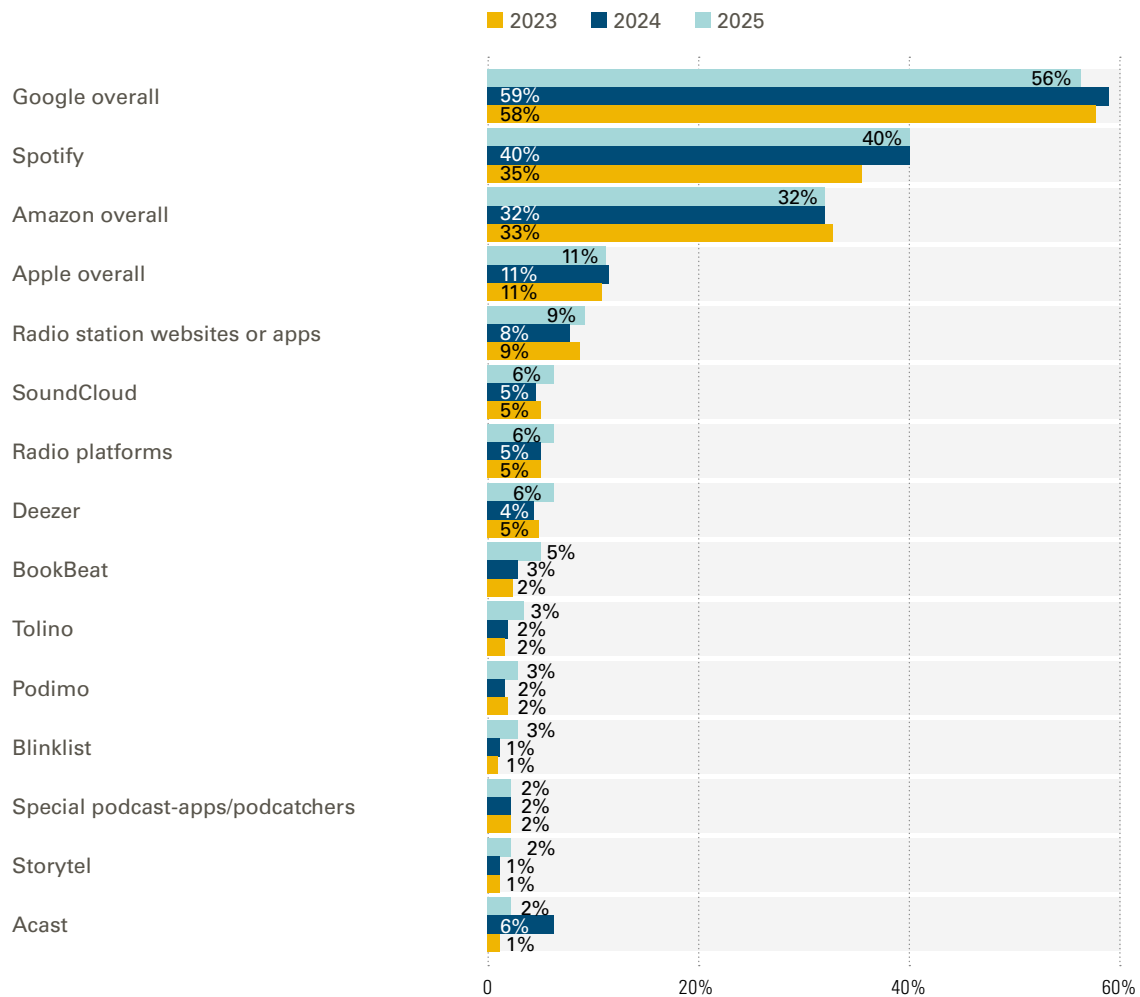
Among users of podcasts and radio broadcast recordings in 2025, the largest group of listeners was young people aged between 15 and 29, whose number also grew significantly. Such services were used by 67% of online audio users aged 15 to 29 (2024: 57%). The percentage of people listening to podcasts and on-demand radio programmes also rose significantly among the 30 to 49-year-olds to 50% (2024: 45%; 2023: 44%). For persons aged 50 and over, the figure remained virtually unchanged at 30% (2024: 31%).

Some 55% of the young group of listeners also stated in 2025 that podcasts and on-demand radio programmes were an 'important' or 'very important' source of information about news and current events (2024: 49%). This figure rose to 49% among 30 to 49-year-old listeners (2024: 45%) but increasing only slightly to 22% in the 50 and over age group (2024: 21%).

In 2025, the percentage of online audio users who listen to online audio books or radio plays increased significantly to 47% in the young target group of 15 to 29-year-olds (2024: 40%). Within the other age groups, any changes remained within the margin of fluctuation (30 to 49-year-olds: 37%; 2024: 36%; 2023: 38%; 50+: 15%; 2024: 17%; 2023: 16%).

Among on-demand platforms seeing the heaviest use, the service portfolio from Google was mentioned most frequently with 56% of responses (2024: 59%), while the 3-percentage-point decline against the previous year is predominantly due to the discontinuation of the Google Podcasts and Google Play Music service portfolio in 2024. 51% of responses referred to the Google platform YouTube (2024: 52%). Following the discontinuation of Google Podcasts and Google Play Music, YouTube Music had shown a considerable leap by 15 percentage points to reach 20% of responses in 2024 but was unable to make further gains in 2025. As in the previous year, Google Play Books received 3% of responses.

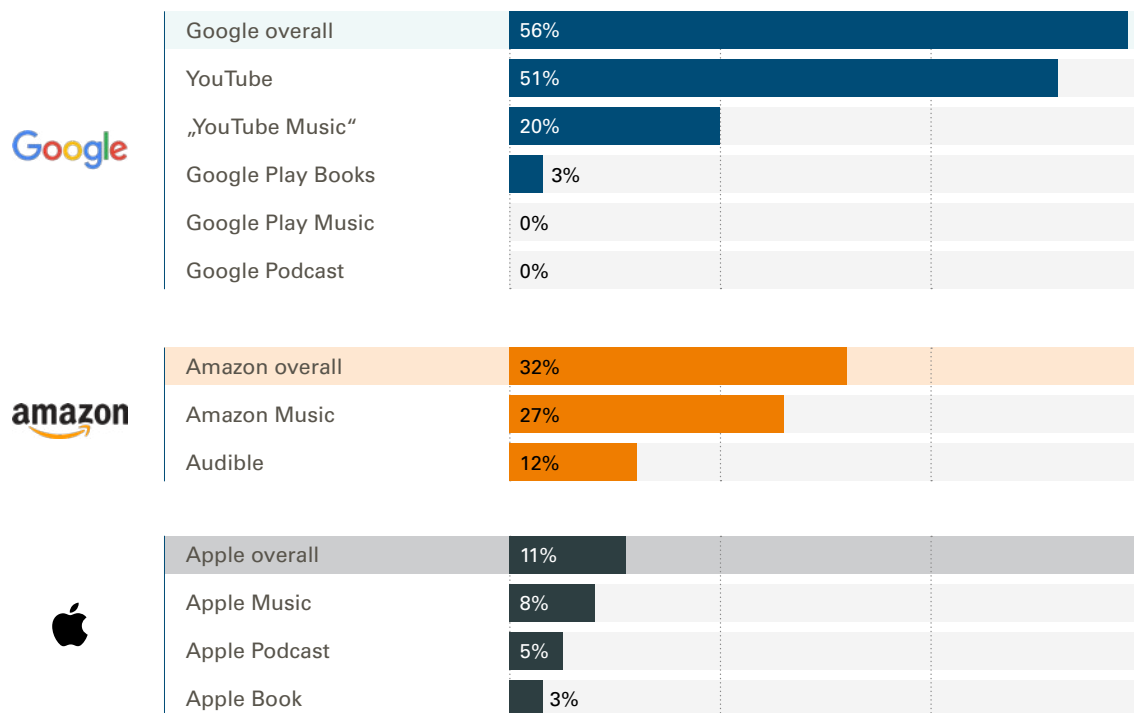
Figure 55: Use of platforms for on-demand audio, online population 15+



Source: RTR Online Audio Monitor Austria 2025, basis: percentage of users of on-demand audio

Second-placed among the most popular on-demand platforms was Swedish streaming provider Spotify with its 40% share (2023: 35%), followed by Amazon which remained unchanged at 32% (2023: 33%) along with its Music (2025: 27%; 2024: 26%) and Audible (2025: 12%; 2024: 12%) products. The on-demand portfolio from Apple followed at some distance in fourth place (11%) in 2025, with no changes among the individual Apple offerings (Apple Music: 8%; Apple Podcast: 5%; Apple Books: 3%).

**Figure 56: Most popular on-demand audio platforms with services, online population 15+**



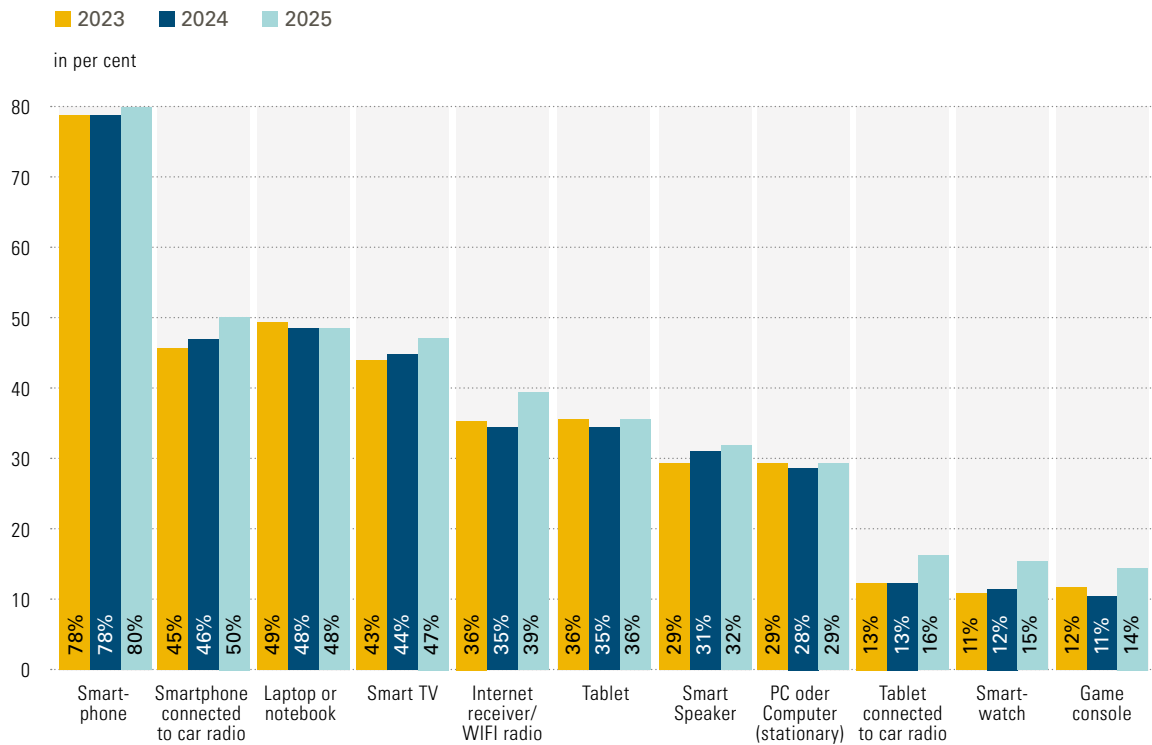
Source: RTR Online Audio Monitor Austria 2025, basis: percentage of users of on-demand audio

Among on-demand platforms with less than 10% of responses, websites and apps from radio stations (as a group) lead this field on 9%, followed by SoundCloud and radio platforms (as a group), which earned an unchanged 6% of responses. Deezer, which lost one percentage point in 2024, was named more frequently in 2025. This resulted in an increase of 2 percentage points to 6%. Other on-demand platforms accounted for 2% to 5% of responses.

#### **Device use for online audio—overall in 2025**

Smartphones were once again the most popular device by a wide margin for online audio consumption in 2025, showing continued growth due to connectivity with car audio systems. With the exception of laptops, all devices that can be used for online audio consumption are seeing an increase in use.

**Figure 57: Device use for online audio, online population 15+**



Source: RTR Online Audio Monitor Austria 2025, devices named as percentages, online audio users

Able to make multiple responses, 80% of respondents stated that they use a smartphone to consume online audio content (2024: 78%). A further 50% also pair the phone with a car radio (2024: 46%). Overall, smartphones were used in 2025 by 83% of respondents to listen to online audio content. Similarly to the previous year, laptops still received 48% of responses, while Smart TVs caught up and were named by 47% of respondents (2024: 44%). At 39%, Wi-Fi radios were mentioned significantly more often than in the previous year (2024: 35%), followed by tablets, which at 36% of responses have held roughly the same level for the past three years (2024: 35%; 2023: 36%). An additional 16% also pair a tablet with their car radio (2024/2023: 13%). Smart speakers made a gain of just 1 percentage point to 32%, in line with the previous upward trend (2024: 31%; 2023: 29%). Desktop (stationary) PCs continued to play a role as devices used by 29% of respondents to listen to online audio content. Smart watches were also on an upward trajectory in 2025 at 15% (2024: 12%; 2023: 11%) as were games consoles with 14% (2024: 11%; 2023: 12%).

Reflecting the launch of the AI Service Desk at RTR in the same year, the 2025 study again included questions surveying the acceptance of audio content generated by artificial intelligence. This is approved by a slightly larger majority of respondents (55%; 2024: 53%), on condition that such content is also labelled as having been created with the help of AI tools. Approval for AI-generated music fell slightly to 39% (2024: 41%). At 38%, AI-generated weather forecasts and traffic updates gained the most and sharpest increase (2024: 35%). AI-generated voices for speakers or well-known people were poorly received (approval rate of 18%; 2024: 15%) and podcasts generated entirely by AI—included in the survey for the first time in 2025—also received just 18% of the vote.

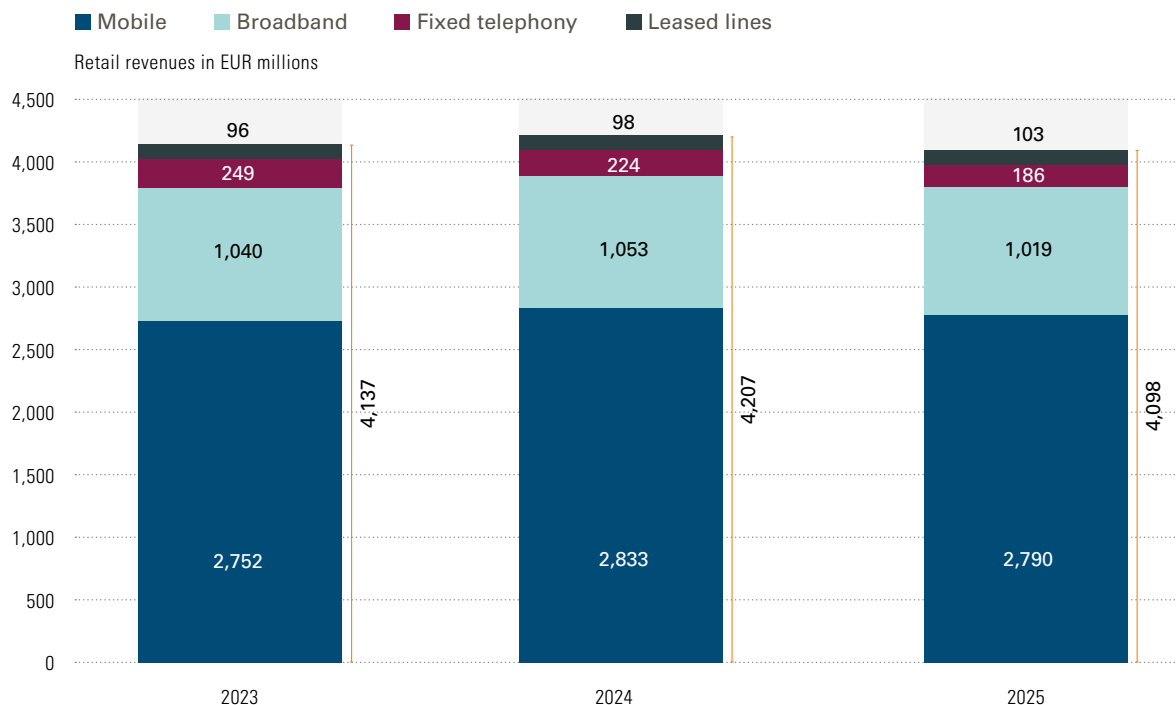
The RTR Online Audio Monitor 2025, complete with data-rich charts and tables, can be accessed from the RTR website at [www.rtr.at/OAMA2025](http://www.rtr.at/OAMA2025).

## 10.2 Developments in the telecommunications markets

This section provides a summary of the most significant market developments in mobile telecommunications, broadband and fixed network services during the reporting year.

In 2025, retail revenues in the telecommunications sector dropped overall by 2.6%, from EUR 4.21 billion to EUR 4.10 billion. The largest decline was seen in revenues from fixed voice services (–17.1%). Year-on-year losses were also recorded in broadband (–3.2%)<sup>54</sup> and mobile services (–1.5%, including mobile data subscriptions). This contrasts with revenues for leased lines and Ethernet services, which rose by 5.5%. In 2025, a little more than two-thirds of overall revenue was earned with mobile services. Broadband contributed another 25%, while fixed network telephony and leased lines together totalled only 7%.

**Figure 58: Retail revenues from mobile, fixed broadband, fixed voice and leased line services, 2023–2025**



Source: RTR

The key market developments in 2025 as listed below are described in detail in the section that follows:

- Internet technologies: more fibre, less DSL but mobile is the most popular
- Fibre deployment proceeds apace, with open-access networks playing a key role
- Mobile telecommunications: End-user revenues show slight decline
- Mobile telecommunications: MVNOs continue to make inroads
- Mobile and fixed data volumes show steady growth
- Vigorous use of communication services on the internet

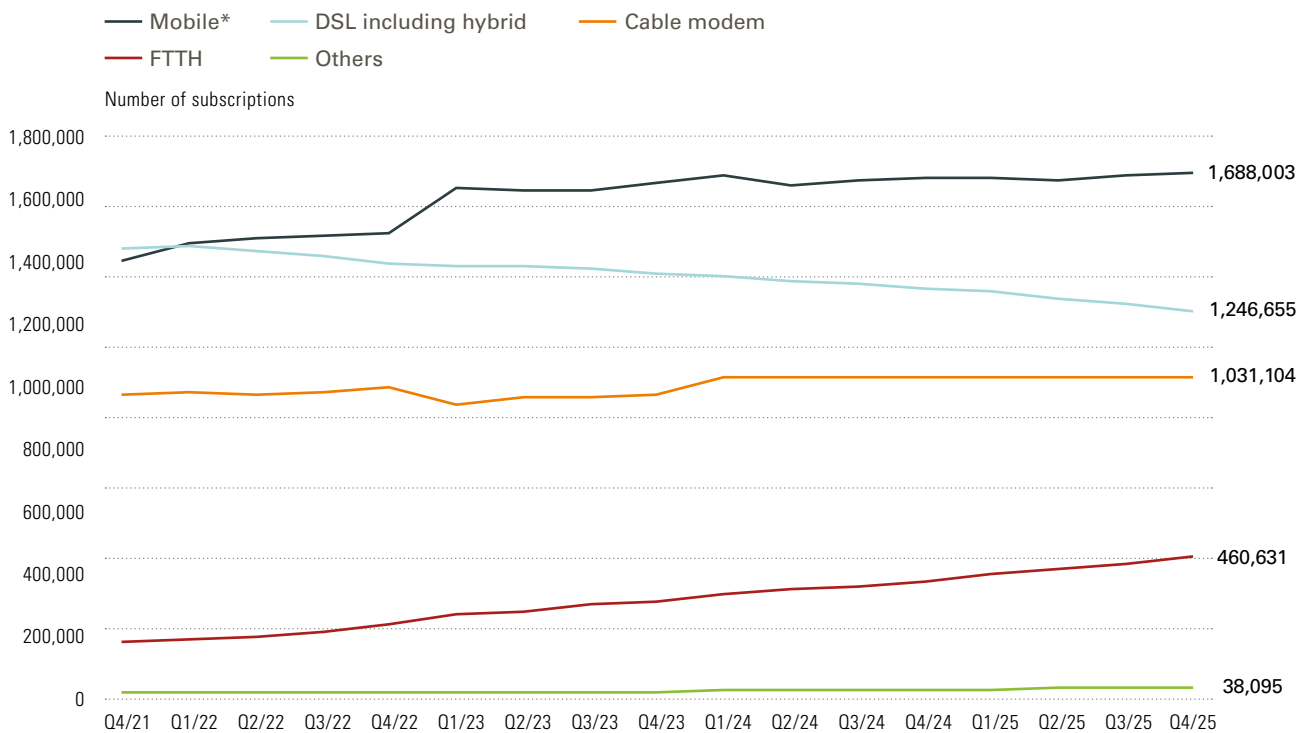
<sup>54</sup> Although RTR's quarterly data survey does not include many of the new optical fibre networks established over the last few years or the providers operating over these networks.

**Internet technologies: more fibre, less DSL but mobile is the most popular**

A variety of technologies are used to provide internet access at home or on company premises. Apart from the copper network operated by A1 (with DSL as the transmission technology), coaxial cable networks (originally installed for cable television) are also available for more than two thirds of households. Rising demand in bandwidth has been driving the continued rollout of fibre networks (in some cases with government funding) that provide fibre to the building (FTTB) as well as fibre to the home (FTTH). Many households also rely on mobile telephony for their internet access, with 'cubes' for mobile broadband combined with unlimited data subscriptions as popular as ever in homes.

Internet access by technology type is presented in figure 59. The number of DSL connections shows a steady decline, reflecting the relatively modest bandwidths now offered by this technology. DSL connections (including hybrid connections<sup>55</sup>) accounted for around 28% of all connections in Q4 of 2025. FTTH connections, in contrast, rose year-on-year by around 21% to 461,000 connections and thus now make up about 10% of all active connections. In Q4 2025, 38% of all connections were served with mobile broadband, the most popular technology since 2022. Despite some new entrants to the Austrian market (such as Starlink), satellite internet remains a niche product, with some 17,000 connections in the fourth quarter of 2025.

**Figure 59: Internet access by technology type**



\*) Mobile data subscriptions with unlimited data  
Source: RTR

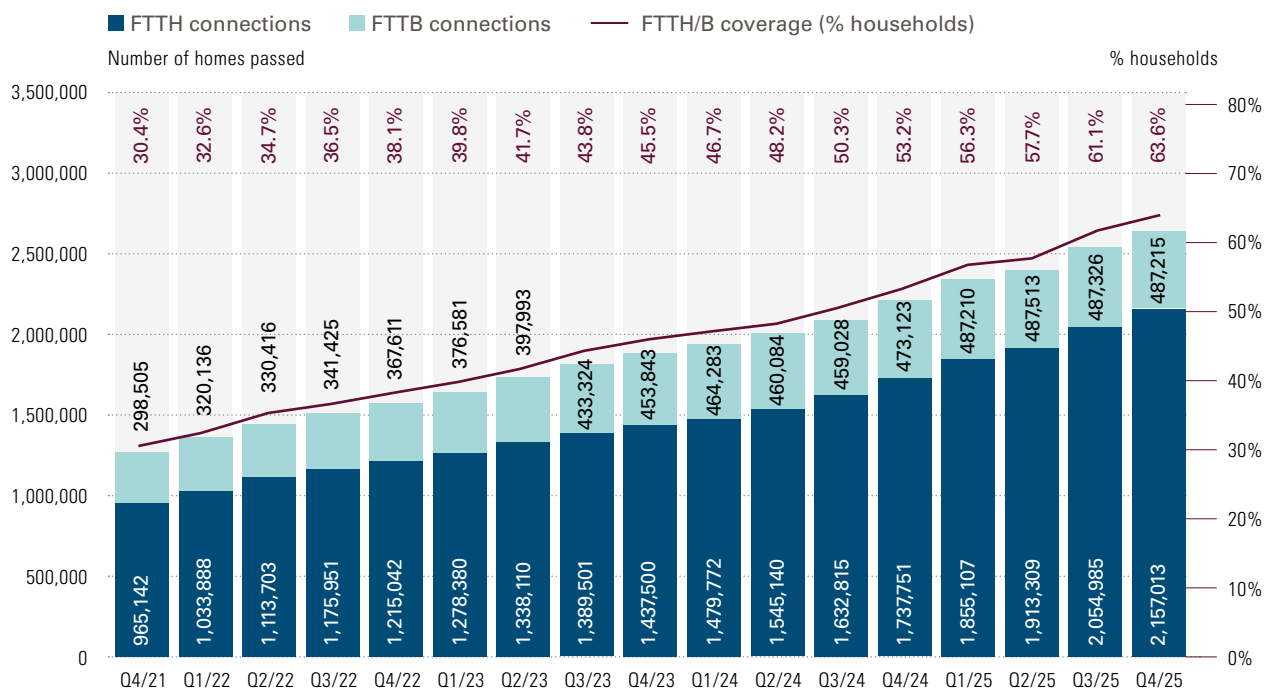
55 Hybrid connections offer the option of using mobile broadband to 'beef up' the main DSL connection when higher bandwidths are needed.

## Fibre deployment proceeds apace, with open-access networks playing a key role

Both the European Union and the Austrian federal government are pursuing ambitious targets to achieve nationwide coverage with internet connections using very high bandwidths. The European Commission's Digital Decade targets aim to achieve wide-area coverage of all European households with symmetrical gigabit-enabled access networks by 2030.<sup>56</sup> This objective is also being pursued by the Austrian Broadband Strategy 2030.<sup>57</sup> A key element here is the installation of fibre networks. These extend either at least to the building (fibre to the building, FTTB), with copper or coax cables installed within the building, or even as far as the user's actual apartment or house (fibre to the home, FTTH).

Fibre deployment in Austria has proceeded by leaps and bounds over the last few years. Established market operators like A1 have been joined by alternative providers, international investors as well as public companies at municipal and regional level. As a result, FTTB/H coverage in Austria has been consistently advancing in recent years. Figure 60 shows the trend for 2021–2025. Coverage figures here refer to potentially available connections ('homes passed') and not connections in actual use. In 2025, coverage again increased significantly to approximately 2.6 million homes passed in the fourth quarter of the year. Based on roughly 4.16 million households, 64% have FTTB/H coverage. FTTH accounts for by far the greatest share of this coverage (approx. 2.2 million or 52% of households in Q4 2025), with FTTB coverage accounting for the remaining 487,000 households (coverage of 12% of households).

**Figure 60: FTTB/H connection coverage**



Source: RTR, coverage based on 4,158,500 private households according to Statistics Austria<sup>58</sup>

<sup>56</sup> Refer to [https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030\\_en](https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030_en).

<sup>57</sup> Refer to [https://data.breitbandbuero.gv.at/PUB\\_Breitbandstrategie-2030.pdf](https://data.breitbandbuero.gv.at/PUB_Breitbandstrategie-2030.pdf).

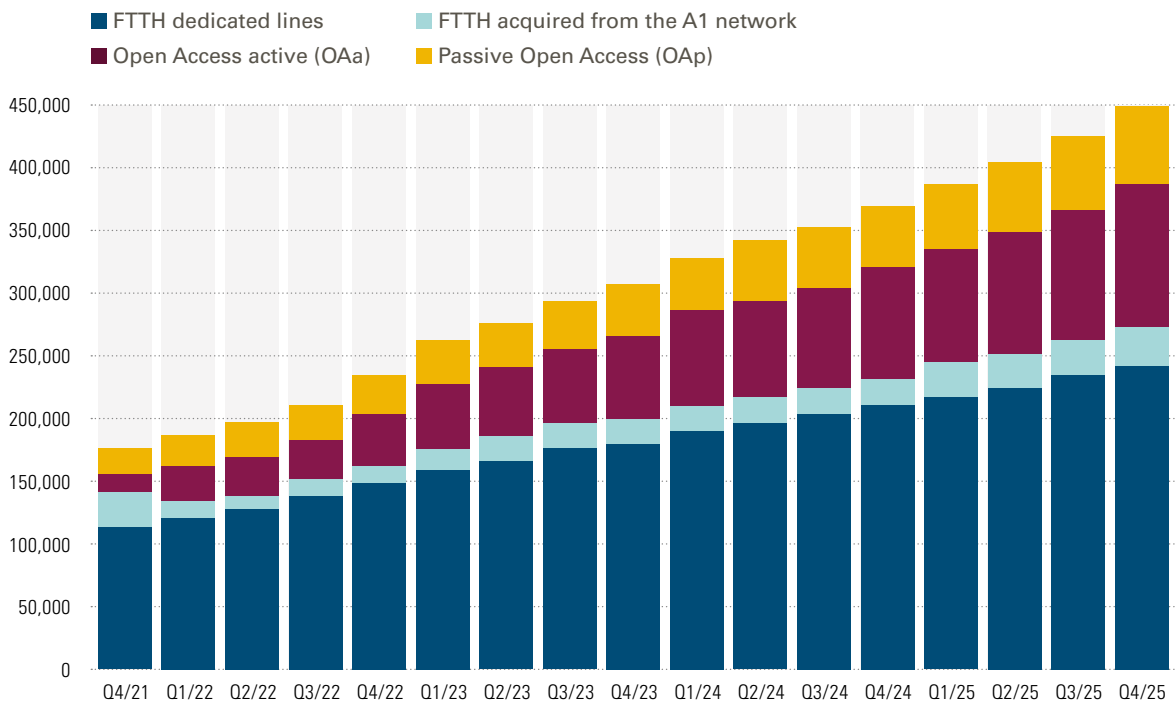
<sup>58</sup> Refer to <https://www.statistik.at/en/statistics/population-and-society/population/families-households-living-arrangements/private-households>.

Open-access networks (OANs) have a major role to play in the fibre deployment process. These networks are available for access to any provider of internet and telecommunications services for the purpose of offering their products to end users. In many cases, such optical fibre (FTTH) networks set up with the help of government grants: guaranteeing open access was therefore a binding condition for grant applicants. Some operators also open their networks voluntarily, either in keeping with their business models or with the expectation of economic benefit.

Currently there are more than 200 open-access networks of varying sizes in Austria. The majority of these networks are located in Lower Austria, Upper Austria, Styria, Carinthia and Tyrol. Although the networks in Tyrol are available almost exclusively on a passive-access basis (physical unbundling, open access passive, OAp), access in the other provinces is primarily offered via active wholesale services (virtual unbundling, open access active, OAa).

Figures for fibre network usage have seen slow but steady growth. Figure 61 shows actively used FTTH connections over time, broken down into four categories: operator’s own lines, lines purchased from A1, and open access connections (both active and passive). In Q4 2025, active FTTH connections numbered 461,000, representing a year-on-year rise of 21% compared with 2024. While most of these connections (54% or 249,000) are based on the operator’s own infrastructure, no fewer than 39% of active FTTH connections depend on wholesale services provided via open-access networks. Of these, some 117,000 connections (25%) are based on active wholesale services (open access active) and another 64,000 (14%) on passive wholesale services (open access passive, i.e. physical unbundling of the fibre local loop). A further 31,000 (7%) FTTH connections have been implemented using wholesale services purchased from A1 Telekom Austria. Overall, actively used FTTH connections thus exhibit an increasingly diversified structure in which open-access networks are playing an ever more important role.

**Figure 61: Actively used FTTH connections over time, by category**



Source: RTR

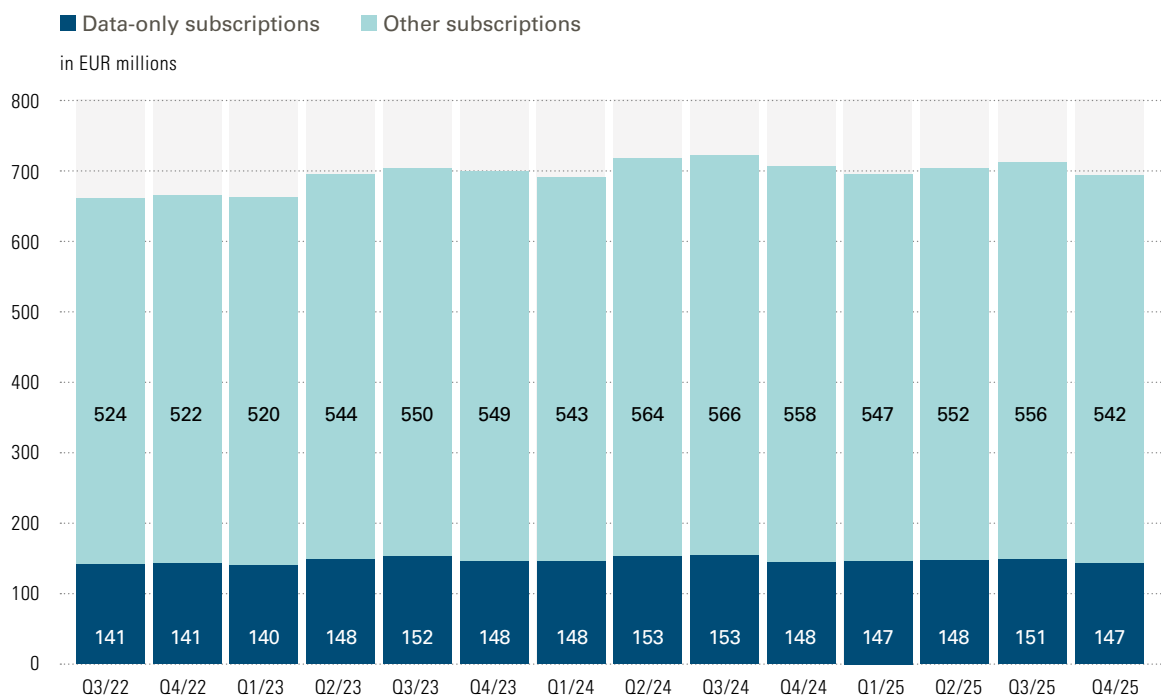
For FTTH networks, the ratio of actively used connections to FTTH coverage yields the take-up rate. This indicates how many households actually use an available FTTH connection. Although the take-up rate in 2021 was still only around 19%, the rate has grown steadily in each year since. The take-up rate was 23.1% in the fourth quarter of 2025. Despite this positive trend, the figure means that still only roughly one in five FTTH connections is actively used. In terms of both rollout and take-up, fibre in Austria therefore still has plenty of potential.

### Mobile telecommunications: end-user revenues show slight decline

End-user revenues from mobile services fell slightly in 2025 (Figure 62). Despite constant growth during 2023 and 2024 (+4.7% and +2.8%), 2025 recorded a modest downturn of 2.3%. Behind this trend are mutually counteracting effects. While inflation-driven changes to pricing have led to rising average revenues from existing customers, highly competitive strategies such as time-limited discounts or free months for new customers have been tightening earnings from new customers and customers changing plans.

The ratio of mobile service revenue components to one another remains largely stable. Data-only subscriptions, which typically include mobile broadband connections for home use, still contribute around a quarter of total revenue. The 'Other subscriptions' category, which primarily comprises smartphone subscriptions (with included data, minutes and texts) continues to provide the lion's share of revenue and is thus the core revenue segment in the mobile services market.

**Figure 62: Retail revenues from mobile services (excl. M2M)**



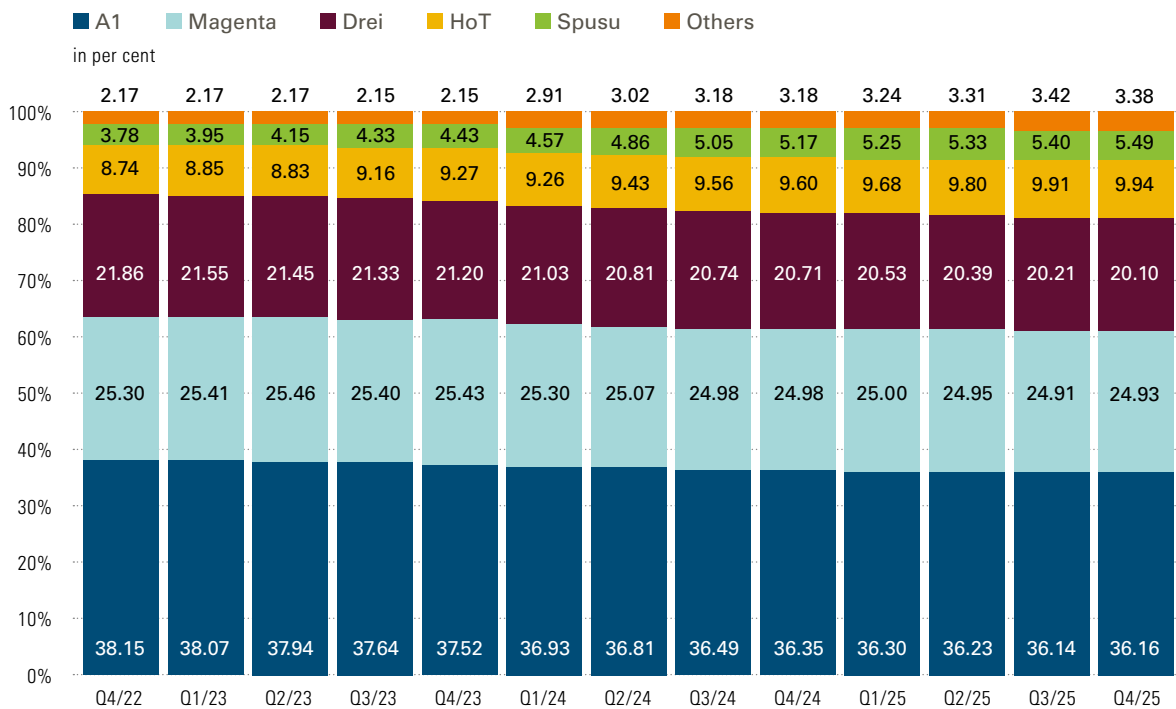
Source: RTR

**Mobile telecommunications: MVNOs continue to make inroads**

The number of SIM cards issued (all subscriptions, excluding M2M<sup>59</sup>) remained virtually unchanged year on year at around 13.8 million by the end of 2025. A1 held on to its lead, followed by Magenta and then Drei. Measured by SIM cards issued, all of the 'big three' network operators lost a modest amount of market share in 2025, while mobile virtual network operator (MVNOs) were able to further increase their shares. MVNOs do not have their own access network but 'piggyback' on the networks operated by A1, Magenta or Drei.

Overall, MVNO market share rose to around 18.8% at the end of 2025. The leading brands within this segment are HoT (9.9%) and Spusu (5.5%). The rise marks a continuation of the inroads into the mobile services market made by alternative providers. Two additional companies—Österreichischen Post AG and Wien Energie—have announced their intention to start operating as MVNOs in 2026, underscoring how dynamic the mobile services market is.

**Figure 63: Mobile market shares by SIM card (excl. M2M)**



Source: RTR

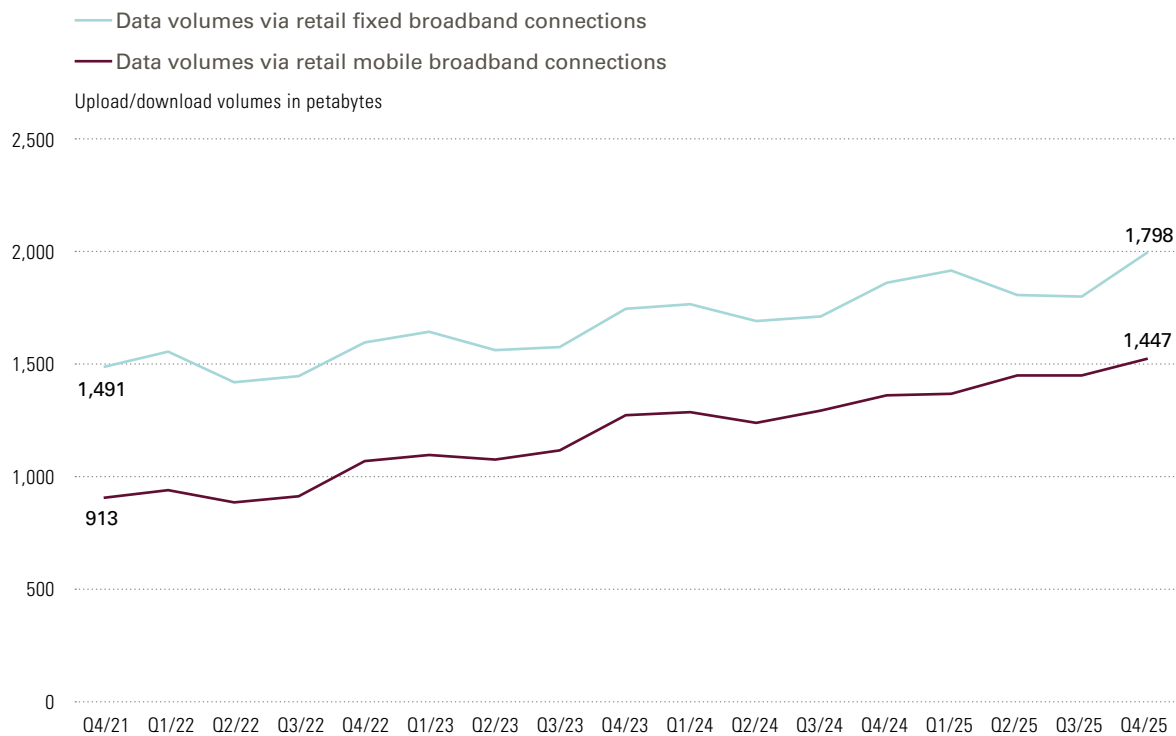
59 M2M stands for 'machine-to-machine' and describes the SIM cards used in devices or machinery (e.g. cars) that can communicate without human intervention.

### Mobile and fixed data volumes show steady growth

The use of data-hungry online services continued to grow in 2025, with the annual data volume used via fixed and mobile broadband connections rising year on year by 8.9%—from 12.2 to 13.3 exabytes.<sup>60</sup> To put that into perspective, that is roughly the same volume of data that would be consumed by all 9 million people in Austria downloading a one-hour film in HD (roughly 4 GB) every day.

This year's rise is part of a longer-term trend, with annual data volume having shown continued growth over the last few years. A seasonal pattern can also be seen for both fixed and mobile consumption (see figure 64). In the colder months of the year (Q4 and Q1), a larger volume of data is used than in the warmer months—most likely due to higher video consumption during winter. Mobile data is also taking an increasingly larger share of overall volume. This figure rose from 38% in the fourth quarter of 2021 to 43% in the same quarter of 2025.

**Figure 64: Data volumes for fixed and mobile broadband connections over time**



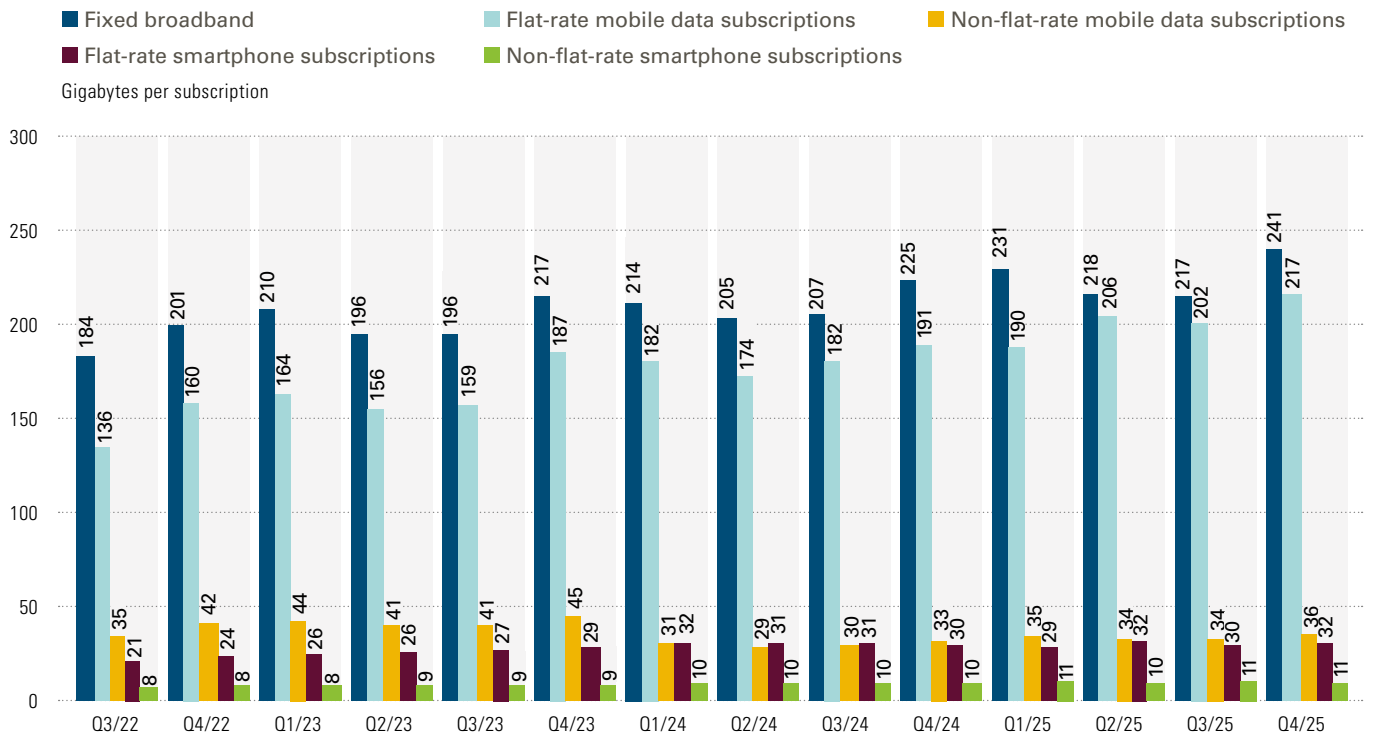
Source: RTR

The data volume consumed per connection varies markedly by the connection type and the customer's chosen plan (see Figure 65). Especially high usage figures were seen with fixed broadband and with mobile flat-rate data subscriptions: these types of connection use more than 200 GB per connection and month on average. These figures imply that the choice of a fixed broadband subscription or a mobile flat-rate data subscription significantly favours data usage, as the customer is not subject to volume-related limits.

<sup>60</sup> 1 exabyte is equivalent to 1 billion gigabytes.

In contrast, average data volumes were significantly lower for both mobile data subscriptions without a flat rate and conventional smartphone subscriptions. In the fourth quarter of 2025, average consumption was around 36 GB per month for mobile data subscriptions without a flat rate. The figure was 32 GB per month for flat-rate smartphone subscriptions and just 11 GB per connection for smartphone subscriptions without a flat rate.

**Figure 65: Data volume per connection**



Source: RTR

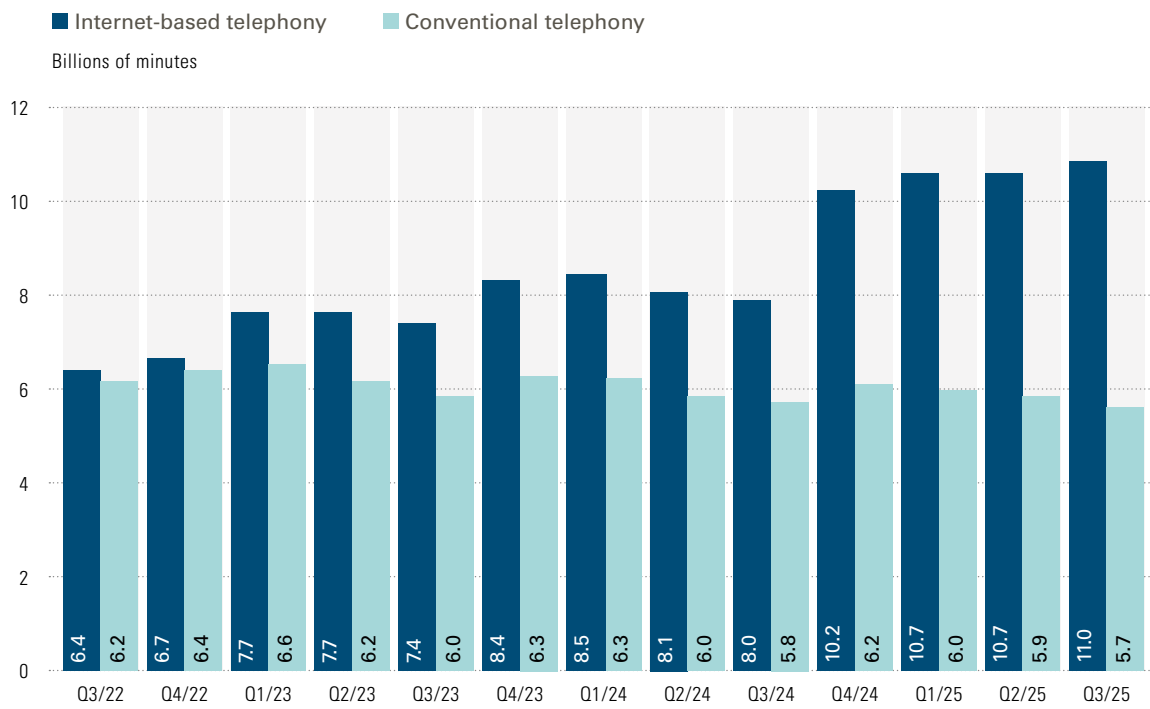
**Vigorous use of communication services on the internet**

Alongside the use of conventional voice telephony and texting, internet-based communication is now commonplace in Austria, facilitated by the steady rise in smartphone usage. The communications services used include email, messaging via apps such as WhatsApp, Signal, Facebook Messenger and iMessage, as well as VoIP and video calling via providers such as WhatsApp and Microsoft Teams. RTR has collected the corresponding usage data directly from major providers including Meta, Google and Microsoft since 2022.

Figure 66 presents comparative voice minute volumes over time for internet-based communication platforms and conventional telephony (fixed-line and mobile). Figures for internet-based telephony include minutes from voice-only calls as well as video calls and videoconferencing.<sup>61</sup> As can be seen from the chart, the overall volume of conventional voice minutes has remained largely stable, while the volume of internet-based voice minutes follows a steady upwards trajectory. In 2025, the volume of voice minutes handled by internet-based services was roughly double the figure for conventional telephony—a difference of around 5 billion minutes. This marks a continuation of the trend observed over the last few years, with internet-based communication platforms gaining ground as conventional telephony stagnates.

61 Call durations are counted only once for calls or video conferences with more than two participants.

**Figure 66: Call minute volumes for internet services and conventional telephony**



Source: RTR; data from Q4/2025 were still outstanding as of the reporting date

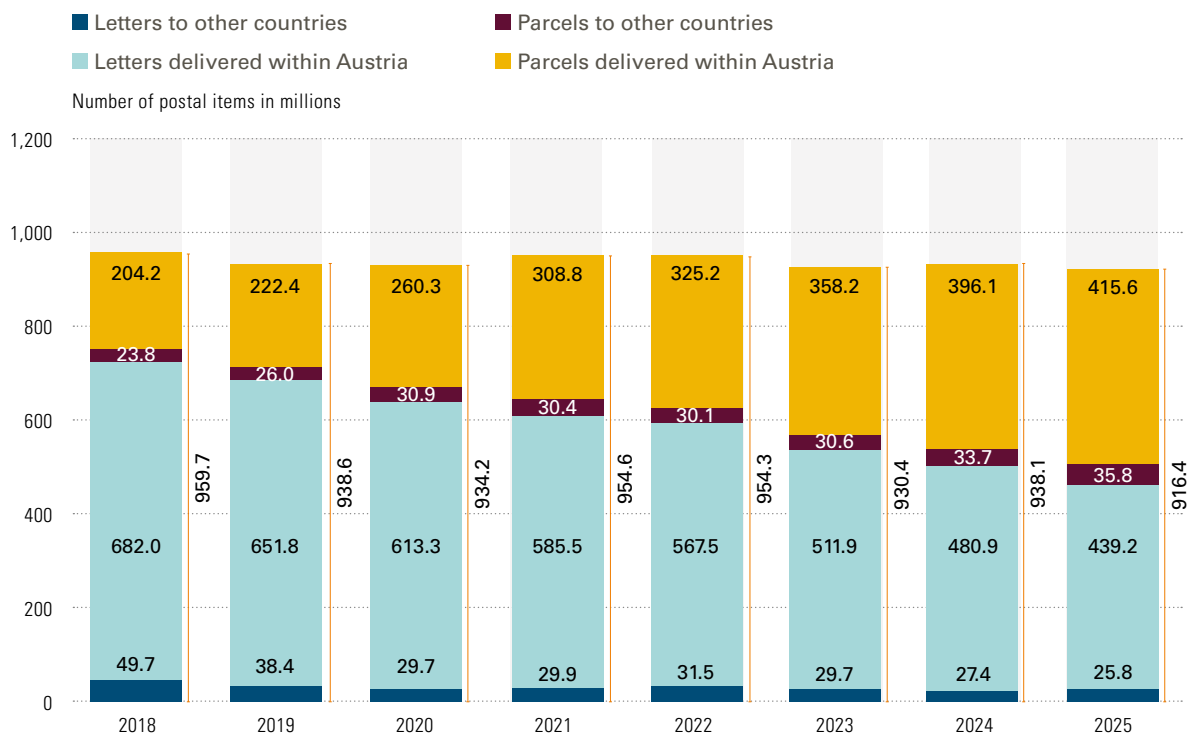
### 10.3 Developments in the Austrian postal market

RTR has been collecting quarterly data from Austrian postal service providers since 2013, focusing in particular on items such as revenues, mail volumes and employees. These data on the postal market and related developments are presented every quarter in the RTR Post Monitor.

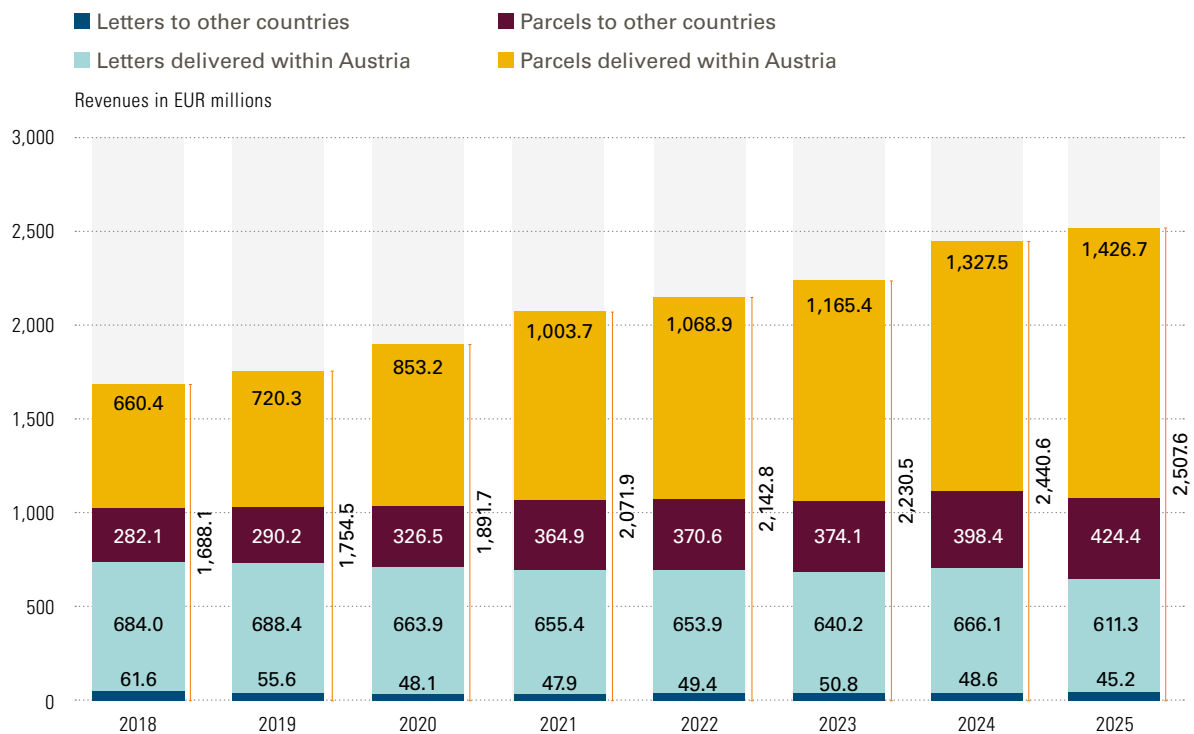
In step with international trends, the Austrian postal market has experienced in recent years a decline in letter volumes, and in some cases a sharp rise in parcel deliveries. Digitisation and the switch to digital forms of communication have accelerated the decline in letter services, whereas the increasing popularity of ecommerce continues to be the main driver behind swelling parcel volumes.

The total number of postal items conveyed in Austria fell from 938 million in 2024 to 916 million in 2025. This loss, stemming primarily from the decline in letter volumes (domestic deliveries: -9%; foreign: -6%), was not offset by the increase in parcels sent (domestic: +5%; foreign: +7%).

**Figure 67: Total letter and parcel volumes in millions**



Although revenue from letters increased in 2025 compared with the previous year (domestic deliveries: -8%; foreign: -7%), within the same period there was a significant increase in parcel revenues (domestic: +8%; foreign: +7%). This resulted overall in a 3% increase in revenues.

**Figure 68: Total revenues from letters and parcels in EUR millions**


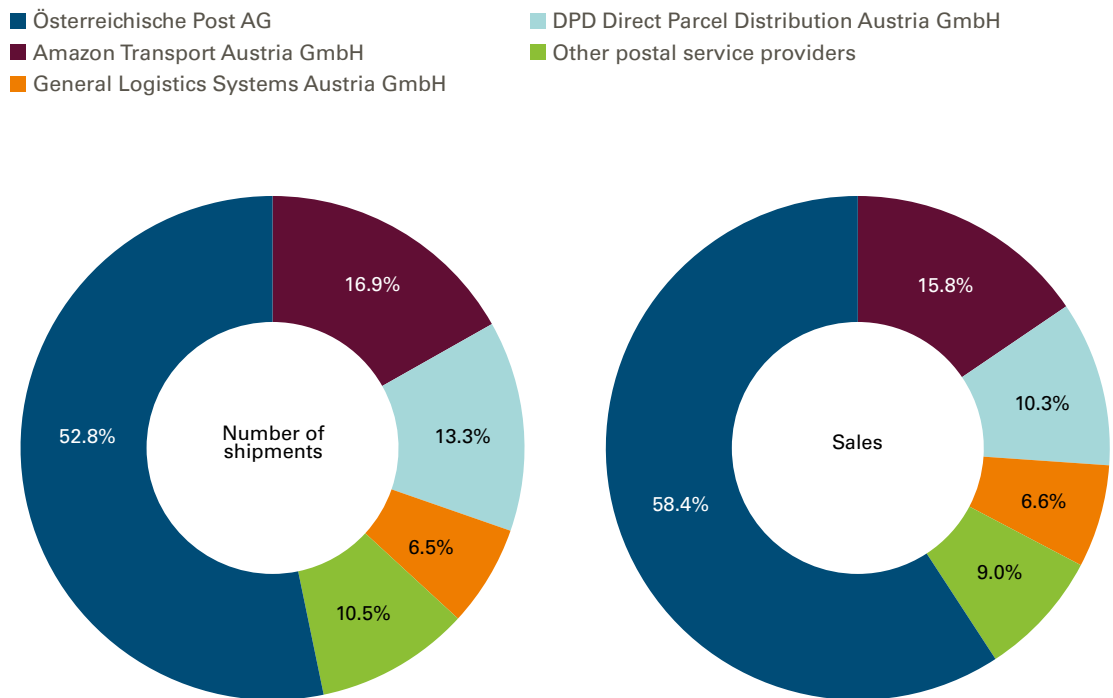
Data relating to the sustainability of conveying such postal items were collected for the first time in Q4 2025.

Only 1% of vehicles weighing over 3.5 tonnes are electric-powered, whereas electric vehicles account for 48% of vehicles 3.5 tonnes or less, and even 87% among mopeds. Some 530 electric cargo bikes are also registered.

The Austrian parcel market is dominated by only a few large companies. Their market shares vary depending on whether parcels delivered within Austria or whether outbound parcels are considered.

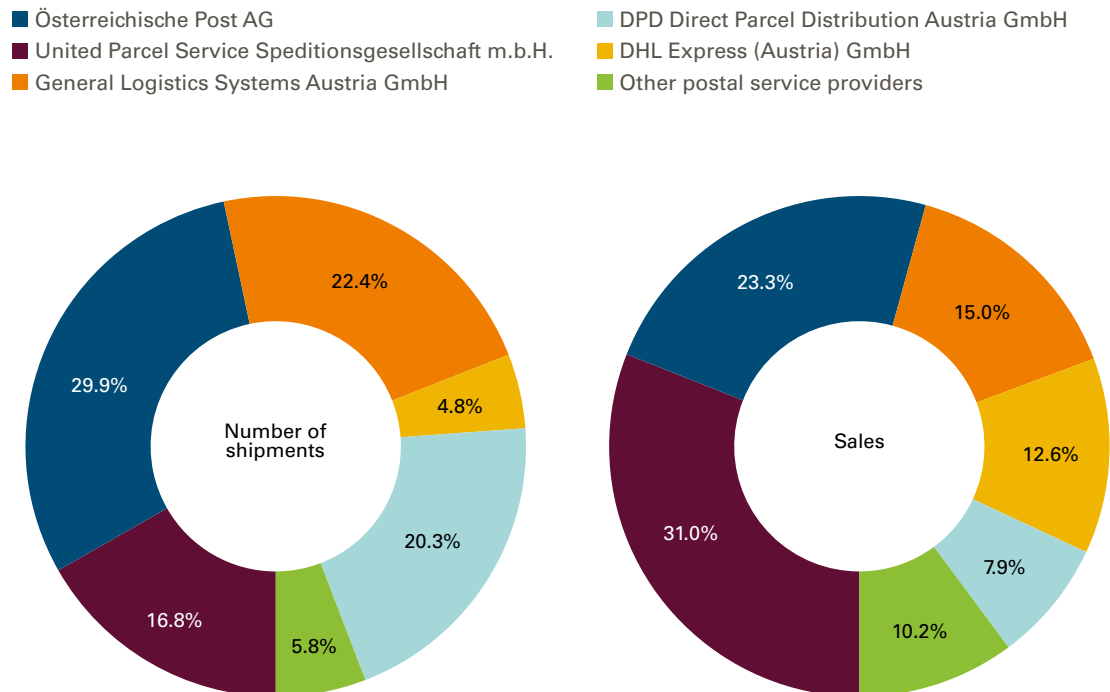
With a market share by revenue of 58.4% (and 52.8% by volume), Austrian Post remains the leader in the market for parcels delivered to domestic destinations. Amazon follows with 15.8% (16.9%), ahead of DPD Direct Parcel Distribution Austria GmbH with 10.3% (13.3%) and General Logistics Systems Austria GmbH at 6.6% (6.5%). Other postal service providers account for 9.0% (10.5%).

**Figure 69: Market shares—parcels delivered within Austria**



The market for foreign parcel deliveries presents a somewhat different picture. In terms of revenue, United Parcel Service Speditionsgesellschaft m.b.H. takes first place with 31.0%, followed by Austrian Post (23.3%), General Logistics Systems Austria GmbH (15.0%), DHL Express (Austria) GmbH (12.6%) and DPD Direct Parcel Distribution Austria GmbH (7.9%). The remaining providers together claim a market share of 10.2%. When market shares are compared in terms of letter and parcel volumes, Austrian Post is in the lead with 29.9%, followed by General Logistics Systems GmbH (22.4%), DPD Direct Parcel Distribution Austria GmbH (20.3%), United Parcel Service Speditionsgesellschaft m.b.H. (16.8%) and DHL (Express) Austria GmbH (4.8%). All other providers together conveyed 5.8% of parcels sent to other countries.

**Figure 70: Market shares—parcels delivered to other countries**



The RTR Post Monitor describes the Austrian postal market in detail, including quarterly evaluations. It is available (in German) from the RTR website at <https://www.rtr.at/TKP/aktuelles/publikationen/Uebersichtseite.de.html?!=de&q=&t=category%3Dpostmonitor>.



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