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WorldDAB 2025-2028

*Strengthening the Core,
Expanding Frontiers,
Securing Automotive*



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WorldDAB 2025-2028

Strengthening the Core, Expanding Frontiers, Securing Automotive

Foreword

Dear reader,

As we navigate a fast-changing world marked by geopolitical shifts, high chances of disruption and rapid evolution of media consumption, **the need for “emergency resilient” and “universally accessible” digital terrestrial radio has never been more pressing.** As WorldDAB, a global industry forum for digital radio based on the DAB standard, we developed a strategic plan for 2025-2028, named “*Strengthening the Core, Expanding Frontiers, Securing Automotive*”. Our plans mark a decisive step forward in ensuring DAB+ continues to play a vital role in the global broadcasting landscape.

WorldDAB is at the forefront of digital radio, championing the DAB standard and uniting a global community of 100+ members. With its reach extending across Europe, MENA, Sub-Saharan, Africa, Asia-Pacific and beyond, WorldDAB has built a reputation for driving innovation, supporting broadcasters and regulators, and advocating for DAB+ adoption, especially within the pivotal automotive sector.

The 2025-2028 strategy is defined by its sharpened focus and strong commitment to action. With finite resources and increasing demands, WorldDAB is adopting a more differentiated country approach, prioritizing regions where the impact can be most significant, while continuing to deliver high-quality support wherever it is needed. By focusing on leading indicators within our direct control, we aim to drive more tangible, measurable progress, even amid uncertainty.

This strategy was developed through a structured, data-driven process, organised in three progressive waves. Each phase was informed by industry expertise, robust analysis, and meaningful stakeholder input. More than just a roadmap, this document reaffirms WorldDAB’s vision and commitment to a thriving future for digital radio. It embraces the opportunities and challenges of today’s landscape – from the essential role of trusted public broadcasting, and the economic strength and creative vitality of commercial radio in safeguarding media plurality and cultural diversity, to the rise of IP-based platforms, the evolution of in-car listening, the diverse pace of digital rollout globally, and shifts in consumer behaviour around radio devices.

This strategy provides clarity, direction, and inspiration for all stakeholders. By working together, with focus and agility, we can ensure that DAB+ continues to thrive and to deliver lasting value to audiences worldwide.

Jacqueline Bierhorst
President, WorldDAB
September 2025

WorldDAB's 2025-2028 strategy consists of 3 pillars...



Coverage | Communication | Content

Help countries move forward – building local success stories that serve the global mission

Make the case

WorldDAB gathers and shares compelling business cases to help countries understand the long-term benefits of DAB+

Shape the framework

WorldDAB provides tailored regulatory guidance to help governments and regulators create the conditions for successful DAB+ deployment

Connect the ecosystem

WorldDAB fosters collaboration across broadcasters, regulators, manufacturers, and automotive stakeholders to ensure momentum at every stage of DAB+ adoption



Consumer devices

Anchor DAB+ in everyday listening

Build awareness

WorldDAB promotes a unified DAB+ brand and messaging to increase recognition and trust among consumers.

Inspire demand

WorldDAB supports national campaigns that clearly communicate the benefits of DAB+ - from exclusive content to better sound and crisis resilience.

Increase accessibility

Helping countries tackle cost perception and highlight value, making tabletop radios more appealing and widely adopted.



Cars

Make digital radio a standard feature drivers can trust and enjoy

Increase availability

Increase the number of cars with DAB+ worldwide

Enhance user experience

All cars with DAB+ should provide a great user experience

... and 5 drivers of DAB+ adoption



Why DAB+?

The benefits that drive adoption

Free to listen

More choice

**Crystal-clear
sound**

**Reliable in
emergencies**

Future-ready

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1. Introduction

1.1. Why this strategy exercise was initiated

Every day, the team at WorldDAB are putting in all their efforts to position DAB+ as the free-to-air broadcast backbone for radio's digital future. In an increasingly uncertain macroeconomic and technological landscape, it's clear the **need for a robust and future-proof terrestrial digital radio landscape** has never been greater.

In this updated strategy document, WorldDAB's looks three years ahead towards 2028. Doing this, we aim to build maximally upon the foundations of the previous strategy, presented in March 2023. A big part of the previous strategy still is relevant today:

- The **vision of World DAB remains unchanged** and central to the organization:



Every person can enjoy free-to-air digital radio – on the move, at home, or at work – with DAB+ at the core of this listening experience

- The **mission remains unchanged**; to position DAB+ as the free-to-air broadcast backbone for radio's digital future.
- The **three strategic pillars remain consistent**, although their wording has been reviewed and refined to reflect the organization's evolving ambitions:
 - **Strengthen the core** – Support established DAB+ markets to ensure long-term growth.
 - **Expand to New Markets** – Drive DAB+ adoption in emerging regions.
 - **Secure Automotive** – Embed DAB+ as a default feature in all new vehicles.

WorldDAB's core role is to provide tailored **regulatory guidance** and help define a **compelling business case** to enable countries to create their own success stories.

In this strategic cycle, particular emphasis is placed on the two key listening environments: **automotive and receiver sales**. These are the primary channels through which listeners access DAB+, and their success is essential to the platform's overall sustainability and growth. WorldDAB will intensify efforts to support both segments – from industry engagement and regulatory alignment in the automotive sector to promotion and availability of consumer devices in the retail market.

- To guide this strategy and deliver on its ambitions, on top of a clear regulatory framework, WorldDAB also continues to rely on the **5 Cs**, which serve as key enablers for the 2025-2028 strategy:
 - **Coverage**: Ensure strong DAB+ coverage across cities, towns, and road networks.
 - **Content**: Promote compelling content offerings that outperform traditional FM.
 - **Consumer Devices**: Collaborate with leading manufacturers and retailers to grow device availability and adoption.
 - **Cars**: Leverage the EECC to drive in-car penetration, while ensuring coverage and service quality meet driver expectations.

- **Communication:** Sustain consistent promotion and public engagement – across FM, digital, and broader media platforms – to build awareness and trust in DAB+.

What we updated, is **the how**. The objective of this strategy review mainly was to make the strategy **more focused** and **more actionable**.

<u>More focused</u>	<u>More actionable</u>
While continuing to serve the world, WorldDAB opt for a more focused and differentiated country approach to generate maximum success stories . WorldDAB focuses on proactive efforts on countries with highest prospect of success and on providing excellent reactive support to the other countries which request WorldDAB's services.	WorldDAB will benefit from defining leading KPIs , within the circle of control ¹ of WorldDAB's project office, rather than lagging KPIs ² , on which you can only have indirect influence. This will lead to maximum result despite a small number of resources.

This strategy document is not intended to be static. Rather, it is a **living document** that will **evolve over time** in response to changes on the ground – whether macroeconomic shifts, political developments, or progress made through WorldDAB's proactive actions. As countries advance in their DAB+ journey, and as new challenges or opportunities arise, **this strategy will be continuously refined** to ensure that WorldDAB remains responsive, relevant, and effective in achieving its mission.

2. World DAB aims to focus proactive efforts on 20 priority countries

2.1. How we selected the prioritized countries

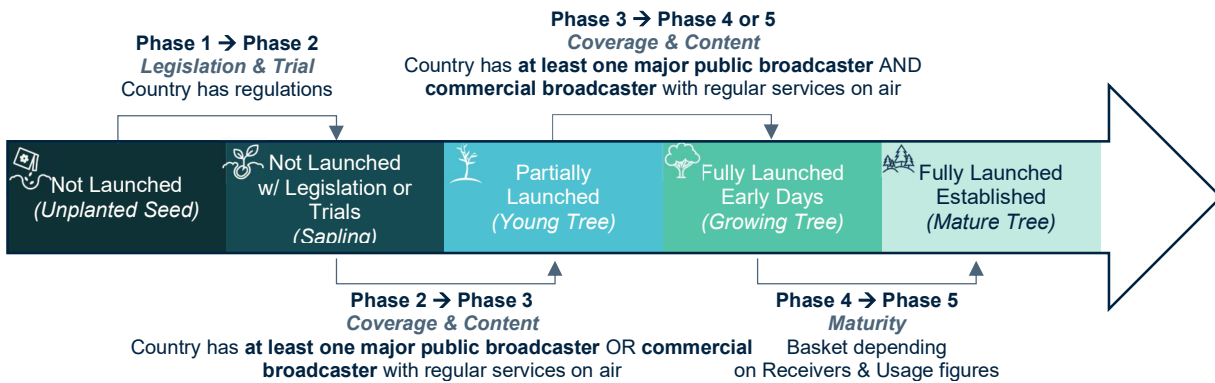
World DAB's role is both strategic and operational, providing tailored guidance and fostering collaboration to ensure successful outcomes in a wide range of markets. Support can go from **technical expertise** (Offering guidance on network deployment, receiver standards, system design, and implementation tailored to each country's needs), to **policy and regulatory support** (Facilitating international knowledge exchange and supporting alignment with best practices to help countries define and implement effective regulatory frameworks), to **cross-industry coordination** – Bringing together key national and international stakeholders (broadcasters, network operators, regulators, automotive representatives) to ensure aligned strategies and shared goals.

To maximize DAB+ success stories worldwide, WorldDAB aims to focus proactive efforts on countries with a high prospect of success. **We defined success as “growing to the next phase in DAB+ maturity”**. We therefore developed **five DAB+ Maturity Phases**, providing a structured method to assess and classify countries based on their level of DAB+ development.

¹ Steven Covey's circle of control framework

² **Lagging KPIs** are **outcome-based indicators** that measure the **end results** of actions or strategies

 **The DAB+ Maturity Phases** assess a country's progress in DAB+ development, considering regulations, implementation, and adoption.



DAB+ Maturity Phases

 **Phase 1 – Not Launched (Unplanted Seed):** countries that do not have DAB+ launched (neither services on air nor trials) and have no legislation in place.

 **Phase 2 – Not Launched with Legislation or Trials (Sapling):** countries that do not have services on air DAB+ launched but have either legislation or trials launched.

 **Phase 3 – Partially Launched (Young Tree):** countries that have either a major public or private broadcaster with regular services on air.

 **Phase 4 – Fully Launched Early Days (Growing Tree):** countries with at least a major public and private broadcasters with regular services on air.

 **Phase 5 – Fully Launched Established (Mature Tree):** countries with at least a major public and private broadcasters with regular services on air and one of the following:

- More than 80% of the incumbent radio stations (regional or national and public or private) converted to or created by DAB+; less than 50% of share of digital listening hours; and more than 20% of share of DAB+ listening hours.
- More than 80% of the incumbent radio stations (regional or national and public or private) converted to or created by DAB+; more than 50% of share of digital listening hours.

WorldDAB proactive efforts and resources will be directed toward countries with the highest potential for success. Therefore, first **we added countries worldwide in those 5 different phases, ranking DAB+ maturity level**. Then we **prioritized countries within each phase**. This to identify which countries within each Maturity Phase require proactive support and have the highest likelihood of success.

To ensure a **data driven approach**, countries within each phase were ranked based on key metrics that assess their market potential, economic strength, and likelihood of progress in DAB+ adoption. These metrics include:

Metric	Definition	Data source
Radio market size (USD)	Traditional radio advertising refers to audio advertising on the program service of a terrestrial radio station or network.	Data collected from Statista ³
Gross domestic product per capita (USD)	Country's economic capacity and market potential, directly influencing the success and sustainability of digital broadcasting initiatives.	Data collected from International Monetary Fund ⁴
Strategic influence on region (applicable for early phase countries)	Subjective assessment of a country's regional importance and ability to influence neighbouring markets.	Project Office subjective assessment & Steering Board validation
Prospect of success (applicable from Phase 1 to Phase 4)	Likelihood of a country progressing to the next Maturity Phase within a reasonable timeframe.	Project Office subjective assessment & Steering Board validation
Prospect of change (applicable from Phase 4 to Phase 5)	Likelihood of a country to face positive (opportunities) or negative (threats) changes in the next three years.	Project Office subjective assessment & Steering Board validation

As a result, based on their significant radio market size and high likelihood of success, **a maximum of twenty countries was selected where WorldDAB should focus proactive efforts** (This excludes 6 countries where DAB+ is already fully launched and established). In addition, the five DAB+ Maturity Phases were ranked according to the level of proactive involvement required from WorldDAB.

Phase	Europe	MENA	Africa	Asia	Oceania
4 – Fully Launched Early Days	France Italy Sweden Czechia	Saudi Arabia Kuwait			
3 – Partially Launched	Spain Austria Poland Croatia	Tunisia Bahrain			
2 – Not Launched with Legislation or Trials	Portugal Greece		Kenya Ghana	Thailand Indonesia	

³ Source : <https://www.statista.com/outlook/amo/advertising/audio-advertising/traditional-radio-advertising/worldwide>

⁴ Source : <https://www.imf.org/en/Publications/WEO/weo-database/2024/April/download-entire-database>

5 – Fully Launched Established	Germany United Kingdom Belgium Netherlands Denmark				Australia ⁵
1 – Not Launched	Romania			Malaysia	

Note: Phases are ranked based on the level of proactivity involvement required

This prioritization method will guide the Project Office in determining which countries we should be proactive on. However, we want to ensure that excellent reactive support is given to everyone (see further). As well, this does not prevent flexibility in decision-making, as context and strategic implications may sometimes require deviating from the prioritization. Ultimately, this strategy serves as guideline to optimize resource allocation and support countries effectively. Details on the countries eligible for proactive support and those receiving reactive support from WorldDAB can be found in the Prioritization Excel and Strategy PowerPoint files developed during this strategy exercise.

2.2. What proactive support means

Because data-driven analysis shows that certain countries have a higher chance in creating DAB+ success stories (moving up a phase in DAB+ maturity), the project office aims to be more proactive on those countries.

To provide structure and clarity (see section 8.1.1. *Description of the approach*), the proactive actions are grouped into five key categories:

- a. **Membership:** In priority countries, we aim to proactively expand engagement by recruiting new members, inviting stakeholders to join WorldDAB working groups, and potentially inviting key opinion leaders into the Steering Board.
- b. **Local presence:** In priority countries, we aim to proactively strengthen in-country visibility through participation in and organization of meetings and events.
- c. **Collaboration & marketing:** In priority countries, we aim to proactively partner with national promotion bodies to drive awareness and foster industry collaboration.
- d. **Data gathering:** In priority countries, we aim to proactively assist in the collection and analysis of relevant market data to support informed decision-making.
- e. **Legislation:** In priority countries, we aim to proactively provide guidance on regulatory frameworks, supporting countries in drafting policies, and facilitating approval processes.

Among these, **Collaboration & Marketing** and **Regulations** have been identified by the Steering Board as the most impactful levers for driving DAB+ growth. Building a **strong business case** and providing tailored **regulatory support** have proven to be two of the most effective ways WorldDAB can accelerate adoption.

⁵ Exception: In Australia's capital cities, which account for 66% of the population, the 80% threshold has been met. The potential for DAB+ in other towns and areas is being investigated

In addition to being strategically targeted, these proactive actions are deeply aligned with three of WorldDAB's strategic enablers – the **3 Cs**: *Coverage*, *Content*, and *Communication*. They ensure that national initiatives are not only technically sound but also market-driven and well-promoted.

To track progress in a practical and meaningful way, and to guide the project office, **we defined leading KPIs for each Maturity Phase**. These KPIs are within the circle of control of the Project Office – making them more actionable and responsive than lagging KPIs⁶. The country-specific proactive actions are detailed in sections *6. European strategy* and *7. New markets strategy – MENA, Asia, and Africa*.

2.3 How we support non-prioritized countries

While this strategy defines 26 countries for proactive support, WorldDAB remains committed to supporting **all countries interested in developing DAB+**. Countries not included in the proactive focus will continue to receive **reactive support** from the Project Office.

This reactive support means that WorldDAB will remain responsive to requests from these countries – providing technical guidance, regulatory advice, stakeholder connections, and other forms of assistance when approached. Though resources may not be proactively deployed toward them, these countries are **not excluded** from the strategy. Instead, they will benefit from WorldDAB's broader activities, knowledge-sharing platforms, and case study dissemination.

By balancing **proactive focus** with **reactive responsiveness**, WorldDAB ensures that its global mission remains inclusive, while strategically allocating its resources to generate the highest possible impact.

3. One goal: increasing DAB+ success stories worldwide

WorldDAB has consistently supported its member countries through every stage of DAB+ development – from initial trials to full-service launch and, in some cases, digital switchover (DSO).



We have one clear definition of success: when a country advances to a higher DAB+ Maturity Phase – digital switchover is one milestone, but not the only goal.

DAB+ success means:

- A country launching regulation or trials
- A country launching partially with a major public or private broadcaster
- A country launching fully with regular services on air
- A country becoming established in DAB+
- ...

⁶ **Lagging KPIs** are **outcome-based indicators** that measure the **end results** of actions or strategies, confirming whether objectives were achieved

By prioritizing countries with a high prospect of success, we prioritize the creation of more DAB+ success stories, which in turn will increase the number of countries moving up a phase in DAB+, which in turn creates more success stories. We start to feed the **DAB+ flywheel**.

Importantly, WorldDAB is committed not only to showcasing national success stories, but also to **championing the achievements of individual broadcasters** – particularly within mature DAB+ markets. For example, in the UK, both the BBC and commercial broadcasters have been at the forefront of DAB+ innovation and expansion, launching new digital-only stations and investing in listener engagement and content diversity. In Germany, ARD and Deutschlandradio have played a critical role in driving forward regional coverage, multi-platform integration, and high-quality digital content. By highlighting such broadcaster-level successes, WorldDAB ensures that valuable lessons, strategies, and innovations are shared widely, offering practical inspiration to peers across all stages of DAB+ adoption.

4. A segmented approach per region

4.1. European⁷ strategy: *Strong progress, renewed momentum*

Between 2022 and 2025, **DAB+ adoption in Europe has advanced steadily**. Coverage has expanded, regulations have strengthened, and listener engagement continues to grow. Western Europe now counts several well-established DAB+ markets, with Switzerland switched-off in 2024 and France completing its national DAB+ launch in 2023 – clear signs of a broader digital shift. The **European Electronic Communications Code (EECC) has been widely implemented**, with over 95% of new cars in the EU equipped with DAB+. Consumer receiver penetration rose to 44% by 2022, and DAB+ now reaches 65% of the European population.

Challenges remain, particularly in markets where coverage and engagement are still developing. **Streaming competition, cost pressures, and evolving industry dynamics** highlight the importance of staying proactive. Yet with continued collaboration, tailored support, and a strong foundation, Europe is well-positioned to make DAB+ the backbone of future radio.

We propose prioritizing proactive efforts as an organization to the following European countries:

Phase 4 Fully Launched Early Days	Phase 3 Partially Launched	Phase 2 Not Launched w/ Legislation/Trials	Phase 5 Fully Launched Established	Phase 1 Not Launched
France Italy Sweden	Spain Austria Poland	Portugal Greece	Germany United Kingdom Belgium	Romania

⁷ This section also includes Australian strategy as its Maturity Phase is similar to most European countries. In Australia's capital cities, which account for 66% of the population, the 80% threshold has been met. The potential for DAB+ in other towns and areas is being investigated

Czechia	Croatia		Netherlands	
			Denmark	

To translate this into concrete steps, **detailed one-pagers** have been developed **for each prioritized country**. These one-pagers outline the proactive actions identified by the Project Office and validated by the Steering Board, along with the countries' DAB+ status. The full set of one-pagers can be found in the Appendix.

4.2. New markets strategy – MENA: *Expanding reach, emerging potential*

Over the past three years (2022 – 2025), **DAB+ adoption in the MENA region has gained momentum**, driven by regulatory mandates, infrastructure expansion, and growing broadcaster interest. Several countries have introduced receiver regulations, ensuring that new home, portable, and vehicle radios support DAB+, aligning with global digital broadcasting trends. **Coverage has expanded significantly**, with some markets reaching near-complete population coverage, while others continue trial phases or early-stage rollouts. Governments in the region are increasingly seeing DAB+ as a long-term solution, with discussions around phasing out FM transmissions in favour of digital alternatives. In the automotive sector, regional harmonization efforts have led to **new regulations mandating DAB+ in vehicles**, ensuring consistent digital radio availability across borders. However, broadcaster engagement varies, with some fully embracing the technology, while others remain cautious due to cost considerations and evolving listener habits.

The MENA region is making **steady progress in establishing DAB+ as a core part of its radio landscape**, benefiting from improved audio quality, greater content diversity, and enhanced regulatory support.

We propose prioritizing proactive efforts as an organization to the following MENA countries:

Phase 4 Fully Launched Early Days	Phase 3 Partially Launched	Phase 2 Not Launched w/ Legislation/Trials	Phase 5 Fully Launched Established	Phase 1 Not Launched
Saudi Arabia Kuwait	Tunisia Bahrain			

To translate this into concrete steps, **detailed one-pagers** have been developed **for each prioritized country**. These one-pagers outline the proactive actions identified by the Project Office and validated by the Steering Board, along with the countries' DAB+ status. The full set of one-pagers can be found in the Appendix.

4.3. New markets strategy – Asia: *Early steps, growing interest*

In Asia, DAB+ adoption has advanced meaningfully over the 2022–2025 period, with several countries moving from exploratory interest to structured pilot activities. **Thailand, Indonesia, and Malaysia** are leading the way, having launched or expanded technical trials, initiated regulatory discussions, and engaged with local broadcasters and automotive sectors. DAB+ is increasingly seen as a key enabler of broader digital agendas

– including smart city initiatives, digital economy frameworks, and national infrastructure upgrades. This alignment strengthens DAB+’s strategic value, especially as governments look to modernize public broadcasting and enhance spectrum efficiency.

While challenges such as market fragmentation and uneven infrastructure remain, the region shows strong signs of sustained progress – with DAB+ positioned as a critical component of Asia’s digital media future.

We propose prioritizing proactive efforts as an organization to the following MENA countries:

Phase 4 Fully Launched Early Days	Phase 3 Partially Launched	Phase 2 Not Launched w/ Legislation/Trials	Phase 5 Fully Launched Established	Phase 1 Not Launched
		Thailand Indonesia		Malaysia

To translate this into concrete steps, **detailed one-pagers** have been developed **for each prioritized country**. These one-pagers outline the proactive actions identified by the Project Office and validated by the Steering Board, along with the countries’ DAB+ status. The full set of one-pagers can be found in the Appendix.

4.4. New markets strategy – Africa: *Laying foundations, building momentum*

Across Sub-Saharan Africa, **the momentum for DAB+ is growing** as several countries take their first steps toward digital radio adoption. Countries like **Kenya** and **Ghana** have demonstrated increased interest, supported by public and private stakeholders, in exploring the benefits of digital terrestrial broadcasting. These early initiatives have included regulatory consultations, awareness campaigns, and the first pilot projects. Regional collaboration is beginning to form, especially through dialogue between broadcasters, network operators, and policymakers. Although infrastructure development, receiver availability, and regulatory clarity remain key challenges, there is clear potential for progress. With sustained support and stakeholder coordination, Africa is well-positioned to accelerate its digital transition in the coming years.

We propose prioritizing proactive efforts as an organization to the following MENA countries:

Phase 4 Fully Launched Early Days	Phase 3 Partially Launched	Phase 2 Not Launched w/ Legislation/Trials	Phase 5 Fully Launched Established	Phase 1 Not Launched
		Kenya Ghana		

To translate this into concrete steps, **detailed one-pagers** have been developed **for each prioritized country**. These one-pagers outline the proactive actions identified by the Project Office and validated by the Steering Board, along with the countries’ DAB+ status. The full set of one-pagers can be found in the Appendix.

5. Efforts on the Consumer Market

To ensure the long-term success of digital radio, WorldDAB must look beyond infrastructure and regulation – **consumer adoption is equally critical**. Strengthening receiver sales, particularly tabletop radios, is essential to anchoring DAB+ in daily listening habits (aligned with the WorldDAB’s strategic enabler: *Consumer devices*). The following ambition and strategic direction outline how WorldDAB aims to support this vital part of the DAB+ ecosystem.

To strengthen the consumer market for DAB+ and increase receiver sales – particularly tabletop radios – WorldDAB focuses on three key strategic directions, each designed to improve awareness, understanding, and accessibility of DAB+ for listeners.

Build a unified DAB+ brand

A single, recognizable DAB+ logo across all communications reinforces trust and recognition. WorldDAB encourages consistent branding across countries and campaigns to help position DAB+ as a modern and reliable technology. Unified visual identity is a foundation for effective communication and cross-market impact.

Leverage partnerships with crisis response organizations

Partner with national emergency and civil protection agencies to position DAB+ as a vital tool for crisis communication. In a world facing growing political and climate uncertainty, this reinforces DAB+ as a reliable, must-have technology for national resilience.

Empower consumers with a reason to choose DAB+

WorldDAB supports national marketing bodies in developing impactful campaigns that raise awareness of DAB+ receivers and drive adoption. At the heart of these efforts is a clear, compelling message that answers the consumer question: “Why should I buy a DAB+ radio?” – highlighting exclusive content, superior sound, reliable access, and digital innovation.

Boost retail support for DAB+

In countries where cost is perceived as a barrier, WorldDAB promotes pricing education and messaging focused on long-term value. Emphasizing benefits such as free-to-air access, content variety, and device longevity helps reframe the purchase as a smart investment.

Sharing what works

To reinforce these strategic directions, WorldDAB will continue to showcase successful national examples—such as bundling strategies, retail partnerships, or marketing campaigns – so countries can learn from each other’s successes and tailor similar approaches to their local context.

Together, these efforts will support the creation of a stronger and more sustainable consumer ecosystem for DAB+, ensuring that more listeners choose and value digital radio in their everyday lives.

To illustrate how the strategy is translated into concrete steps, **a detailed scorecard** has been developed. The receiver sales scorecard can be found in the Appendix.

6. Continued focus on Automotive

6.1. Ambitions for the automotive sector by 2030

To achieve its goals in the automotive sector by 2030, the Steering Board and Project Office have defined **two core ambitions** for WorldDAB (aligned with the WorldDAB's strategic enabler: *Cars*). Each ambition is supported by **two strategic levers** – these describe the key behaviors and policy shifts required to reach the goals.

Ambition 1 – We aim to increase the number of cars with DAB+ worldwide

Reaching this ambition will be supported by two levers:

1. Lever 1.1: Lobby for legislation

All new cars should include (digital terrestrial) broadcast radio.

By 2030, broadcast radio should be mandatory in cars (category M⁸ and N⁹).

The existing European legislation should be enforced and exported outside Europe:

- For any country formulating policies: ensure regulations include mandates for DAB vehicles.
- For early-phase countries: advocate for car legislation concurrent with DAB policy development.

2. Lever 1.2: Pitch the value of DAB+

DAB+ should not be perceived as an extra cost for OEMs, but as valuable for cars because of:

- Its emergency services (on highways, and in tunnels).
- Its good road network coverage.
- Its maturing market with new and exciting services.

Ambition 2 – All cars with DAB+ should provide a great user experience

Reaching this ambition will be supported by two levers:

1. Lever 2.1: Ensure prominence of broadcast radio

For the description, see Action 1 of Ambition 1.

2. Lever 2.2: Ensure consistency and alignment among DAB+ experience with OEMs

By 2030:

- All cars should comply with minimum UX requirements.
- All cars should support easy update of logo.

6.2. Automotive proactive actions (to reach the ambition)

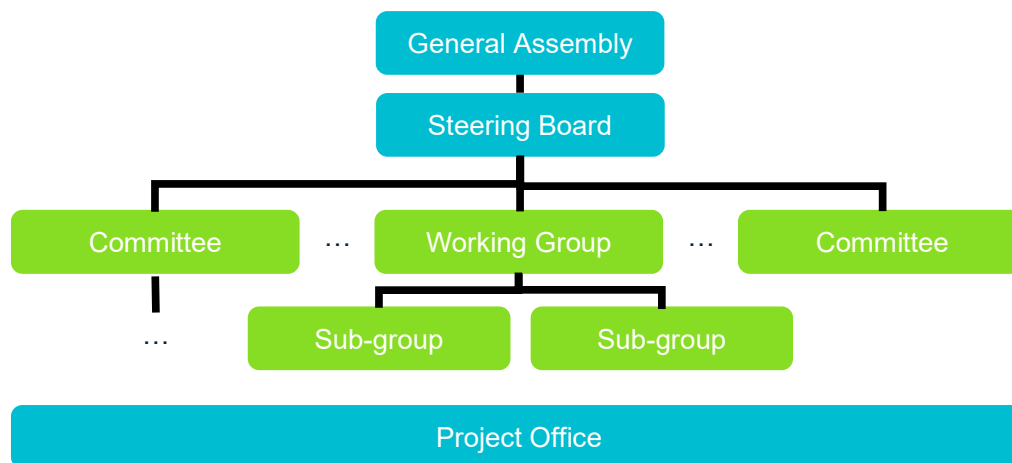
In addition to defining the ambitions and their supporting levers, the Steering Board and Project Office outlined a set of concrete, proactive actions to achieve these goals: increasing the number of cars equipped with DAB+ and ensuring an outstanding user experience. To illustrate how the strategy is translated into concrete steps, **detailed scorecards** have been developed. The full set of automotive scorecards can be found in the Appendix

⁸ M: Passenger car

⁹ N: Light Commercial Vehicle

7. Strengthening the governance framework for effective execution

7.1. Current Steering Board structure



Governance structure of WorldDAB¹⁰

WorldDAB operates under a structured governance framework defined by its Statutes, designed to support its mission of promoting DAB+ digital radio. The governance system is composed of the **General Assembly**, the **Steering Board**, various **Committees and Working Groups**, and the **Project Office**, each with specific responsibilities, membership, and decision-making processes. Below is an overview of each group, including its membership composition, decision-making authority, and meeting frequency:

Group	Membership	Decision-making	Meeting frequency
General Assembly	All member organisations of WorldDAB	Supreme authority: endorses appointments, approves budget, amends statutes	Annually, alongside Annual Summit
Steering Board	Elected representatives (officers, 15 members, chairs, ex-officio, co-opted)	Makes strategic and operational decisions, reports to General Assembly	4 times a year (2 in person and 2 virtual) + additional as needed

¹⁰ For more information on the governance of WorldDAB, refer to the WorldDAB Governance Manual

Committees and working groups • <i>Finance Committee</i> • <i>Technical Committee</i> • <i>Spectrum and Network Implementation Committee (SNIC)</i> • <i>Automotive working group (incl. UX Group and Aftermarket Devices Group)</i> • <i>Marketing Group</i>	Appointed by the Steering Board; chairs approved by Steering Board	Executes tasks at request of Steering Board Committees: long-term and strategic focus Working groups: short-term, topic-specific deliverables	Variable; depends on scope and setup
Project Office	Project director, staff, and consultants	Handles daily administration and implementation of Steering Board decisions	Ongoing

7.2. Ideal Steering Board for 2028-strategy execution

To effectively deliver on the ambitions outlined in the 2028 strategy, the Steering Board must be equipped with the right composition, capabilities, and principles of representation. The following measures are proposed to enhance the structure and functioning of the Steering Board:

- **Representation Guideline: “one representative per company”**

To promote broader engagement and reduce concentration of influence, WorldDAB will encourage – through advice rather than formal mandate – the principle of “one representative per company.” This approach aims to maximize the diversity of perspectives around the table and create space for underrepresented voices.

- **Diversity Statement: “active aspiration to strive for balanced representation”**

The next Steering Board election invitation will include a clear statement of intent: *“WorldDAB aspires to a healthy representation of diversity, including gender, regional, and sectoral balance.”* This commitment reinforces the importance of inclusivity and encourages a broader range of candidates to participate.

- **Talent Outreach: “actively stimulating talent from priority regions to join the Steering board”**

The Project Office – and where appropriate, current Steering Board members – should take an active role in identifying and encouraging new talent across regions and sectors to stand for Steering Board election. This will help inject fresh perspectives and ensure the Board reflects the evolving needs of WorldDAB’s strategic agenda.

Together, these measures will strengthen the Steering Board's ability to guide WorldDAB through a critical phase of global DAB+ growth, while aligning with the values of transparency, diversity, and strategic effectiveness

7.3. Reporting Mechanisms: From President & Project Office to Steering Board

To ensure transparency, strategic alignment, and continuous monitoring of the 2028 strategy, regular reporting from both the Steering Board President and the Project Office Director is essential. Each will focus on different dimensions of progress using defined KPIs, timelines, and reporting tools.

7.3.1. WorldDAB President to the Steering Board

Objective

The President provides a **high-level strategic update** on the overall progress of the WorldDAB 2025–2028 strategy. The goal is to assess whether WorldDAB is on track to achieve its long-term ambitions, by presenting the evolution of **lagging KPIs** and **external reference data** (e.g., GfK and JATO studies). The President also plays a key role in highlighting success stories – from countries, broadcasters, or initiatives – that create value, inspire action, and reinforce WorldDAB's mission.

Frequency

Twice a year, aligned with Steering Board meetings (June/December)

Scope and content

The President

- Showcases impactful success stories from countries, initiatives, or broadcasters that exemplify strategic progress or innovation
- Presents an overview of lagging KPIs aligned with the three strategic pillars: Strengthen the core, Expand to New Markets, Secure Automotive.
- Provides analysis of key external data sets (e.g., car receiver sales from JATO, consumer DAB+ radio sales from GfK)

Format and supporting materials

Slide deck:

- **Slide 1:** Strategy overview – recap of the WorldDAB strategic pillars and Maturity Phase framework
- **Slides 2–3:** “In the Spotlight” – country, broadcaster, or initiative success stories that demonstrate tangible progress and impact

- **Slides 4–6:** Strategic Pillars – one slide per pillar with updates on lagging KPIs and key developments (slides to be prepared with input from the Project Office, based on the Prioritization Excel)
- **Slide 7:** External data snapshot – evolution of GfK and JATO numbers (e.g., radio receiver sales, car integration trends)

President reporting template can be found in the Strategy PowerPoint developed during this strategy exercise.

7.3.2. Project Office Director to the Steering Board

Objective

The Project Office Director leads the **operational reporting**, focusing on **leading KPIs** – metrics that reflect actionable progress and day-to-day implementation of WorldDAB's strategy. These KPIs track efforts directly under the control of the Project Office, allowing the Steering Board to monitor delivery, identify obstacles, and provide support where needed. This includes reporting on both **country-level actions** and the **automotive strand** of the strategy.

Frequency

Quarterly, aligned with Steering Board meetings (March/June/September/December)

Scope and content

The Project Office Director will report on the evolution of leading KPIs across prioritized and non-prioritized countries, organized by DAB+ Maturity Phase and by Project Office working dimensions. The update is operational and focused on the activities and progress **within the Project Office's circle of control** – providing transparency on where proactive efforts are delivering results or facing challenges.

Leading KPIs will be presented along the following working dimensions:

- **Membership:** membership evolution, Steering Board nominations.
- **Data Gathering:** data collection progress, key market data availability.
- **Collaboration & Marketing:** business case sharing, committees/working groups representation.
- **Local Presence:** check-in meetings, events attended or organized.
- **Legislation:** regulatory progress, draft policies.
- **Automotive:** progress against the two automotive ambitions, leading KPIs by lever.
- **Communication:** develop and promote the DAB+ business case through the website, newsletters, and event presentations.

This structured view ensures reporting respects both the **phase-based structure of the strategy** and the **operational dimensions of the Project Office's mandate**.

Format and supporting materials

Slide deck:

- 1-2 slides per working dimension.
- Content organized per DAB+ Maturity Phase and per leading KPI.
- For each KPI, the Project Office provides a comment summarizing the most relevant and noticeable actions or progress.
- The Project Office Director presents the progress made over the last 3 months; each Project Office working dimension lead contributes to their respective section of the deck.

Country Scorecards (Appendix):

- As the strategy is a **living document**, the “Comments” section of each country’s scorecard will be updated by the Project Office each quarter
- Updated scorecards will be included in the **Appendix** of the Steering Board presentation – not for plenary discussion, but to provide a transparent and complete record of country-level progress.

Project Office Directory reporting template can be found in the Strategy PowerPoint developed during this strategy exercise.

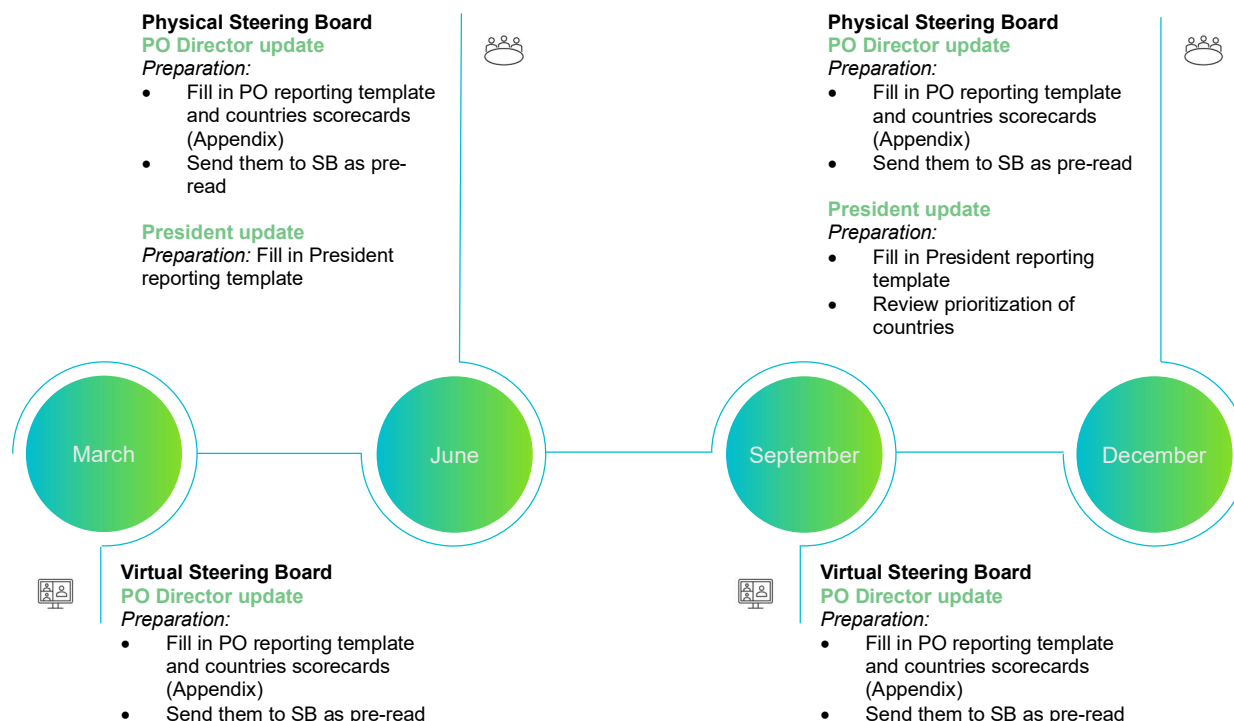
7.4. Strategy review and governance

7.4.1. Governance of the strategy

To ensure the WorldDAB 2025–2028 strategy remains relevant, actionable, and aligned with evolving market conditions, it is treated as a **living document**. The strategy will be reviewed and updated at least once a year, under the joint responsibility of the Project Office and the Steering Board.

Key moments for review include:

- **Annual review:** A strategic review will be conducted annually to assess progress, integrate new insights, and adjust priorities as needed (see 6.3. *Reporting Mechanisms: From Project Office & President to Steering Board*).
- **Quarterly checkpoints:** Operational progress updates (focused on leading KPIs and proactive actions) will inform tactical refinements.
- **Exceptional updates:** In case of major macroeconomic, technological, or political shifts, the strategy may be updated outside the regular schedule.



Strategy governance timeline

All updates will be validated by the Steering Board and documented accordingly.

7.4.2. Supporting resources

Several resources have been developed to support the implementation and monitoring of this strategy. These documents serve as reference tools for both strategic decision-making and operational execution:

- **Prioritization Excel:** A structured database that consolidates all country-level KPIs, including both leading and lagging indicators¹¹. It also includes prioritization rankings, Maturity Phase classifications, and tracking of proactive actions per country.

¹¹ **Lagging KPIs** are **outcome-based indicators** that measure the **end results** of actions or strategies, confirming whether objectives were achieved

[illegible]

- **Strategy PowerPoint:** A slide deck containing all visuals, frameworks, country and automotive scorecards, and workshop outputs used to build the strategy. It can be used for presentations and high-level Steering Board discussions.

Figure 1 displays a collage of 8 slides from the World DAB Strategy exercise, illustrating the process of prioritization and proactive support for DAB maturity phases.

- Slide 1:** WorldDAB - Strategy exercise, June 2020. Presented by Jari Vanhaverbeke & Corinne Giffels.
- Slide 2:** Agenda for the strategy exercise, including:
 - How will Brightwolves help?
 - DAB maturity phases, definition and countries classification
 - 2-way prioritization: between and within the phase
 - Assess and proactive actions definition
 - Administrative conditions and corresponding actions
 - Decision rules proactive actions
 - Steering board governance & reporting
- Slide 3:** Prioritization model and proactive support lead to more effective resources allocation. Key point: By prioritizing, we focus our proactive efforts on countries where we can create significant DAB+ success stories, balanced across different regions in the world.
- Slide 4:** Strategy exercise with World DAB planning. Timeline from 2020 to 2025, showing phases: Phase 1 (Not Launched), Phase 2 (Not Launched but Legislation/Trials), Phase 3 (Partially Launched), and Phase 4 (Fully Launched).
- Slide 5:** Agenda for the project office's Excel file, including:
 - How will Brightwolves help?
 - DAB maturity phases, definition and countries classification
 - 2-way prioritization: between and within the phase
 - Assess and proactive actions definition
 - Administrative conditions and corresponding actions
 - Decision rules proactive actions
 - Steering board governance & reporting
- Slide 6:** The Project Office's Excel file was completed with the market size per country. Shows a screenshot of the Excel file with columns for Country, Market Size, and other metrics.
- Slide 7:** 5 DAB Maturity Phases. Diagram showing the progression from Phase 1 (Not Launched) to Phase 5 (Fully Launched).
- Slide 8:** Phase 1 - Not Launched (Unplanted Seed). Table listing countries in Phase 1, categorized by Region (Europe, Asia, Africa).

- Strategy Word Document (this document):** This document provides the full narrative and rationale of the strategy, outlining the methodology, ambitions, KPIs, and governance structure in detail.

Together, these resources ensure a consistent and data-driven implementation of WorldDAB's strategic vision.

8. Conclusion

By building on the foundations of the 2023 plan and refining its scope, this 2025–2028 strategy ensures that WorldDAB directs its efforts where they matter most, maximizing impact while making the best use of finite resources.

At the heart of the strategy lies a more targeted approach:

- **Prioritized countries** have been identified within each DAB+ Maturity Phase, based on their potential for success and the level of proactive support required. On these countries we aim to be more proactive in our approach.

- **Proactive actions** have been defined per country, serving as the operational guideline to help them progress toward the next phase and ultimately achieve DAB+ maturity.

In parallel, the **automotive sector** remains a strategic priority, with two clear ambitions: increase the number of cars equipped with DAB+ worldwide, and ensure a consistent, high-quality user experience. Each ambition is supported by strategic levers and concrete, actionable steps owned by key working groups and stakeholders.

To track progress effectively, two sets of KPIs structure the strategy:

- **Leading KPIs**, which are within the Project Office's control and monitor progress on proactive actions.
- **Lagging KPIs**, which measure the long-term impact of DAB+ development in each country and region.

Together, these priorities, actions, and measurement tools form a coherent, living strategy that will guide WorldDAB over the next three years. With shared ambition and coordinated execution, this strategy sets the foundation to elevate digital radio beyond borders.

9. APPENDIX

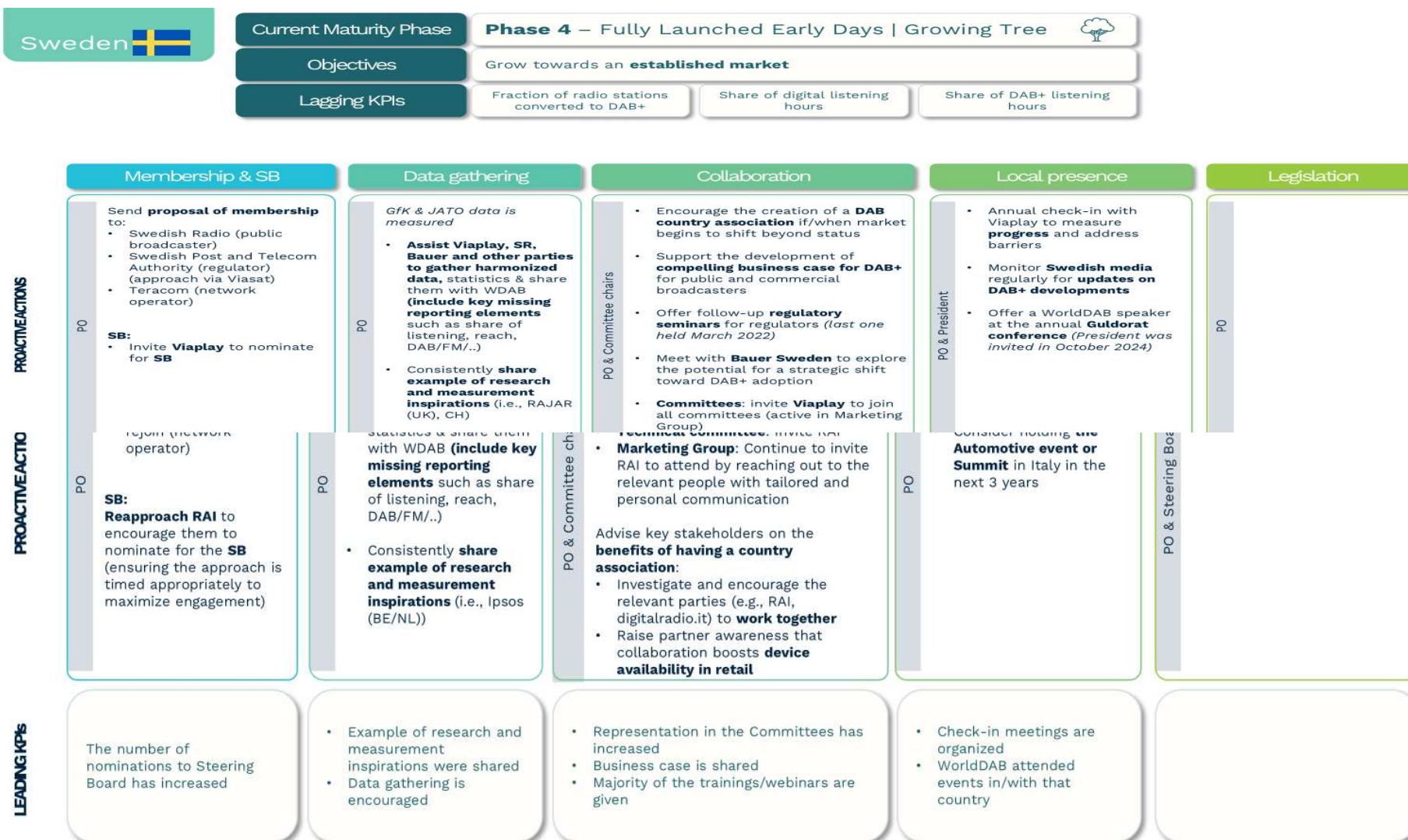
Countries scorecards (Status June 2025)

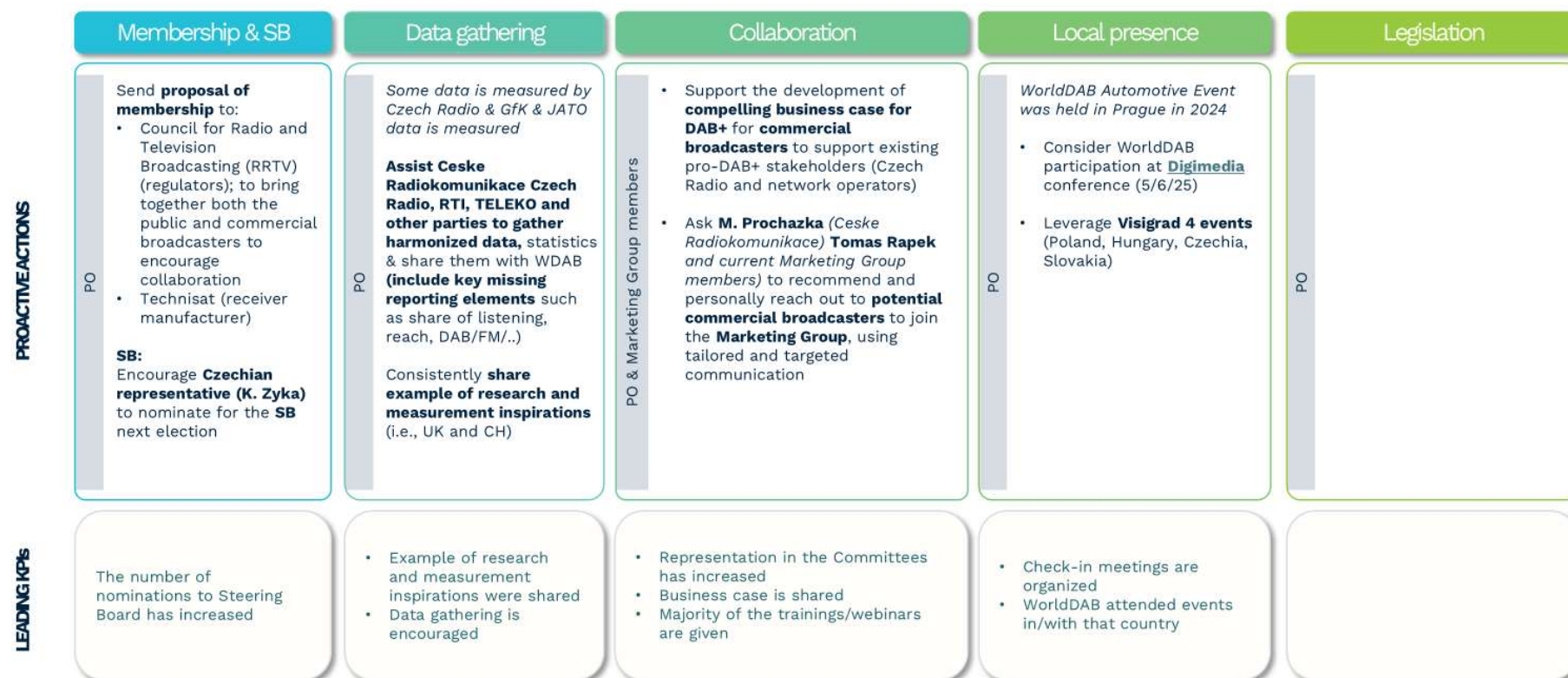
This section presents the proactive actions for each country in the form of scorecards, organized by Maturity Phase and priority level.

An editable version of these scorecards is available in the accompanying Strategy PowerPoint. The structured ranking ensures that actions are aligned with each country's stage of DAB+ development and its strategic importance.



	Membership & SB	Data gathering	Collaboration	Local presence	Legislation
PROACTIVE ACTIONS	Send membership proposal to - Stellantis/PSA Group, Groupe Renault (OEMs) - ARCOM (regulators) - Ensemble pour le DAB+ (country association) PO	Consistently encourage broadcasters (Ensemble pour DAB+) to gather data, statistics & share them with WDAB: broadcasters share research they commissioned and update their baseline Consistently share example of countries who successfully set up measurements in the past (i.e., Ipsos (BE/NL)) PO & Country manager	Proactively work with a local expert (J.M. Dubreuil) to support on marketing effort, to leverage safety systems, to focus on awareness & involvement of retail PO & Country manager Committees Marketing: Support Maelo on marketing and encourage Ensemble pour DAB+ members to join the committee Automotive: Invite Renault/Peugeot/Stellantis Aftermarket: determine if invitation should be sent to Maelo SNIC Technical: Invite TDF, Towercast (N. Croiset, TDF & M. Priem, Towercast already in TC, Jerome Hirigoyen already in SNIC) Committee chairs PO - Push with Ensemble pour le DAB+ for Automotive aftermarket training (built on other EU experiences)	- Continue to join, fund, showcase and speak at the Paris Radio Show (Radio Tour) for the next years - Attend Fête de la Radio (Ensemble pour le DAB+) - Giving visibility to French industry professionals: invite French experts to speak at WDAB events - Organize high-level bilat meeting with regulators to reaffirm existing relationship (ARCOM, Radio France & WDAB members) - Consider holding WorldDAB Summit in the next 3 years in France PO, Country manager & President	- Discuss with Steering Board members and Arcom how WDAB can support new French laws that require broadcast radio - Consider pushing for similar support at the EU level PO & Steering Board
LEADING KPIs	The number of nominations to Steering Board has increased	- Example of research and measurement inspirations were shared - Data gathering is encouraged	- Representation in the Committees has increased - Business case is shared - Majority of the trainings/webinars are given	- Check-in meetings are organized - WorldDAB attended events in/with that country	





Saudi Arabia & Kuwait

Current Maturity Phase

Phase 4 – Fully Launched Early Days | Growing Tree



Objectives

Grow towards an **established market**

Lagging KPIs

Fraction of radio stations converted to DAB+

Share of digital listening hours

Share of DAB+ listening hours

PROACTIVE ACTIONS

Membership & SB

Send **proposal of membership** to:

- Saudi Broadcasting Authority (SBA)
- Ministry of Information of Kuwait (MOI)

SB:

- *Saudi Arabia and Kuwait are represented in the **SB** by **B. Zoubi** (ASBU)*
- Invite **regulators and network operators SBA and MOI Kuwait** to nominate for the **SB** (at appropriate moment and pending positive market developments)

PO

Data gathering

- Determine **if** and **what data** is gathered
- Consistently **share example of research and measurement inspirations** (i.e., Ipsos (BE/NL), RAJAR (UK), Digitization Study (DE)) to illustrate data collection methods, costs, timing, and key metrics (reach, share, penetration, % of new cars)

PO

Collaboration

- Invite **Saudi Broadcasting Authority** to speak at WorldDAB events (invitation sent to speak at 2025 WorldDAB Automotive event)

WorldDAB/ABU/ASBU webinar series (07/25):

- Collect **key topics** and **information gaps directly** from stakeholders and through ASBU
- Prioritize these inputs to shape the **agenda webinar series**
- For 2025, include ASBU's suggested topic: **costing elements of DAB+ network design**

Marketing Group: Invite SBA to join

PO & Committee chairs

Local presence

- Attend **FOMEX** in Riyadh (19/02/25)

PO & President

Legislation

PO

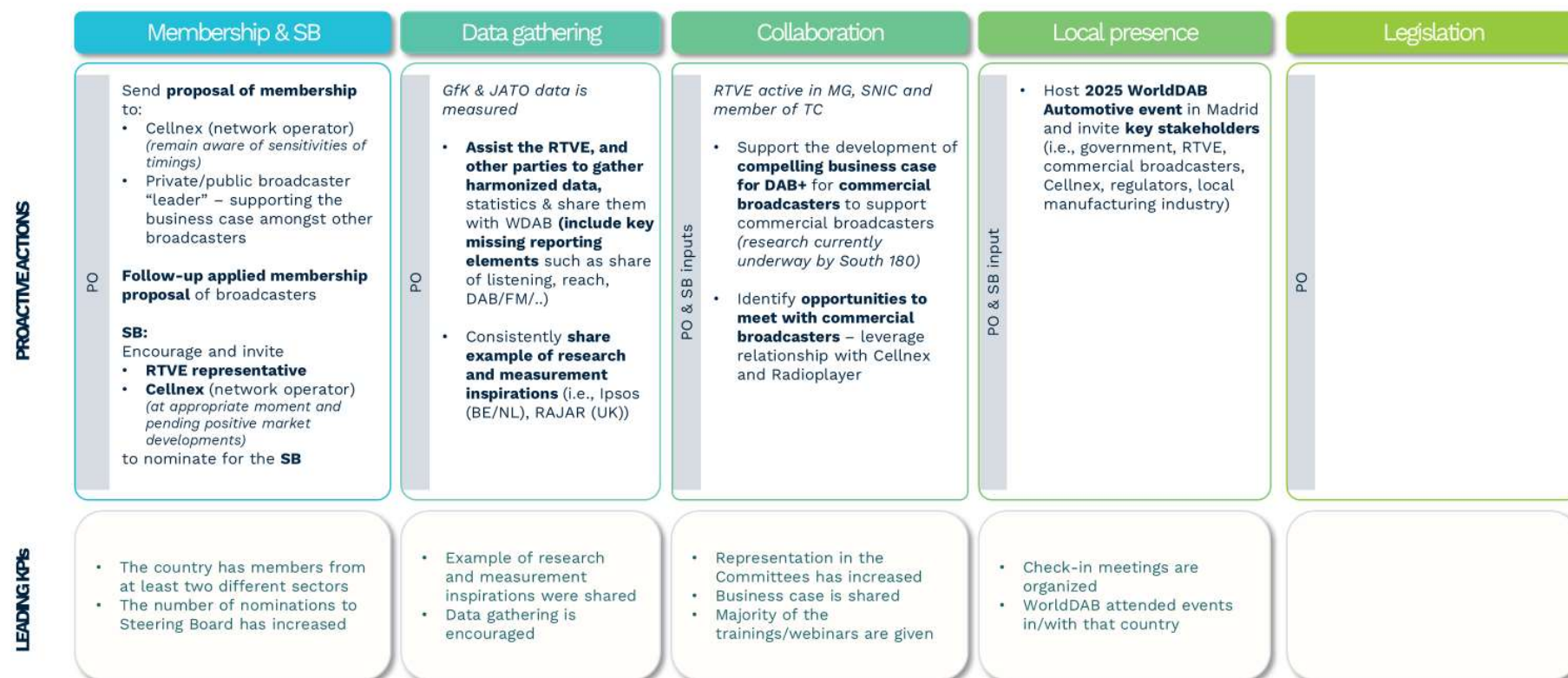
LEADING KPIs

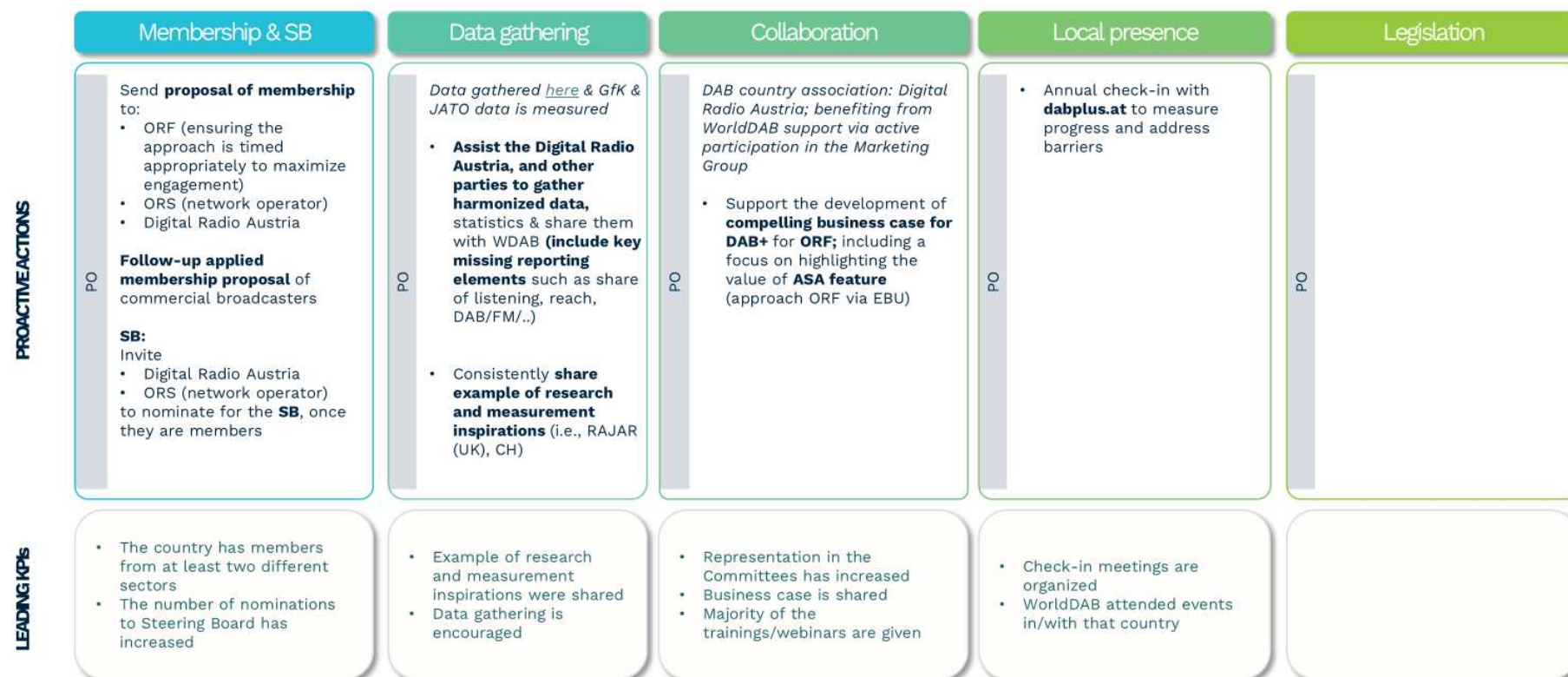
The number of nominations to Steering Board has increased

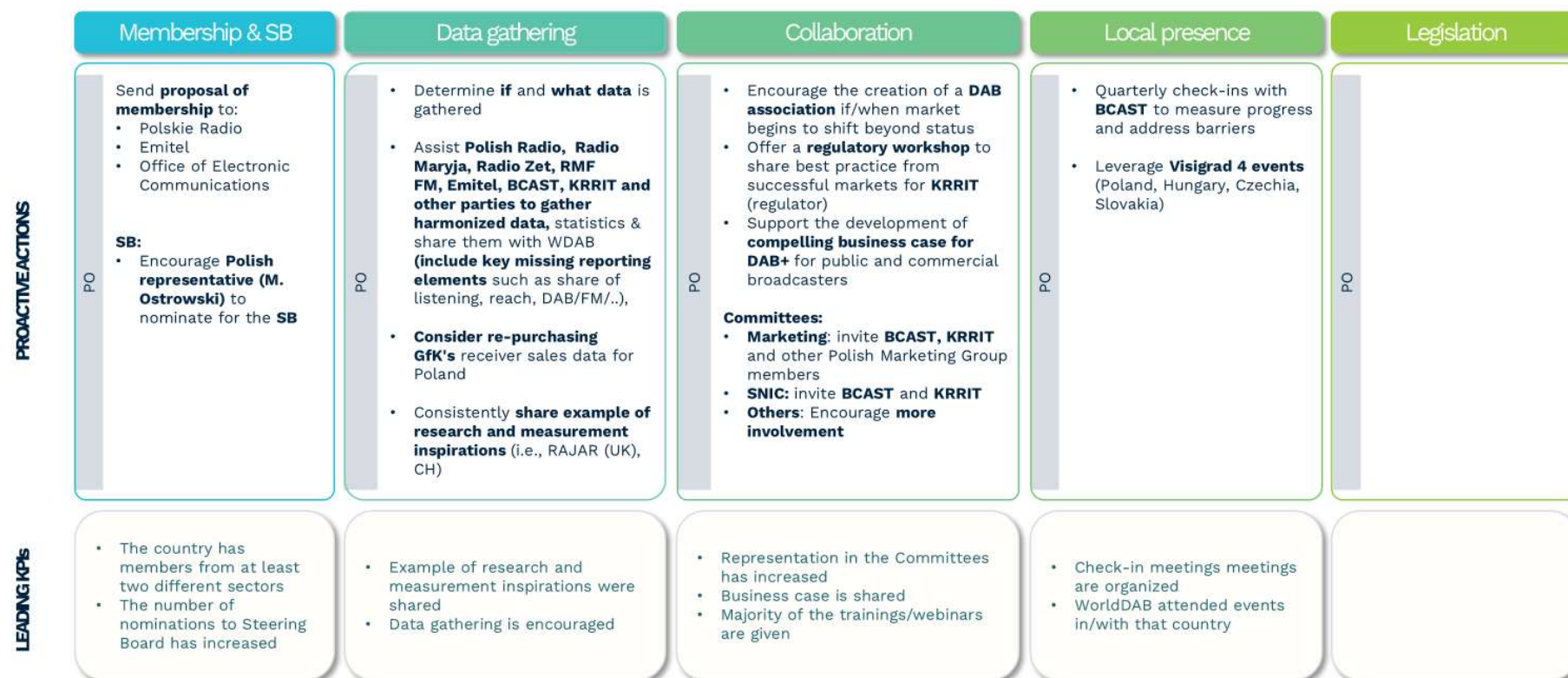
- Example of research and measurement inspirations were shared
- Data gathering is encouraged

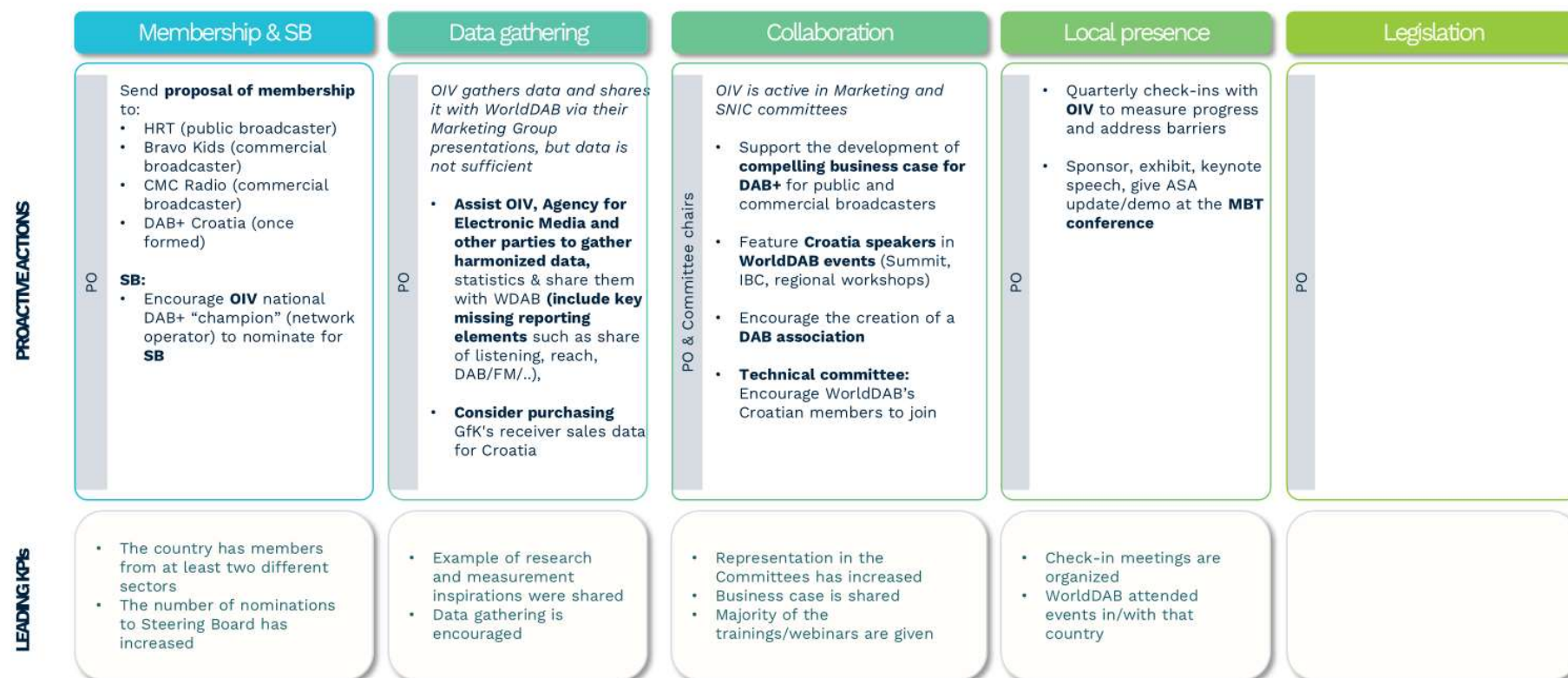
- Representation in the Committees has increased
- Business case is shared
- Majority of the trainings/webinars are given

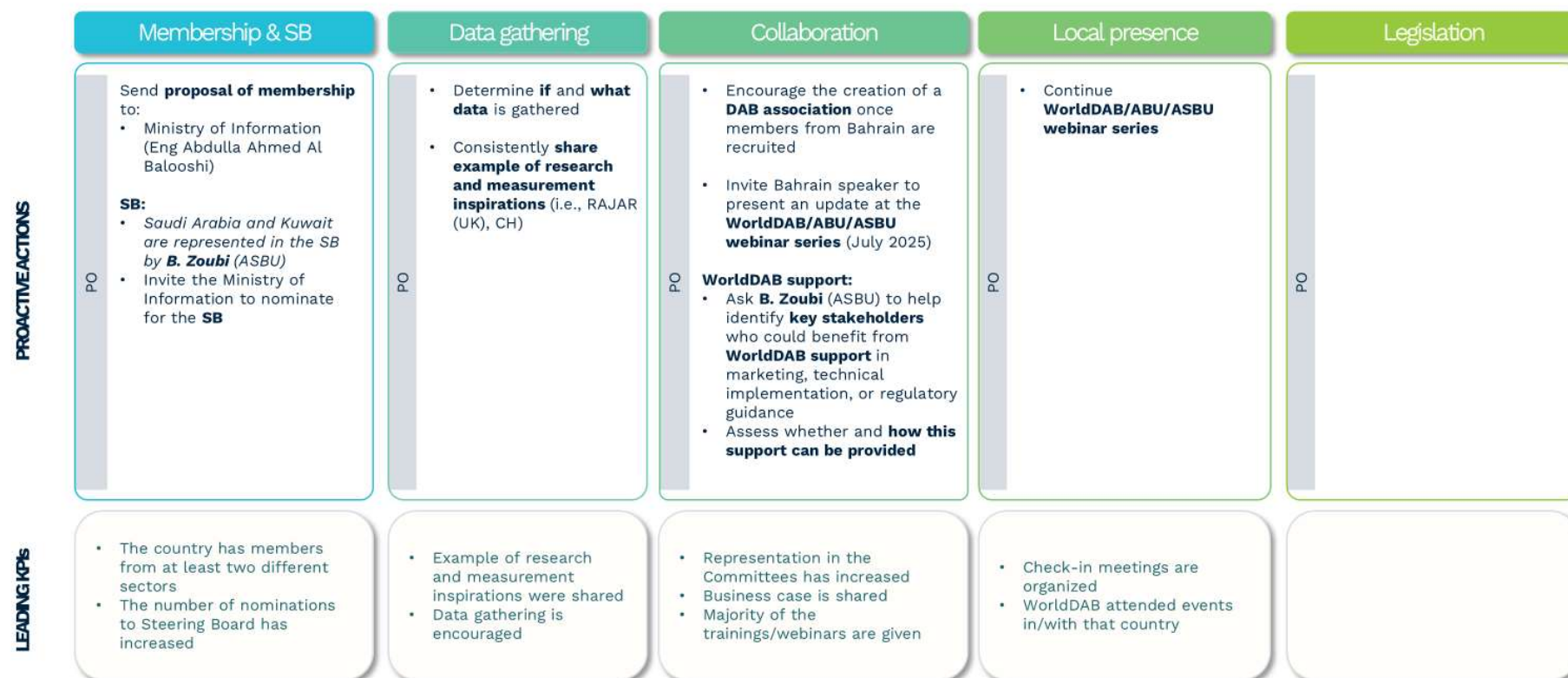
- Check-in meetings are organized
- WorldDAB attended events in/with that country

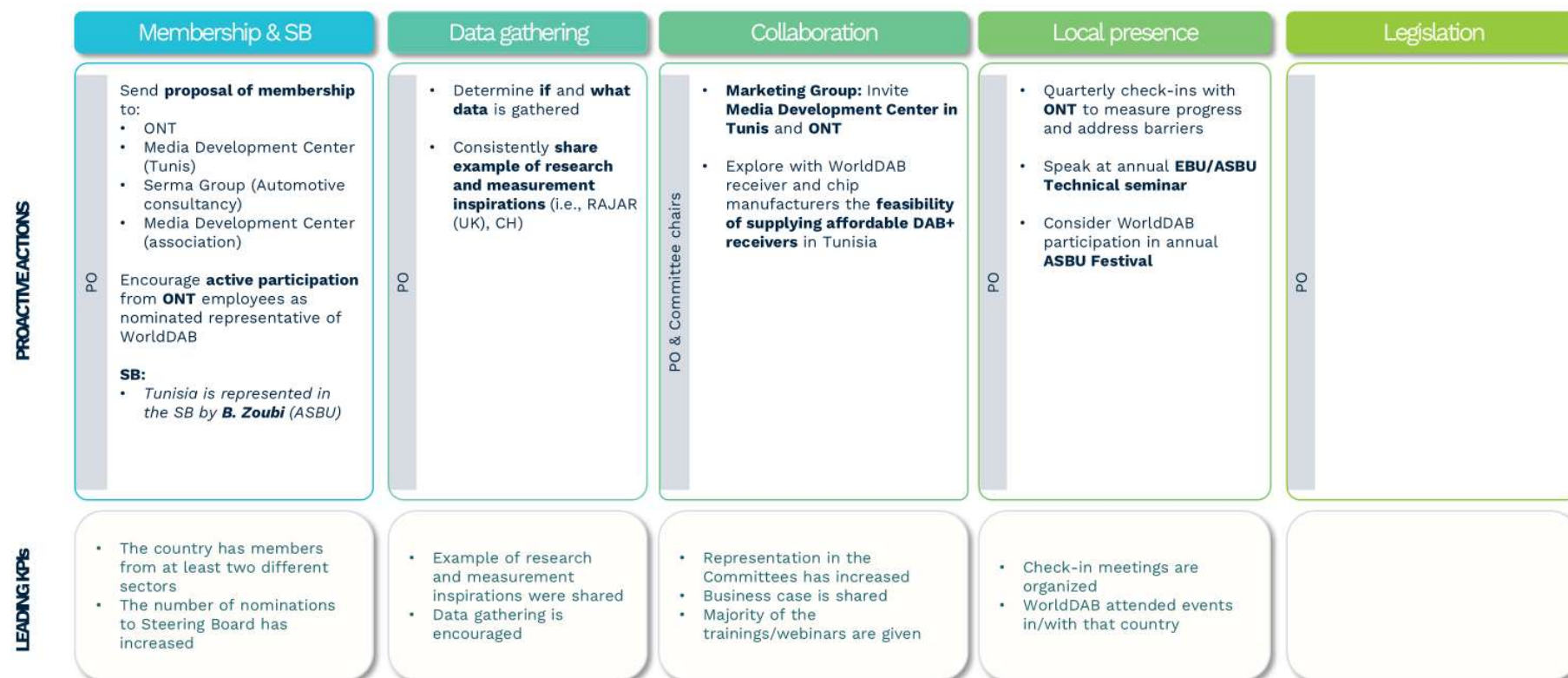


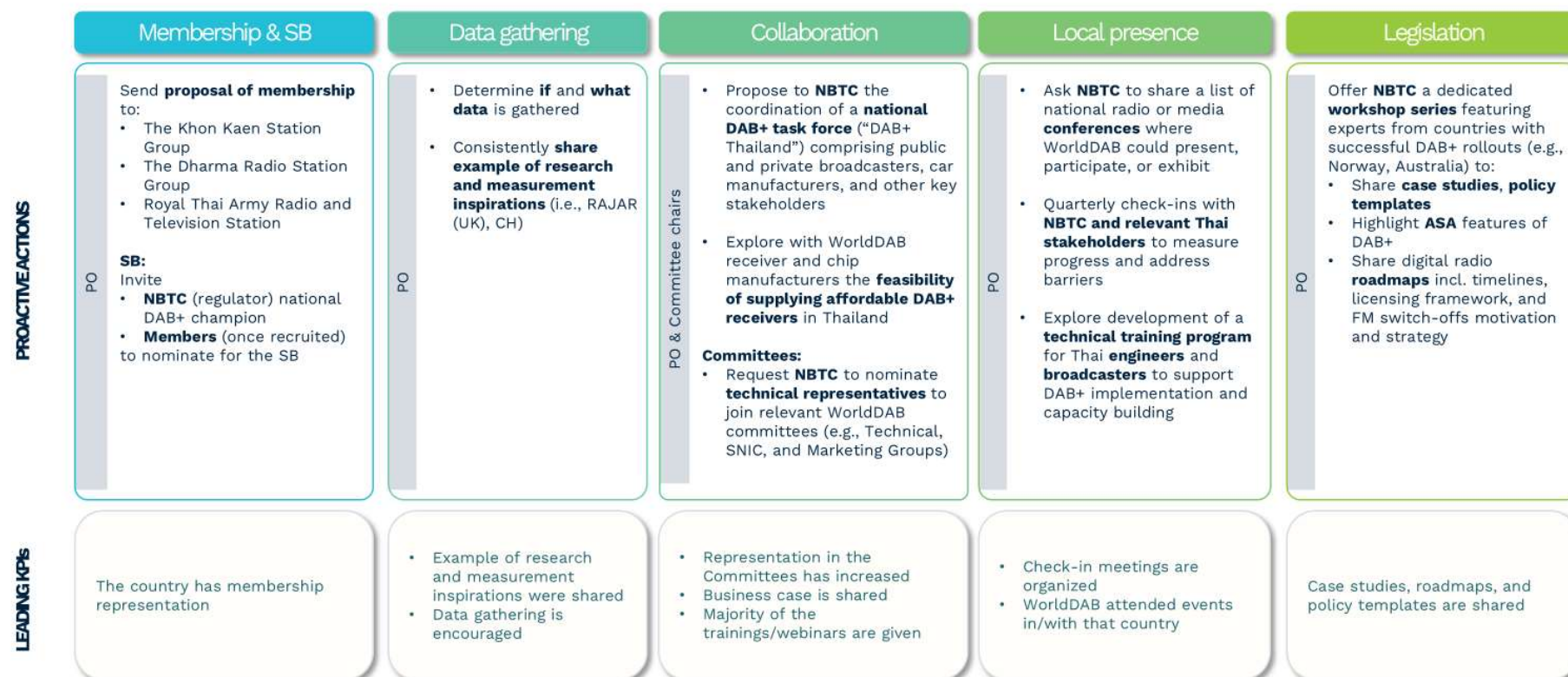


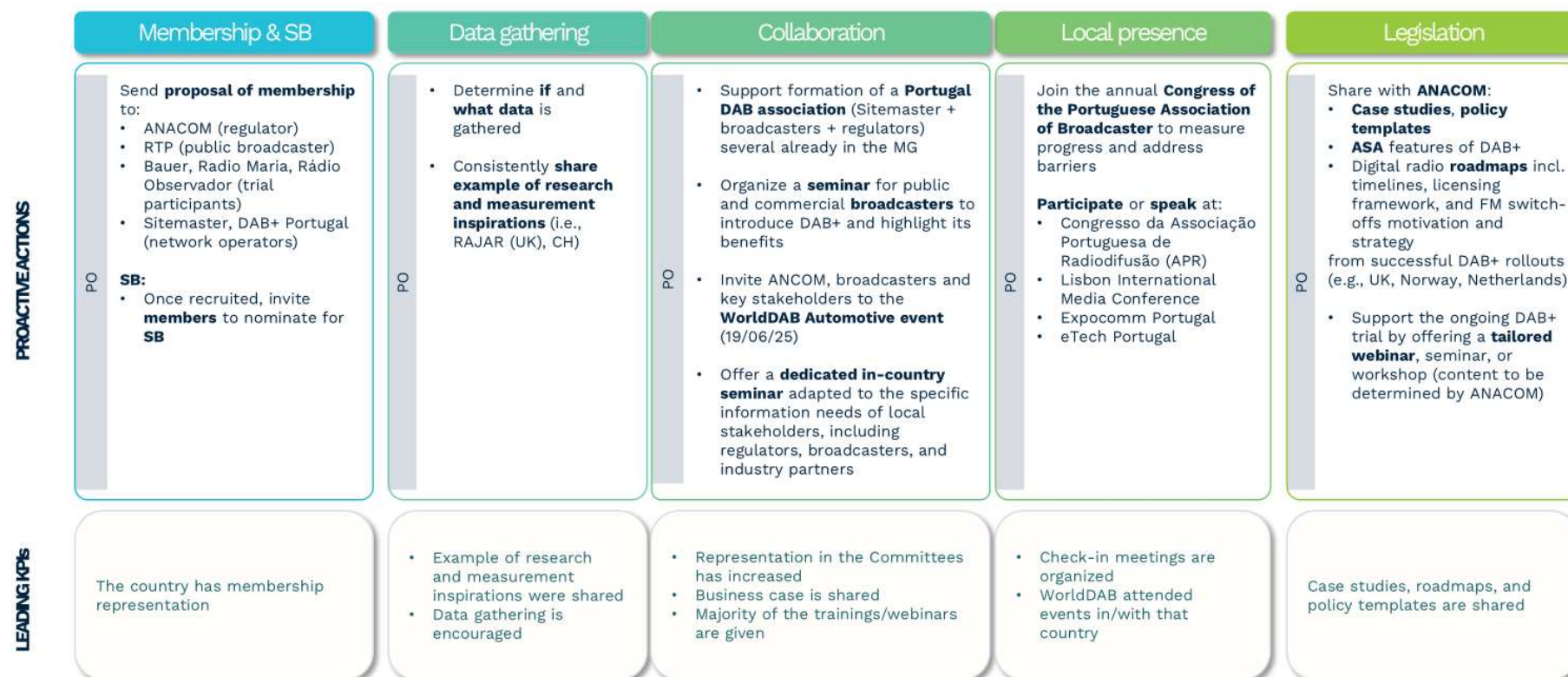


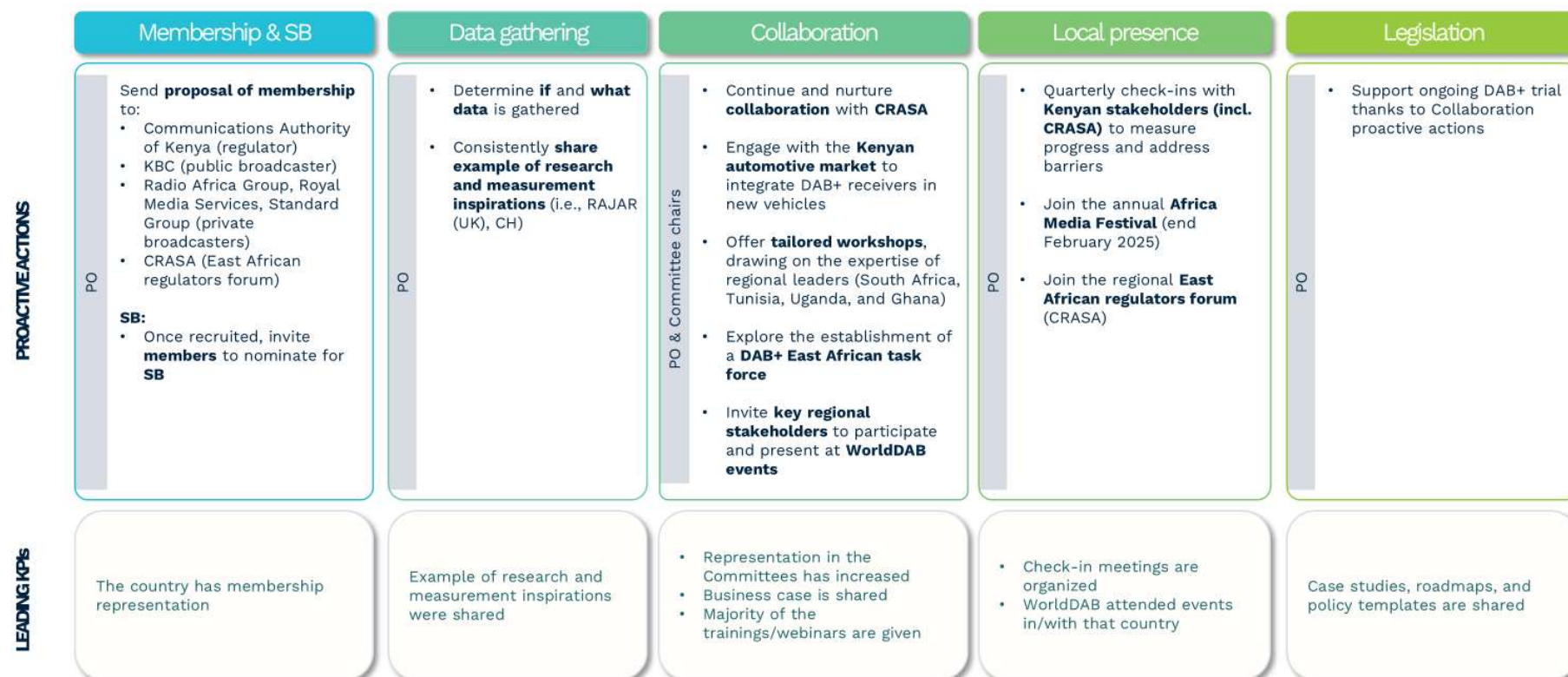


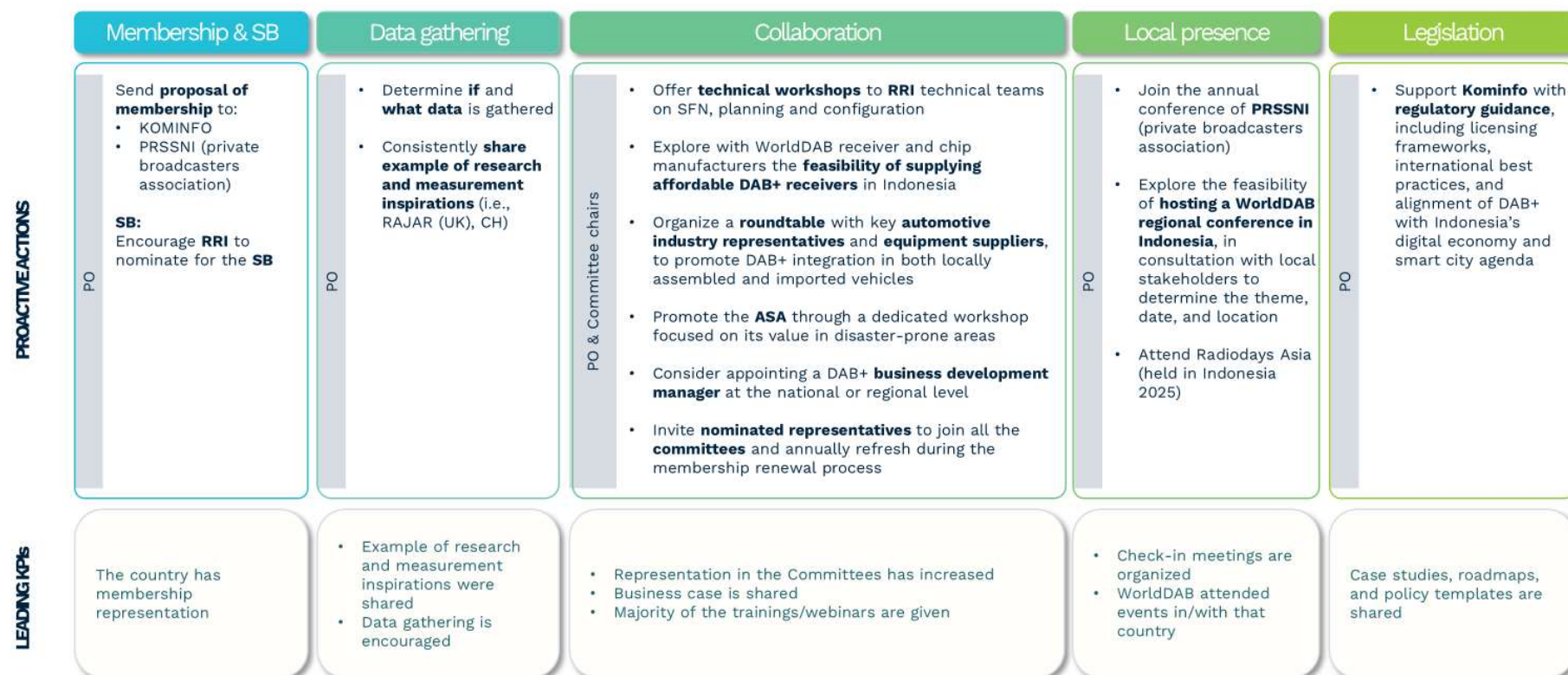


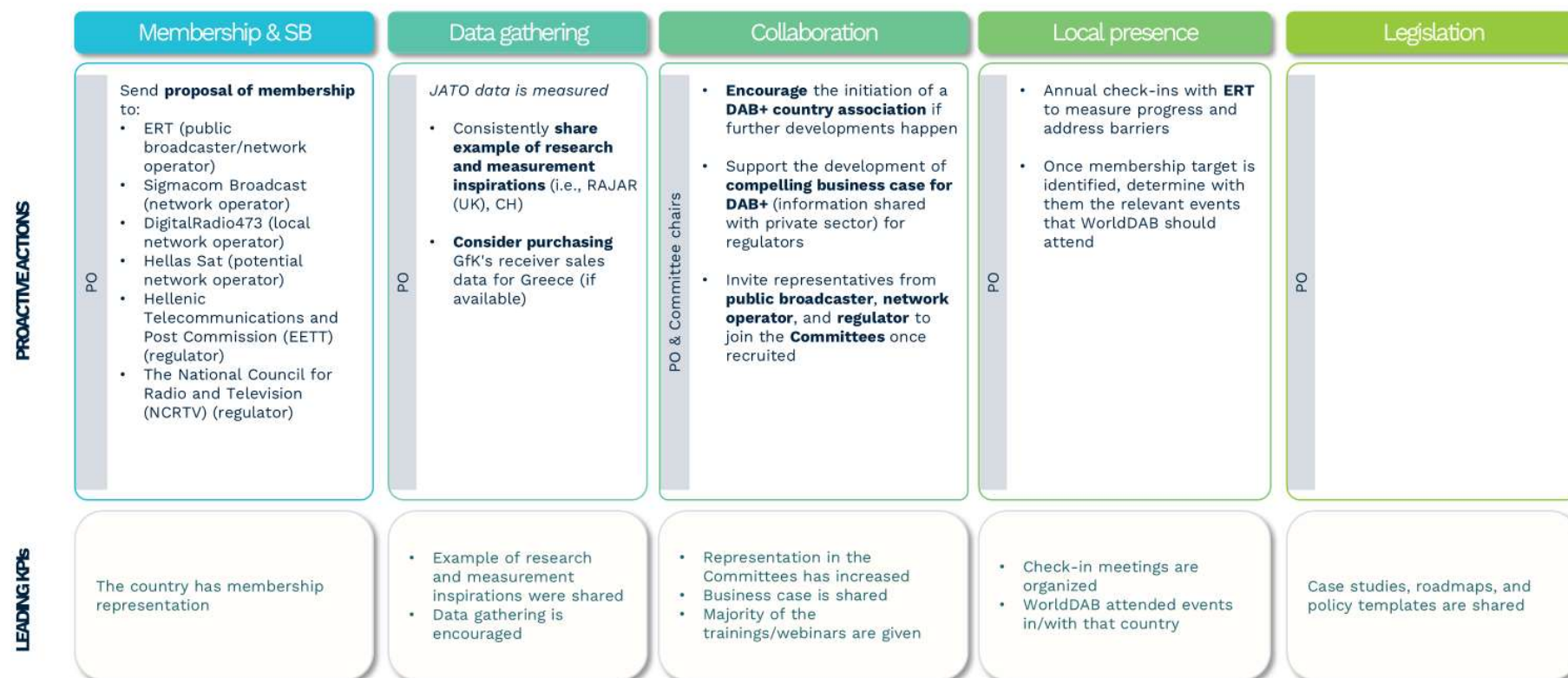


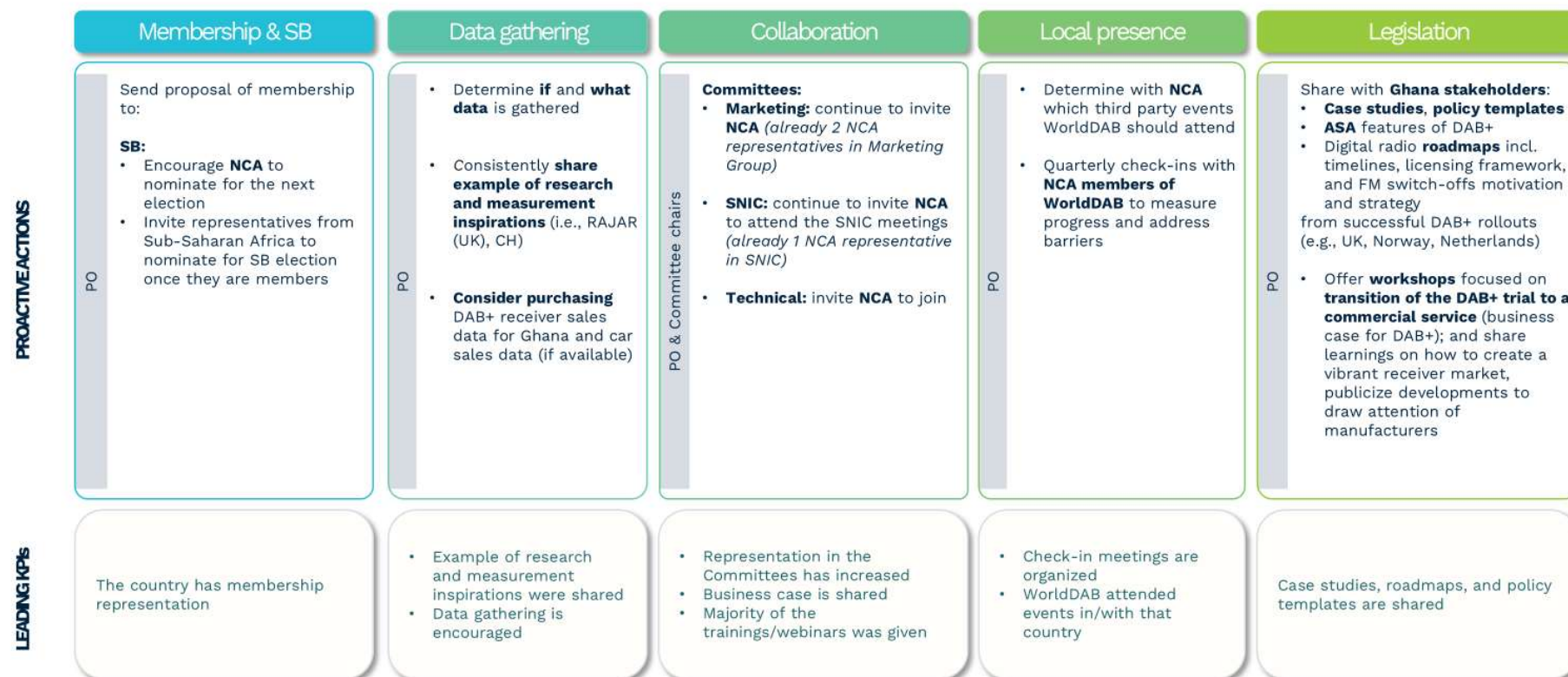


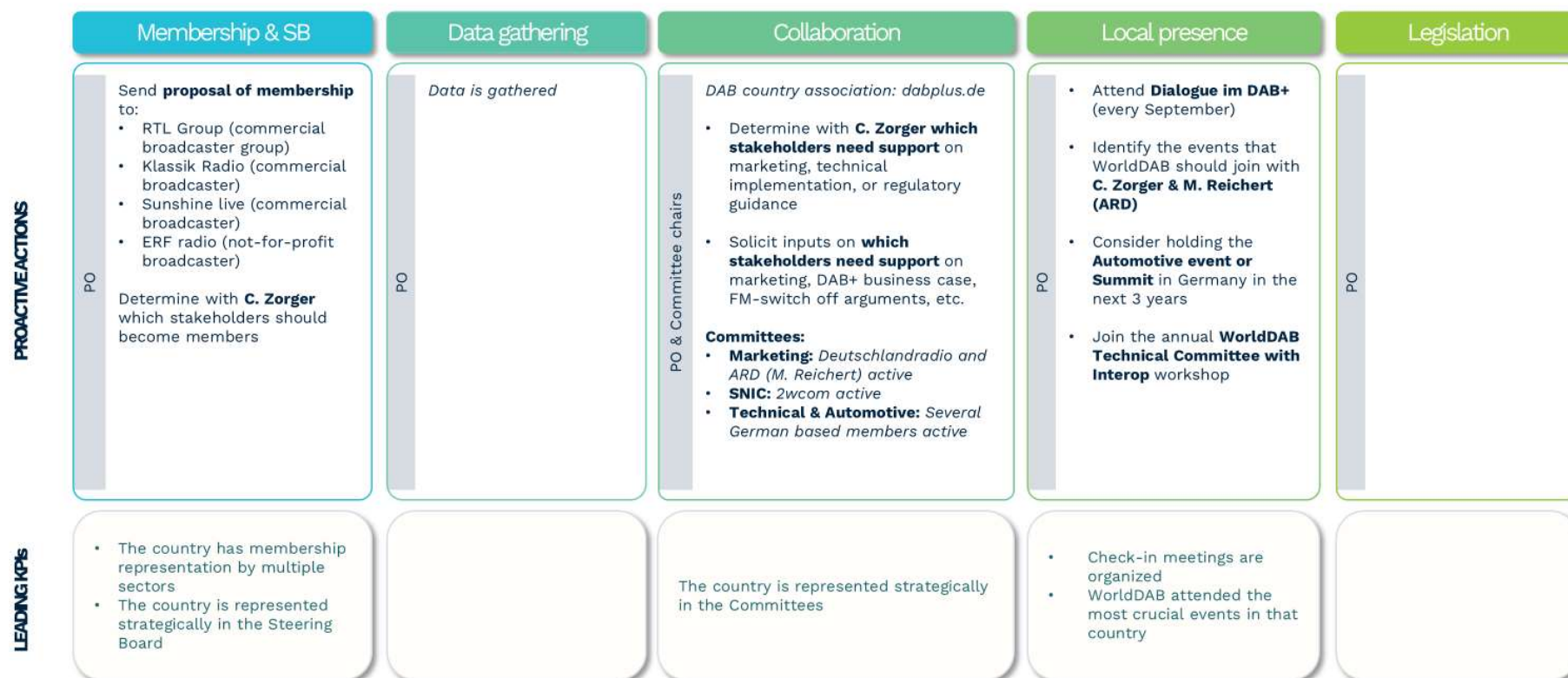


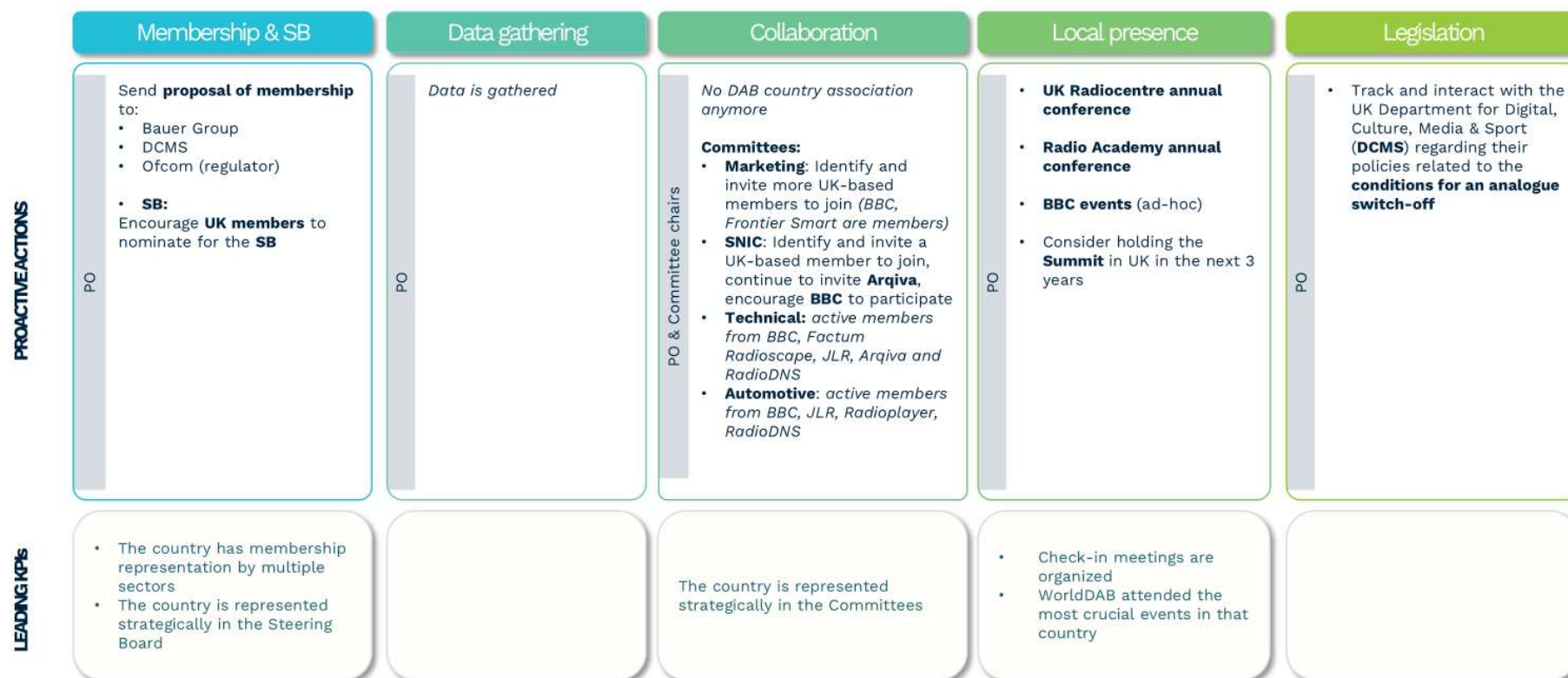


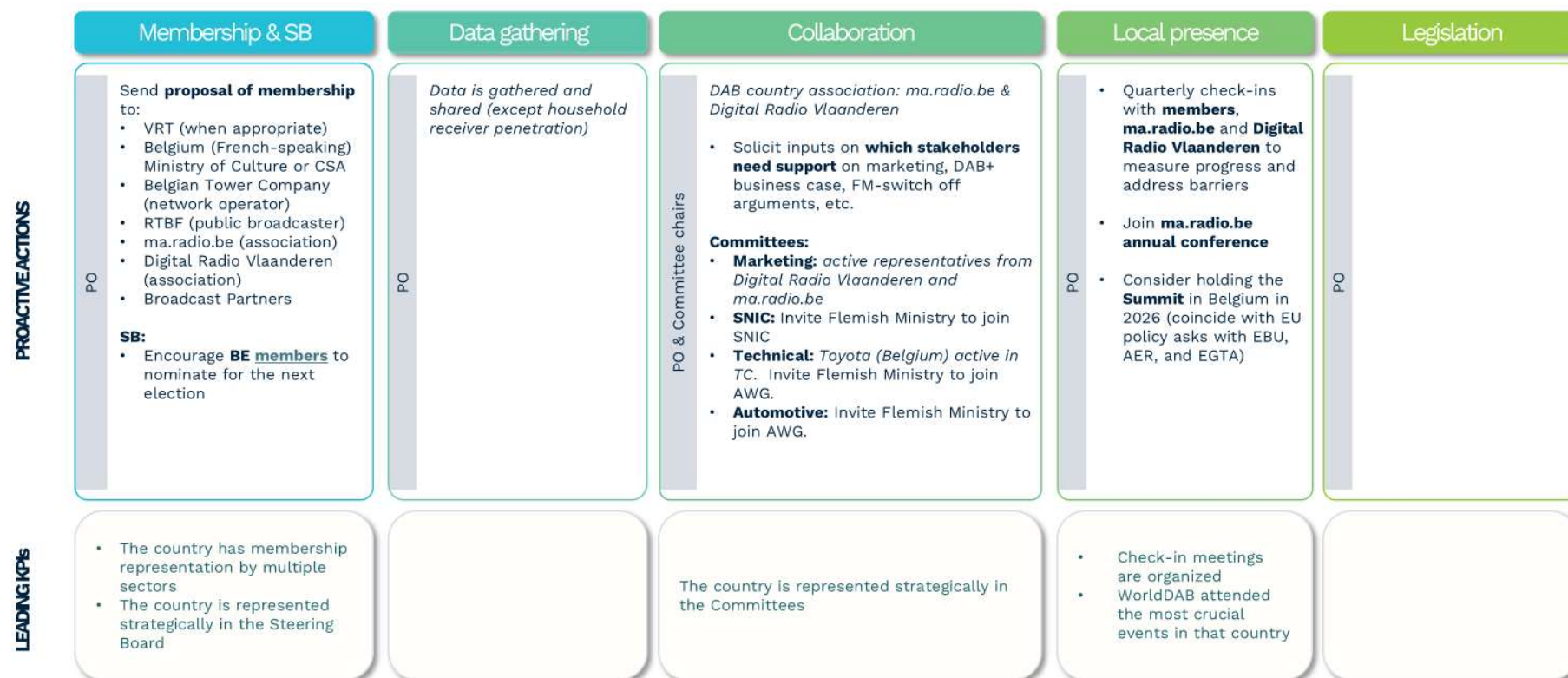


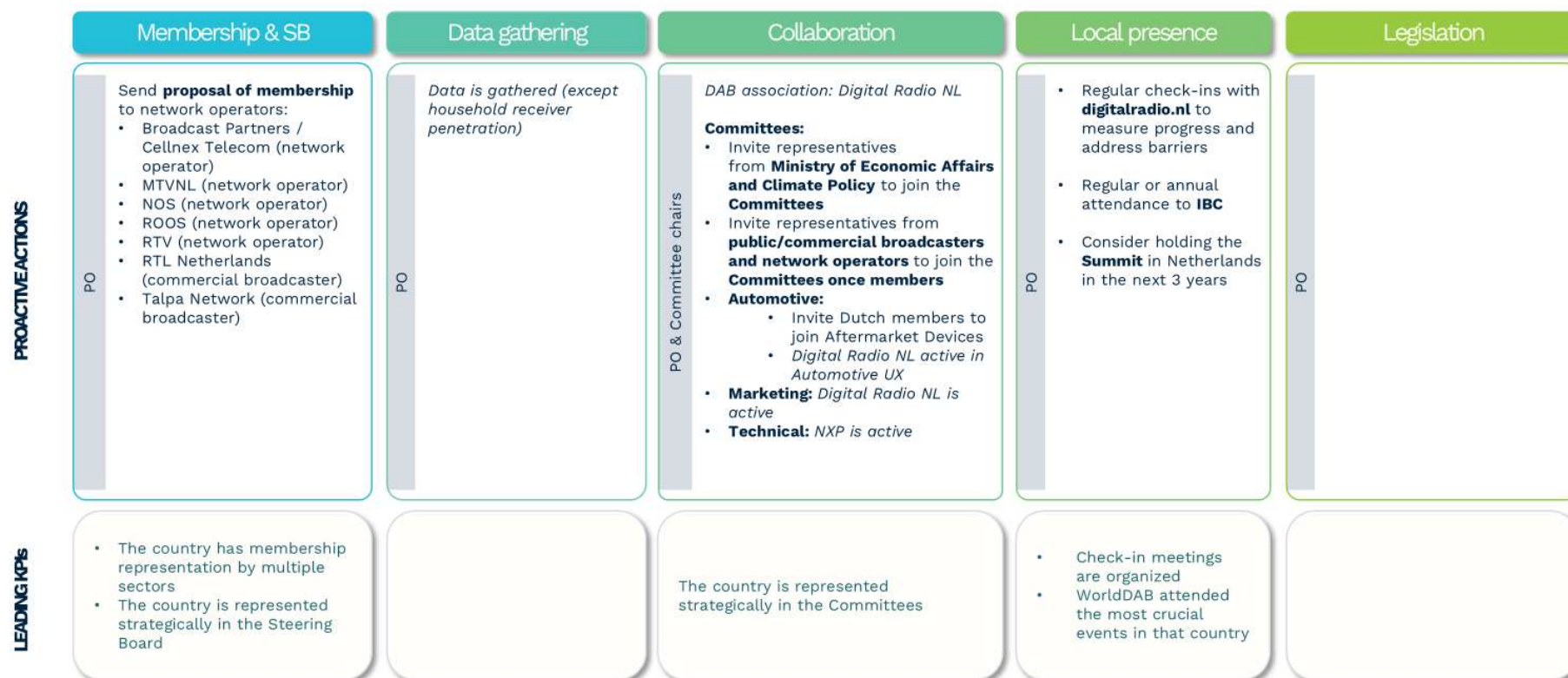


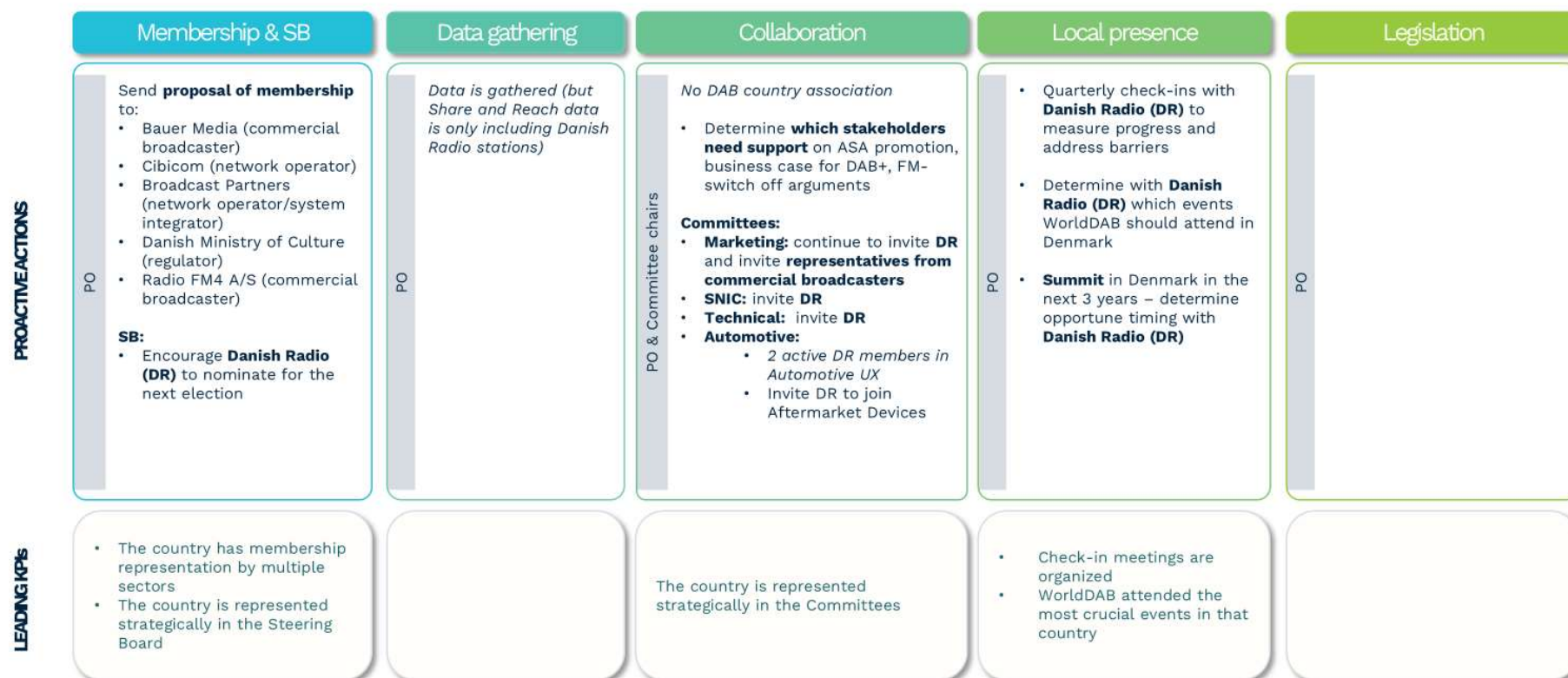


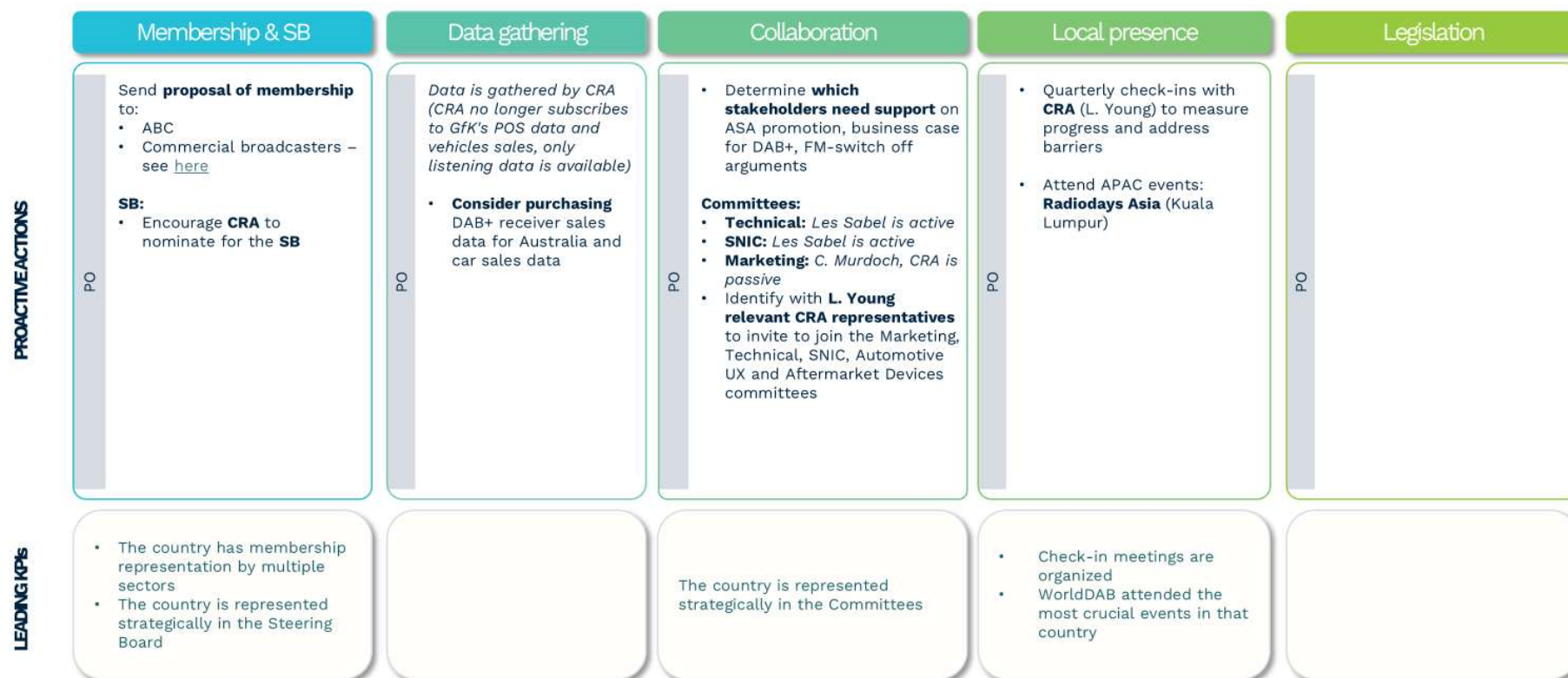


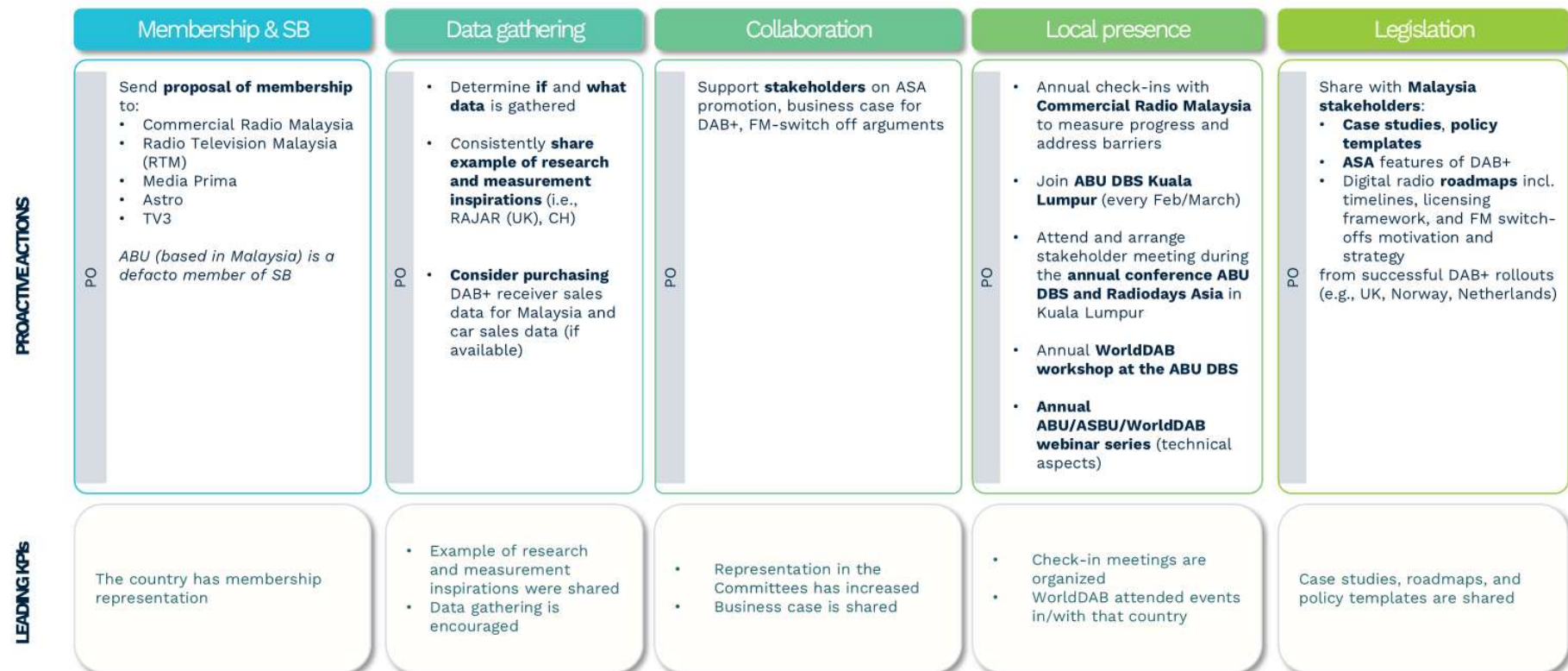


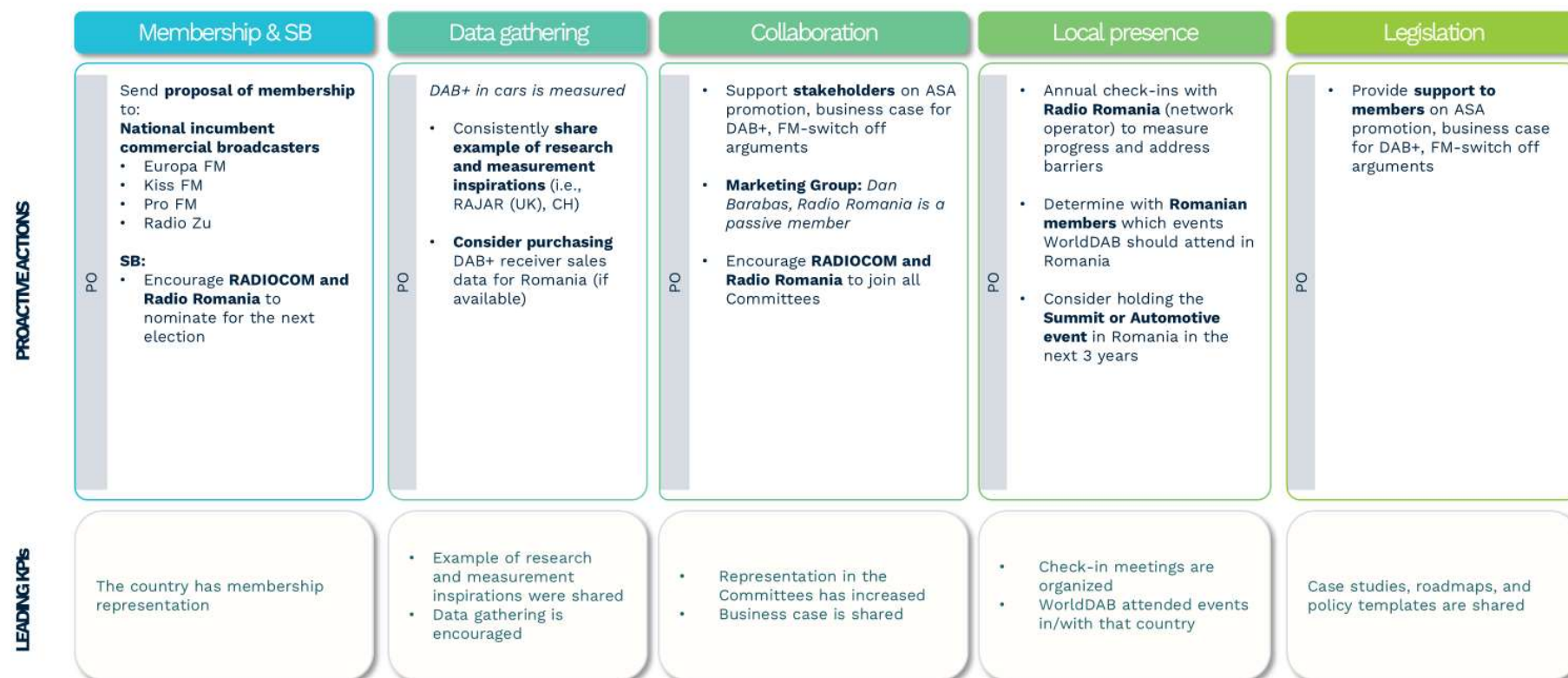












Receiver sales scorecards (Status June 2025)

This section outlines the proactive actions linked to the receiver sales, designed to drive progress toward the defined ambitions. An editable version of the corresponding scorecards is provided in Strategy PowerPoint



Receiver sales

Ambitions

Strengthen the consumer market for DAB+ by increasing receiver sales (tabletop radio)

Lagging KPIs

DAB has a unified visual identity

DAB+ is perceived as must-have for national resilience

Total and new radio sales (% DAB over total sales)

PROACTIVE ACTIONS	Build a unified DAB+ brand	Leverage partnership with crisis response organizations	Empower consumers with a reason to buy DAB+ receiver	Boost retail support for DAB+
	Promote the use of a single, strong DAB+ brand/logo across all marketing materials	Partner with national emergency and civil protection agencies to position DAB+ as a vital tool for crisis communication (political and climate uncertainty)	- Encourage national marketing bodies to run consumer campaigns targeting DAB+ receiver awareness and adoption - Support stakeholders in crafting messaging that clearly answers: “Why buy a DAB+ radio?” (i.e., free to listen, more choice, crystal-clear sound, reliable in emergencies, future-ready)	Support countries with high receiver cost perceptions through pricing education or value-focused messaging
Highlight successful country examples (e.g., national marketing campaigns or bundling strategies)				
RESPONSIBLE	PO	LEADING KPIs - Stakeholders are encouraged to promote DAB as a unified brand - National marketing bodies are encouraged to run consumer campaigns - Manufacturers received pricing education - Case studies and marketing toolkits are shared across WorldDAB members - Partnerships are established between WorldDAB and national crisis management organizations		

Automotive scorecards (Status June 2025)

This section outlines the proactive actions linked to each automotive lever, designed to drive progress toward the defined ambitions. An editable version of the corresponding scorecards is provided in Strategy PowerPoint.



Automotive

Ambitions

Increase the number of cars with DAB+ worldwide and Cars with DAB+ should provide a great user experience

Levers

1 – **Lobby** for legislation & 3 – Ensure **prominence of broadcast radio**

Lagging KPIs

All new cars should include broadcast radio, and it must be digital terrestrial

Broadcast radio should be mandatory in cars (category M and N)

PROACTIVE ACTIONS

Establish a common lobby strategy & clarify the legislative efforts: Develop a clear and coordinated lobbying approach, grounded in the experience and lessons learned from the implementation of the EECC.

Create an **EECC review factsheet** outlining key areas of **ambiguity**, **missed opportunities**, and **recommended improvements** based on real-world implementation challenges

Emphasize the **unique strengths of DAB+**, including:

- Its independence from mobile networks (IP), ensuring greater reliability and security
- The inclusion of ASA as a critical public safety tool
- The importance of DAB+ visibility in vehicles – It should be prominently featured on the car dashboard
- Broadcast radio is a lifeline during disasters when other networks go down

RESPONSIBLE

PO, Legislative working group with the support of countries' association (EBU, ASBU, etc.)

LEADING KPIs

EECC review factsheet is created and automatically shared with successful case studies to the new markets

Automotive

Ambitions	Increase the number of cars with DAB+ worldwide and Cars with DAB+ should provide a great user experience
Levers	2 – Pitch the value
Lagging KPIs	DAB+ is not perceived as an extra cost for the OEMs thanks to DAB+ benefits (emergency services, network coverage, and new services)

Strengthen the comparative research on DAB+’s reliability			
PROACTIVE ACTIONS	- Align with key stakeholders (such as Bauer and EBU) to assess the relevance of further exploring the Edison Research findings - Based on this assessment, review and analyze the existing data to identify potential gaps and areas for deeper investigation	Conduct comparative research demonstrating the reliability of DAB+ versus IP-based platforms	Highlight key advantages of DAB+ in the research output (i.e., free to listen, more choice, crystal-clear sound, reliable in emergencies, future-ready)
			Integrate these findings into legislative support materials provided to national authorities and regulators, strengthening the case for DAB+ adoption and support

RESPONSIBLE	PO, with support of network operators and broadcasters	LEADING KPIs	- Edison Research is reviewed and improved (if needed) - Comparative research is completed and integrated in the legislative support materials
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Automotive

Ambitions

Increase the number of cars with DAB+ worldwide and Cars with DAB+ should provide a great user experience

Levers

4 – Ensure consistency and alignment among DAB+ experience with OEMs

Lagging KPIs

All cars comply with minimum UX requirements

All cars support easy update of logos

PROACTIVE ACTIONS

Educate OEMs on how **best practices** for DAB+ implementation

Deliver targeted **training workshops for OEMs**, focused on key aspects of DAB+ integration including:

- Tightly produced videos on key implementation issues
- Code & HMI examples to guide practical adoption

Proactively distribute the **WorldDAB UX Guidelines** to key OEMs, ensuring early alignment with best practices

World DAB user experience guidelines

Refine the **WorldDAB UX Guidelines** to ensure a consistent look and feel, and ensure DAB+ is positioned prominently

Plan a joint working session with Automotive & Legislation working groups to explore the feasibility of introducing a **UX certification process**, and whether it should be included in the upcoming EECC revision.

Drive broadcaster accountability for UX implementation

Develop a **compelling business case** to make broadcasters responsible for proper implementation of UX guidelines

- Clearly explain how their investments are used, and how adherence to the guidelines improves listener satisfaction

RESPONSIBLE

PO, with support of Automotive working group

LEADING KPIs

- Workshops are created and given to the OEMs
- WorldDAB UX Guidelines are refined & shared with key OEMs
- Decision taken by Automotive and Legislation group regarding the UX certification process (in or out)
- Business case is developed and shared with broadcasters

Methodology: from countries prioritization to proactive support definition

9.1.1. Description of the approach

As mentioned above, the methodology to design the 2028-strategy of WorldDAB is organized in three waves:

1. Wave 1 – Priorities alignment

To develop a focused strategy, WorldDAB adopts a differentiated country approach. To achieve this, five DAB+ Maturity Phases and their corresponding thresholds are established, providing a structured way to classify countries according to their level of DAB+ adoption.



The DAB+ Maturity Phases assess a country's progress in DAB+ development, considering regulations, implementation, and adoption.

Five DAB+ Maturity Phases have been identified, each with a defined threshold that determines when a country is ready to progress to the next phase.

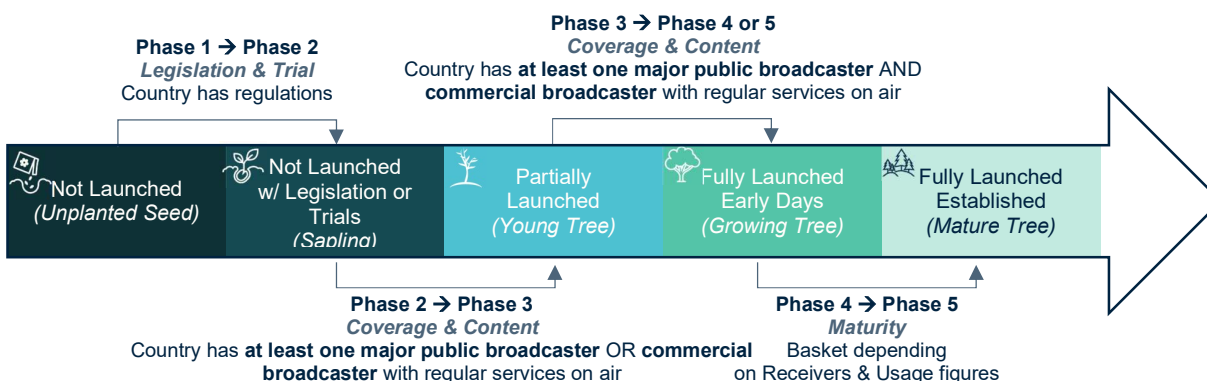


Figure 1 – DAB+ Maturity Phases



Phase 1 – Not Launched (Unplanted Seed): countries that do not have DAB+ launched (neither services on air nor trials) and no legislation.



Phase 2 – Not Launched with Legislation or Trials (Sapling): countries that do not have services on air DAB+ launched but have either legislation or trials launched.



Phase 3 – Partially Launched (Young Tree): countries that have either a major public or private broadcaster with regular services on air.



Phase 4 – Fully Launched Early Days (Growing Tree): countries with at least a major public and private broadcasters with regular services on air.



Phase 5 – Fully Launched Established (Mature Tree): countries with at least a major public and private broadcasters with regular services on air and one of the following:

- More than 80% of the incumbent radio stations (regional or national and public or private) converted to or created by DAB+; less than 50% of share of digital listening hours; and more than 20% of share of DAB+ listening hours
- More than 80% of the incumbent radio stations (regional or national and public or private) converted to or created by DAB+*; more than 50% of share of digital listening hours

Countries are assigned to DAB+ Maturity Phases based on Project Office assessments and Steering Board validation.

- *Wave 1 output:* validation of the five DAB+ Maturity Phases, their defined thresholds and the classification of countries within each phase.

2. Wave 2 – Definition of success

WorldDAB proactive efforts and resources will be directed toward countries with the highest potential for success. Therefore, countries within the same Maturity Phase are ranked based on a set of metrics. Moreover, the definition of success per phase and for the automotive sector is further developed, ensuring the strategy to remain actionable.

First, within each Maturity Phase, countries are further ranked based on key metrics that assess their market potential, economic strength, and likelihood of progress in DAB+ adoption. These metrics include:

Metric	Definition	Data source
Radio market size (USD)	Traditional radio advertising refers to audio advertising on the program service of a terrestrial radio station or network.	Data collected from Statista study ¹²
Gross domestic product per capita (USD)	Country's economic capacity and market potential, directly influencing the success and sustainability of digital broadcasting initiatives.	Data collected from International Monetary Fund ¹³
Strategic influence on region (applicable for early phase countries)	Subjective assessment of a country's regional importance and ability to influence neighbouring markets.	Project Office subjective assessment & Steering Board validation

¹² Source : <https://www.statista.com/outlook/amo/advertising/audio-advertising/traditional-radio-advertising/worldwide>

¹³ Source : <https://www.imf.org/en/Publications/WEO/weo-database/2024/April/download-entire-database>

Prospect of success <i>(applicable from Phase 1 to Phase 4)</i>	Likelihood of a country progressing to the next Maturity Phase within a reasonable timeframe.	Project Office subjective assessment & Steering Board validation
Prospect of change <i>(applicable from Phase 4 to Phase 5)</i>	Likelihood of a country to face positive (opportunities) or negative (threats) changes in the next three years.	Project Office subjective assessment & Steering Board validation

Next, for each Maturity Phase, a main objective is defined – clarifying what success looks like at that stage. To track progress toward that objective, specific lagging¹⁴ KPIs are also identified, providing a measurable way to assess each country's advancement and readiness to move to the next phase. In parallel, 2028 ambitions and their associated levers for the automotive sector are established, ensuring the strategy also reflects regional priorities and sector-specific challenges.

- **Wave 2 output:** country ranking within each DAB+ Maturity Phase, along with validation of the main objective, success definition, and lagging KPIs per phase, as well as the 2030 ambitions and levers for the automotive sector.

3. Wave 3 – Roadmap to success

Based on the country ranking from Wave 2, the Project Office and Steering Board identify twenty countries (excluding Phase 5 countries, which are prioritized by default) eligible for proactive support. The DAB+ Maturity Phases are also ranked, from the phase requiring the most proactive involvement from the Project Office and Steering Board to the phase requiring minimal intervention.

This approach ensures a focused and efficient allocation of proactive efforts. The twenty prioritized countries will receive proactive support from WorldDAB, while all other countries will continue to benefit from WorldDAB's high-quality reactive support. Additionally, proactive and concrete actions are set to ensure the automotive ambitions are met by 2030

For each prioritized country, tailored actions and leading KPIs are established to guide and measure WorldDAB's support. These actions are categorized into five key areas:

- a. **Membership:** expanding engagement by recruiting new members, inviting stakeholders to join WorldDAB working groups, and potentially integrating them into the Steering Board.
- b. **Local presence:** strengthening in-country visibility through participation in and organization of meetings and events.
- c. **Collaboration & marketing:** partnering with national promotion bodies to drive awareness and foster industry collaboration.

¹⁴ **Lagging KPIs** are **outcome-based indicators** that measure the **end results** of actions or strategies, confirming whether objectives were achieved

- d. **Data gathering:** assisting in the collection and analysis of relevant market data to support informed decision-making.
 - e. **Regulations:** providing guidance on regulatory frameworks, supporting countries in drafting policies, and facilitating approval processes.
- **Wave 3 output:** list of the twenty countries (excluding established countries) eligible for WorldDAB's proactive support and Maturity Phases ranking. For each prioritized country and each automotive sector ambition, definition of Project Office and Steering Board's actions and leading KPIs.

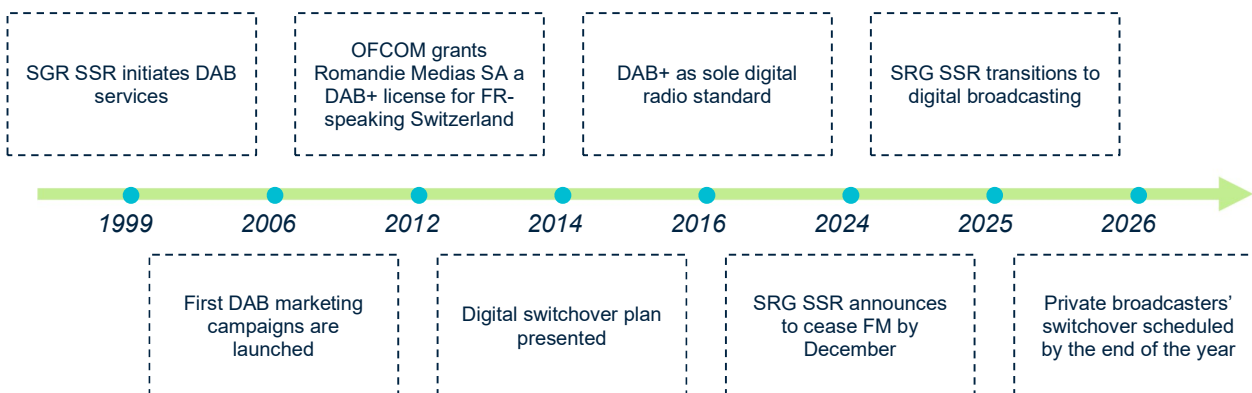
9.1.2. Tools and resources

To ensure a data-driven and well-informed strategy, WorldDAB leverages a combination of quantitative data sources and qualitative insights throughout the analysis. These tools and inputs provide a comprehensive view of each country's DAB maturity, market potential, and strategic importance.

1. **Country Prioritization Excel:** structured dataset compiling key country-specific metrics – qualitative and quantitative, including:
 - a. Gross domestic product per capita
 - b. Radio market size
 - c. Population number
 - d. DAB+ Maturity Phase
 - e. Prospect of change/success (depending on the phase)
 - f. Strategic influence on the region
 - g. Networking coverage information
 - h. Existence of a development roadmap
 - i. List of promotion bodies
 - j. Historical trials overview
2. **Project Office alignment:** regular alignment meetings with WorldDAB's Project Office to refine strategic actions, validate country classifications, and ensure operational feasibility.
3. **Steering Board strategic & automotive working groups:** groups set up temporarily to support the development of the 2025-2028 strategy, to align on key priorities, regulatory strategies, and market development approaches.
4. **Regional stakeholder interviews:** interviews with regional association representatives to gain firsthand insights into local challenges, opportunities, and regulatory landscapes.

Success stories: Switzerland & Norway

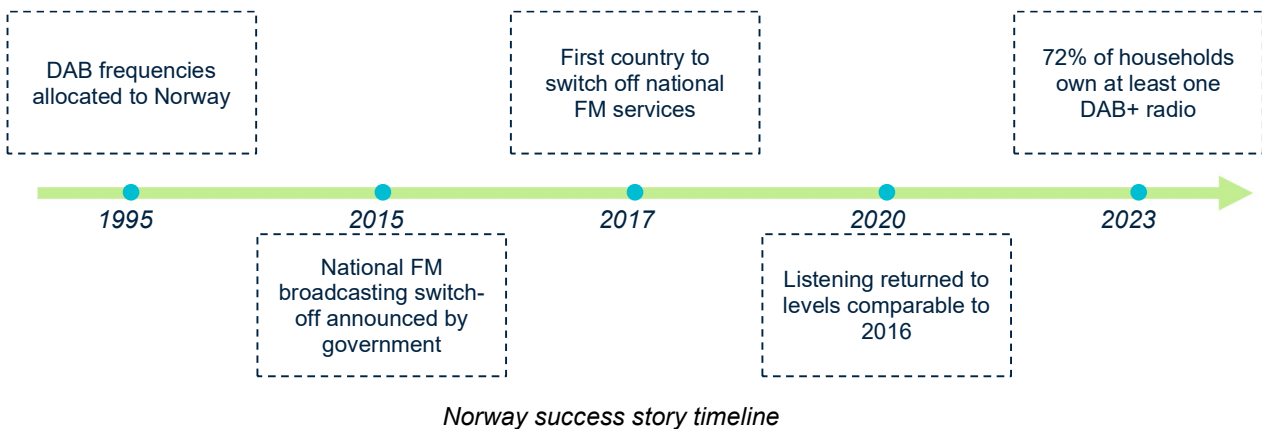
Switzerland has been a forerunner in adopting DAB+, marking significant milestones over the years:



Switzerland success story timeline

- **1999:** The Swiss public broadcaster, **SRG SSR**, initiated **DAB services**, laying the groundwork for digital radio in the country.
- **2006:** Comprehensive **marketing campaigns** were launched to promote DAB adoption, aiming to familiarize the public with the benefits of digital radio.
- **2012:** The Federal Office of Communications (OFCOM) **awarded a broadcast license** to Romandie Médias SA for a DAB+ network in French-speaking Switzerland, **expanding digital radio's reach**.
- **2014:** A detailed **digital switchover plan** was presented by radio market players to the regulator, outlining the transition from FM to DAB+.
- **2016:** A decision was made to **adopt DAB+ as the sole digital radio standard**, emphasizing commitment to this technology.
- **2024:** In June, SRG SSR announced plans to **cease FM broadcasting** by 31 December 2024, citing that less than 10% of listeners relied exclusively on FM.
- **2025:** On 1 January, SRG SSR transitioned to **exclusively digital broadcasting**, marking a significant shift in Swiss radio history.
- **2026:** **Private broadcasters** are **scheduled to complete the FM to DAB+ transition** by the end of the year, finalizing the nationwide move to digital radio.

Norway has been a pioneer in the transition to DAB+, achieving several key milestones:



- **1995:** Norway was allocated DAB frequencies, enabling the start of digital radio broadcasting.
- **2009:** Jørn Jensen from Norwegian public broadcaster NRK was President of WorldDAB for four years, providing high-level visibility and amplifying Norway's messaging and leadership within the international DAB+ community.
- **2015:** The Norwegian government announced plans to switch off national FM broadcasting in January 2017, setting the stage for a complete digital transition.
- **2017:** Norway became the first country to switch off national FM services, completing a region-by-region transition to DAB+ by December. This move expanded the number of national radio stations from five to 32, significantly enhancing listener choice.
- **2020:** A WorldDAB report indicated that total radio listening in Norway had returned to levels comparable to 2016, prior to the digital switchover. Younger and older audiences showed the most significant recovery, with daily reach at 62-64% and weekly reach at 88%.
- **2023:** Studies revealed that 72% of Norwegian households owned at least one DAB+ radio, and 99% of the population had access to digital radio (DAB+ and IP).