ILLICIT IPTV IN EUROPE AND NORTH AFRICA

Economic Report 2026

Audiovisual Anti-Piracy Alliance - 27 October 2026

GOBELIN HOUSE SLU

Illicit IPTV in Europe and North Africa

Economic Report
October 2026

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Acknowledgments

The author is grateful for comments on the draft report from Miruna Herovanu, Executive Director – AAPA; Dr Nikolaus Thumm, Associate with Technical University Berlin, Senior Consultant at the OECD; and Dr Nathan Wajsman, Director of Corporate Strategy and Foresight, and Chief Economist at EUIPO.

This Report benefited from consultations with Maria Boyadzhieva-Georgieva, Litigation Manager, bTV Media Group; Julian Lippmann, Lead Anti-Piratage, Canal+; Mark Mulready, Vice President - Head of Anti-Piracy, Irdeto; Miro Pinkas, Lead Digital Forensics Engineer, Synamedia; Maria Solbiati, Director Domestic Media Rights – Italy, Lega Serie A; Dr. rer. pol. Hansueli Stamm, Chief Economist, Swiss Federal Institute of Intellectual Property; and European Audiovisual Observatory.

FOREWORD

This study is published at a time of growing cybersecurity concerns across Europe and globally. These concerns are also acute in the context of illicit IPTV, which threatens the protection of legitimate audiovisual content and can expose users to cyber risks.

Internet Protocol Television (IPTV) allows television content to be delivered over the internet. As legitimate streaming services have become more widely available, illicit IPTV services have also grown, offering access to audiovisual content without the authorisation of rights holders.

The Audiovisual Anti-Piracy Alliance (AAPA) works with the industry, public authorities and law enforcement to tackle piracy and support the protection of intellectual property. Raising awareness of the scale and effects of illicit IPTV is an important part of this work.

Illicit IPTV has expanded, operating at scale and raising concerns that reach beyond copyright infringement. The study estimates that in 2025 illicit IPTV was accessed by 34.4 million people in the EU27, the United Kingdom and Switzerland (8.9% of the population aged 16–74); 7.1 million in the Western Balkans and Türkiye (9.3%); and 14.8 million in Algeria, Egypt and Morocco (11.4%). The study also estimates the economic effects on legitimate providers, public finances and employment.

IPTV as well as broader audiovisual piracy is not an isolated copyright issue. It increasingly forms part of a wider criminal ecosystem. Illegal services can expose users to phishing, malware and data theft, while diverting revenues that support rights holders, jobs and investment in new content.

Rapid expansion and development of AI bring new enforcement challenges. It can make existing piracy operations faster, more scalable and harder to detect. AI's rapid development reinforces the need for effective, adaptable responses.

Legal rights are only as meaningful as the mechanisms available to enforce them. Effective action requires trusted cooperation among rights holders, public authorities, law enforcement, online platforms, hosting providers and other intermediaries.

AAPA leads efforts to build partnerships and promote effective action against audiovisual piracy. This economic report aims to inform these efforts and support responses that protect both the audiovisual sector and the audiences it serves.

Miruna Herovanu

Executive Director

The Audiovisual Anti-Piracy Alliance (AAPA)

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LIST OF ABBREVIATIONS

AAPA	Audiovisual Anti-Piracy Alliance
AI	Artificial Intelligence
AV	Audiovisual
CIT	Corporate Income Tax
COVID	Corona Virus Disease
EAO	European Audiovisual Observatory
EBIT	Earnings Before Interest and Taxes
EU	European Union
EUIPO	European Union Intellectual Property Office
EUR	Euros
FTE	Full Time Equivalent
IP	Intellectual Property
IPTV	Internet Protocol Television
MENA	Middle East and North Africa
NACE	Statistical Classification of Economic Activities in the European Community
OECD	Organisation for Economic Co-operation and Development
ONS	The Office for National Statistics, UK
TV	Television
UK IPO	The Intellectual Property Office of the United Kingdom
VAT	Value Added Tax
VoD	Video on Demand
WBT	Western Balkans and Türkiye

LIST OF COUNTRIES

AL	Albania
AT	Austria
BA	Bosnia and Herzegovina
BE	Belgium
BG	Bulgaria
CY	Cyprus
CZ	Czechia
DE	Germany
DK	Denmark
DZ	Algeria
EE	Estonia
EG	Egypt
EL	Greece
ES	Spain
FI	Finland
FR	France
HR	Croatia
HU	Hungary
IE	Ireland
IT	Italy
LT	Lithuania
LU	Luxembourg
LV	Latvia
MA	Morocco
ME	Montenegro
MK	North Macedonia
MT	Malta
NL	Netherlands
PL	Poland
PT	Portugal
RO	Romania
RS	Serbia
SE	Sweden
SI	Slovenia
SK	Slovakia
TR	Türkiye
UK	United Kingdom
EU27	27 Member States of the European Union
EU27+	27 Member States of the European Union with the UK and Switzerland
MENA	Northern African economies: Algeria, Egypt and Morocco
WBT	Western Balkan economies (Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Serbia) with Türkiye

EXECUTIVE SUMMARY

The objective of this Study is to provide up-to-date evidence on the scale of Internet Protocol Television (IPTV) piracy and to estimate its economic and fiscal impact. The Study covers 38 economies across three regions:

- European Union Member States, together with the UK and Switzerland (EU27+);
- five Western Balkan economies – Albania, Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia – and Türkiye (WBT);
- three North African economies – Algeria, Egypt and Morocco (MENA).

Following key estimates are provided at both country and regional levels:

1. the number of **users of illicit IPTV services**;
2. the **revenue generated by illicit IPTV providers**;
3. the **revenue losses** incurred by legal Pay-TV service providers;
4. the associated **fiscal effects**;
5. the resulting **employment effects**.

Main findings are summarized in Table 1.

Table 1. SUMMARY OF THE SCALE AND ECONOMIC IMPACT OF ILLICIT IPTV BY REGION (2025)

Indicator	EU27+	WBT	MENA
Number of illicit IPTV users	34.4 million	7.1 million	14.8 million
Share of population that uses illicit IPTV	8.9%	9.3%	11.4%
Share of youth (16–24) that uses illicit IPTV	20.2%	22.9%	23.8%
Annual illegal revenue (EUR)	2.6 billion	313.5 million	192 million
Monthly illicit IPTV cost per user (EUR)	6.23	3.70	1.08
Annual revenue losses (EUR)	5.8 billion	130 million	480 million
Annual VAT losses (EUR)	1.2 billion	26 million	80 million
Annual CIT losses (EUR)	126 million	2.3 million	9.2 million
Direct employment loss (persons)	30,181	2,080	5,846
Total employment loss (persons)	53,802	3,199	12,146

Methodology[1] is based on the methodological approach applied by the EUIPO in 2019 report *Illegal IPTV in the European Union* to estimate users of illicit IPTV and the illicit revenue generated by copyright infringing IPTV providers. This methodology was further adopted by AAPA Economic Report *Illicit IPTV in Europe* published in 2022, which additionally estimated the potential revenue losses incurred by legitimate AV content providers in Europe and examined illicit IPTV consumption among young people aged 16–24.

The present Report provides updated results that can be compared with the estimates in both EUIPO (2019) and AAPA (2022) reports. Moreover, the present Study extends the scope of the analysis. Its geographical coverage is expanded to include Switzerland alongside the EU27 and the UK, as well as additional countries in the Western Balkans, Türkiye and North Africa.

Two new estimates of the wider economic impact of illicit IPTV are considered: potential fiscal effects arising from foregone value added tax (VAT) and corporate income tax (CIT) revenue, as well as direct and total employment effects.

The AAPA commissioned the Gobelin House SLU in January 2026 to produce this Report. The commissioned project was led, and the Report was authored by Dr Antanina Garanasvili. The Report greatly benefits from expert consultations and data provided by Audiovisual Anti-Piracy Alliance (AAPA) Members and European Audiovisual Observatory (EAO).

[1] This Report builds on the EU Intellectual Property Office (EUIPO) commissioned project which was awarded to CIPPM/BU in 2018. The report that was produced for the EUIPO by the CIPPM/BU team, was published in 2019 and can be accessed here. This Report adopts the methodology that was utilised in the EUIPO project and updates the data to reflect developments in 2025. The reliability of the updated figures in the AAPA Report remains the responsibility of the present project team and any liability on the part of the EUIPO is disclaimed.

INTRODUCTION

This is the third consecutive economic report estimating the scale and effects of illicit IPTV, following the EUIPO (2019) and AAPA (2022) reports.

The current edition builds on these earlier studies and extends the geographical coverage to a wider European region. In addition to the EU27, the United Kingdom and Switzerland, it covers Türkiye, Albania, Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia, as well as Algeria, Egypt and Morocco from the MENA region.

The study updates the available estimates and broadens the analysis by measuring the potential fiscal and employment losses associated with illicit IPTV.

Objectives

This Economic Report aims to:

- provide independent and up-to-date information for the industry, policymakers, academia, and a wider public.
- provide comparable estimates across all 38 economies in three regions: EU27+, WBT, and MENA.
- report on key trends observed and conduct a rigorous regional and country-level analysis of illicit IPTV scale and economic effects in 2025.

Key Estimates

The present Study estimates (i) the number of individuals that consume unauthorised IPTV, and share of population estimated to access illicit IPTV, (ii) revenue generated by illicit IPTV providers; (iii) potential revenue losses incurred by legal Pay-TV providers; (iv) fiscal effects, and (v) employment effects.

The Study covers 38 economies across three regions:

- European Union Member States, together with the UK and Switzerland (EU27+);
- five Western Balkan economies – Albania, Bosnia and Herzegovina, Montenegro, North Macedonia and Serbia – and Türkiye (WBT);
- three North African economies – Algeria, Egypt and Morocco (MENA).

Regions and economies in this Study differ in population size, demographic structure, levels of economic development and household income. These differences may influence both the demand for audiovisual content and the affordability, accessibility and patterns of use of illicit IPTV services. Applying a consistent analytical framework across all 38 economies makes it possible to compare the prevalence of illicit IPTV and its economic impact across diverse national and regional contexts.

IPTV Definition

IPTV (Internet Protocol Television) is the delivery of television content over Internet Protocol networks (ITU, 2020). IPTV technology offers the ability to stream the source media continuously, unlike downloaded media. It also enables the distribution of audiovisual content through the internet, instead of traditional methods, such as satellite or cable (Eurojust, 2022).

The following points describing IPTV can be specified:

- Television service is delivered over the Internet.
- IPTV service includes internet streamed TV (live or catch-up). It can be coupled with an on-demand streaming (VoD), and other types of AV content such as music or even video games.

Illicit IPTV is the distribution of television content without the copyright owner's permission.

Illicit IPTV: Background

The proliferation of unauthorised IPTV services has become a growing global concern. Online piracy, and illicit IPTV in particular, poses an increasingly acute challenge to legitimate audiovisual providers, creators and producers, as well as to law-enforcement authorities and governments.

It reduces legitimate economic activity, causes revenue and employment losses in the audiovisual sector and the wider economy, and leads to fiscal losses through reduced tax receipts. Users of illicit IPTV services may also be exposed to malware, personal-data theft and other security risks (AAPA, 2022b).

A recent European Parliament study observes that *"live-content piracy in the EU has become a structured and economically resilient market centred on illegal IPTV, dedicated apps and other real-time retransmission models, especially for sports. It is no longer a matter of isolated links, but of organised services that replicate lawful streaming offers"* (Riccio, 2026, p. 9).

The study further notes that, *"even where overall online piracy has stabilised, illegal IPTV and live sports piracy remain highly significant. This segment has become more specialised and profitable, driven not only by enforcement gaps but also by pricing, convenience and fragmentation in legal offers"* (Riccio, 2026, p. 9).

The continued expansion of illicit IPTV undermines legal markets, diverts revenue away from legitimate providers, reduces tax receipts and adversely affects employment across the economies examined in the present Study. Its wider indirect effects extend across the audiovisual value chain: foregone revenue and employment opportunities limit investment in sectoral growth, content creation and distribution. Although not all such effects can be quantified, they compound the direct economic losses incurred by rights holders, content creators and legitimate service providers.

Methodology

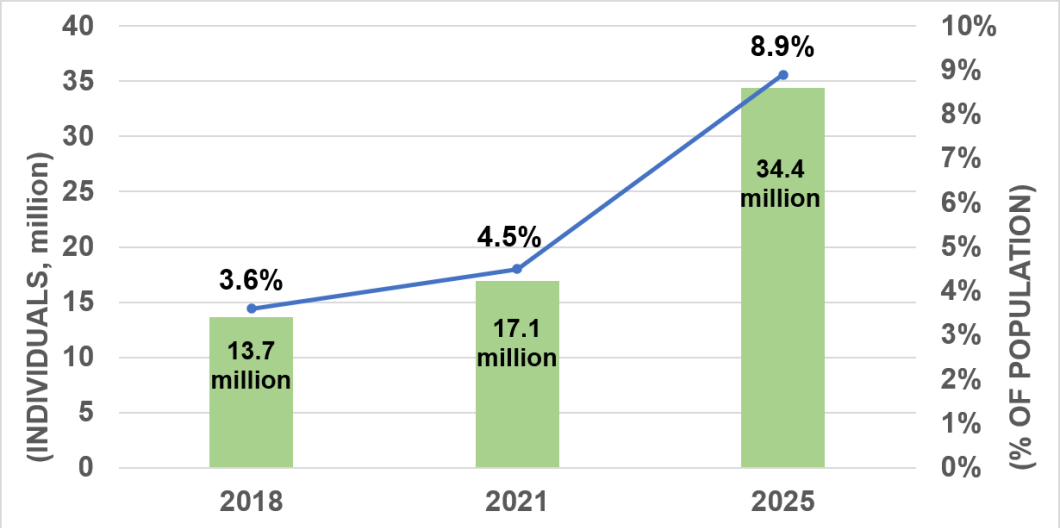
Quantitative estimates are based on official and harmonized data sources to ensure full comparability of the reported estimates among the economies studied. The report is based on the methodological approach developed in the EUIPO (2019) report on *Illegal IPTV in the European Union* and adopted by AAPA (2022) report on *Illicit IPTV in Europe*. Quantitative methodology and data explication is provided in the Annex A.

The Report is structured as follows. Trends in Illicit IPTV Scope and Impact are discussed in the next section. Section 1 provides an estimate of the magnitude of illicit IPTV in Europe in terms of users. Section 2 provides an estimate of unlawful income gained by unauthorised IPTV subscription providers. Section 3 provides an estimate of potential losses in revenue suffered by AV content providers due to illicit IPTV. Section 4 provides estimates of fiscal effects. Section 5 provides estimates of employment effects. The Report findings are summarized in the Executive Summary and the Conclusion.

TRENDS IN ILLICIT IPTV SCOPE AND IMPACT

To provide historical context and assess recent developments in the scale of illicit IPTV, this section compares the latest estimates with previous benchmark studies conducted by the EUIPO (2019) and AAPA (2022). The comparison highlights the evolution of illicit IPTV consumption in Europe over the period 2018 – 2025, both in terms of the number of individuals accessing unauthorised services and the associated economic losses incurred by legitimate audiovisual providers. The results reveal a sustained and accelerating growth in illicit IPTV consumption across Europe, accompanied by a substantial increase in the financial burden imposed on legal Pay-TV operators and rights holders. These trends underline the increasing economic significance of illicit IPTV and the growing challenges it poses for the audiovisual sector.

Figure 1. USERS OF ILLICIT IPTV IN EU27+ (2018-2025)



Note: Population aged 16-74. 2018 data is from EUIPO (2019). 2021 data is from the AAPA (2022).

As illustrated in Figure 1, the present Study estimates that by 2025 the number of individuals accessing unauthorised IPTV services in Europe has increased to **34.4 million persons**[2], corresponding to **8.9% of the population** aged 16–74. This represents a 101% increase compared with 2021 – double the 2021 figure – and an increase of 151% compared with 2018.

Based on the EUIPO (2019) estimates, 13.7 million individuals, representing 3.6% of the European population[3], accessed illicit IPTV services in 2018. The AAPA (2022) report showed that this figure increased to 17.1 million individuals (4.5% of the population) in 2021.

The continuing growth in illicit IPTV consumption reflects the expansion of internet-streamed television, increasing consumer familiarity with IPTV technologies, and the persistent availability of unauthorised subscription services. The findings suggest that illicit IPTV has evolved into a mainstream channel for copyright infringement across Europe.

[2] 2025 data is for the EU27 together with the UK and Switzerland (for comparison UK27+UK value is 33.8 million users (8.9% population).
[3] 2018 and 2021 data is for EU27 together with the UK. 2021 data is from the AAPA (2022).

Two key factors contribute to the marked increase in the scale of illicit IPTV use in Europe in 2025: (i) growth in the digital piracy rate, as reported by the EUIPO (2023); and (ii) growth in the share of the population watching television online, as reported by Eurostat (2024).

I. Rise in online piracy rate in Europe.

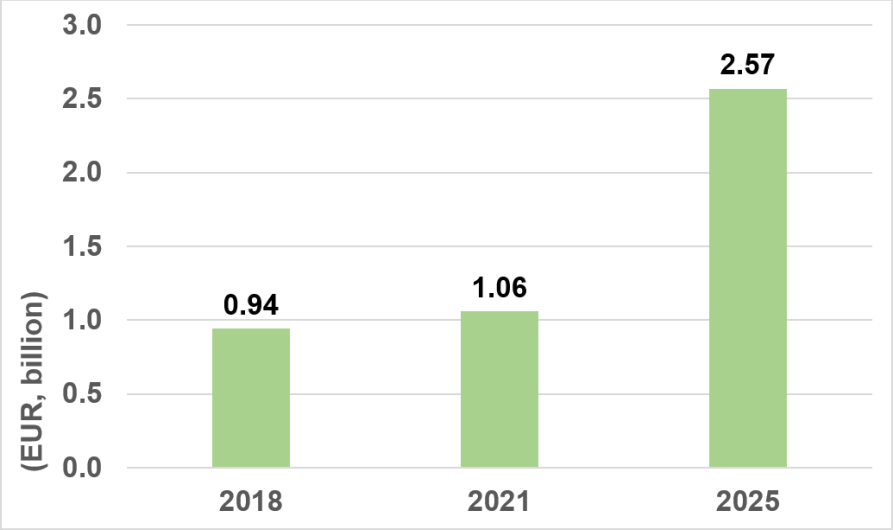
On average **14%** Europeans admit to having accessed content via illegal sources intentionally in the past 12 months (EUIPO, 2023). This is a much higher rate than **8%** reported by EUIPO in 2020. Previous EUIPO surveys conducted in 2017 and 2013 found that 10% Europeans access illegal online content intentionally. The 2020 figure represents a slight decline in online piracy rate when digital piracy trends have been significantly influenced by the COVID-19 pandemic.

The 2020 decline in online piracy occurred during a period in which digital-content consumption was substantially affected by the COVID-19 pandemic. Demand for legal streaming services rose sharply during the lockdowns. In the UK, Ofcom (2020) reported a major increase in television and online-video consumption and estimated that 12 million adults subscribed to a new streaming service during the initial lockdown. At the same time, global visits to piracy websites fell to 130 billion in 2020, according to MUSO (2020). By 2024, however, global piracy-site visits had risen to 216 billion (MUSO, 2024). Although website visits are not directly comparable with survey-based piracy rates, both indicators point to a renewed expansion of online piracy after pandemic, particularly in the film and television sectors.

II. Increase in the share of the population watching TV online.

The prevalence of online piracy is only one side of the equation which determines the number of users accessing illicit IPTV. Another is the overall share of the population watching television online. Eurostat reports that **48.42%** individuals in the EU27 watched internet streamed TV (live or catch-up) from TV broadcasters in 2024 – up from 39.29% in 2022, and 37.89% in 2020. The difference between 2020 and 2022 is modest. However, **9.13 percentage points increase**, equivalent to a **23% growth**, is recorded between 2022 and 2024. Proliferation of the access to internet streamed TV in the EU27 has expanded the population potentially exposed to both legal and illicit IPTV provision.

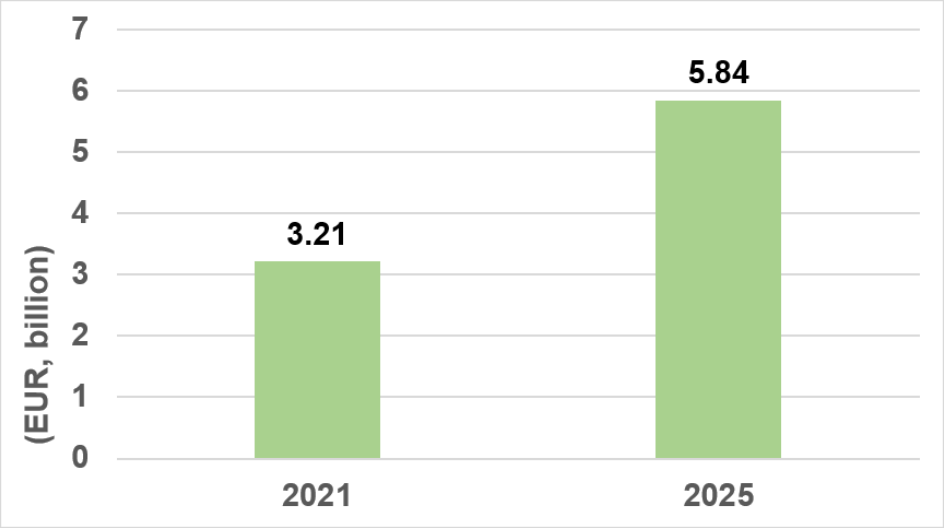
Figure 2. ILLICIT ANNUAL IPTV REVENUE IN EU27+ (2018-2025)



Note: 2018 data is from EUIPO (2019). 2021 data is from the AAPA (2022).

The present Study estimates that illicit IPTV providers generated **EUR 2.57 billion** in Europe[4] in 2025. As shown in Figure 2 above, this represents a sharp increase of 142% compared with 2021 (EUR 1.06 billion) and 173% compared with 2018 (EUR 0.94 billion).

Figure 3. ANNUAL REVENUE LOSSES INCURRED BY PAY-TV PROVIDERS IN EU27+ (2018-2025)



Note: 2021 data is from the AAPA (2022). 2018 data is missing as it was not reported by EUIPO (2019).

The present Study estimates that, in 2025, Pay-TV providers in Europe[5] incurred **EUR 5.84 billion** in potential annual revenue losses due to illicit IPTV consumption. This represents an increase of **82%** compared with the **EUR 3.21 billion** estimated by AAPA (2022) for 2021.

This growth is primarily driven by the rising number of users accessing unauthorised IPTV services. The results indicate that illicit IPTV continues to impose a substantial and increasing economic burden on legitimate audiovisual service providers, reducing revenues available for content acquisition, innovation, and future investment.

Staggering expansion of illicit IPTV use reflects two key trends: the growing proportion of the population accessing unauthorised IPTV services and consumers' increasing willingness to pay for such access. Illegal providers are increasingly operating through commercial subscription-based models, generating considerable untaxed revenues from copyright-infringing content. At the same time, their activities cause substantial revenue losses for Pay-TV providers in Europe and in other regions, with wider negative consequences for creators and rights holders, government tax revenues and employment. Sections 1 to 5 of this Report estimate these broader economic and fiscal effects.

[4] 2025 data is for the EU27 together with the UK and Switzerland (for comparison UK27+UK value is EUR 2.54 billion).
[5] 2025 data is for the EU27 together with the UK and Switzerland (for comparison UK27+UK value is EUR 5.76 billion).

SECTION 1. USERS OF ILLICIT IPTV

This section provides estimates of the magnitude of illicit IPTV. Two metrics are considered:

- number of individuals who use an unauthorised IPTV service; and
- the percentage share of population who access unauthorised IPTV.

The methodology is described in Annex A1. The share of population that uses illicit IPTV is estimated based on the data of population watching Internet streamed television (Eurostat). IPTV piracy is estimated based on online piracy rates provided by EUIPO (2023) report *European citizens and Intellectual Property. Perception, awareness and behaviour,* and EUIPO (2022) report *Intellectual Property and Youth Scoreboard*.

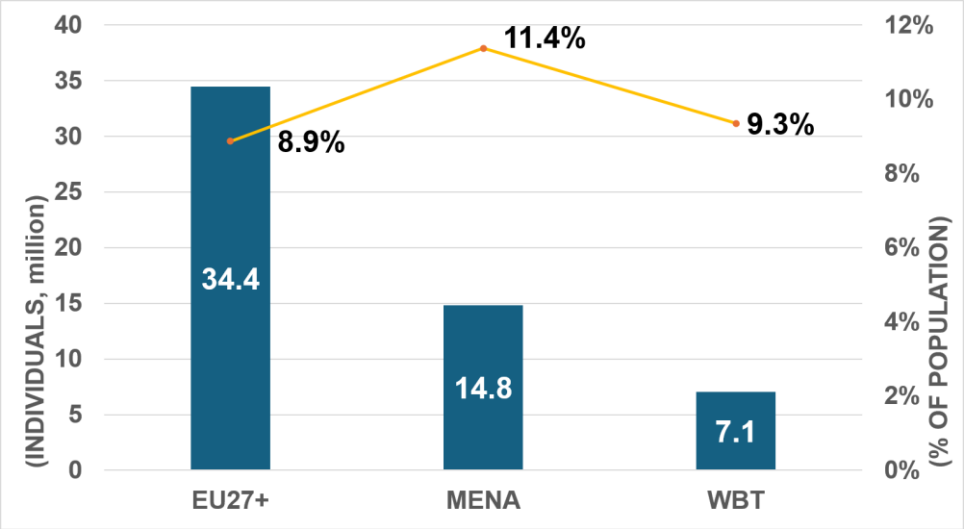
Main findings

34.4 million persons are estimated to use unauthorised IPTV services[6] in the EU27, the UK and Switzerland (EU27+). This represents **8.9% of the total population**[7] in this region.

11.4% of the population, representing 14.8 million persons, is estimated to use unauthorised IPTV in Algeria, Egypt and Morocco (MENA).

9.3% population – in total 7.1 million persons are estimated to use unauthorised IPTV across five Western Balkan economies – Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Serbia, and Türkiye (WBT).

Figure 4. USERS OF ILLICIT IPTV BY REGION (2025)



[6] I.e. Watch internet streamed TV (live or catch-up) from unauthorised online sources.
[7] Population aged 16-74.

Population share estimated to engage in the consumption of illicit IPTV services is similar across three regions, however MENA economies signal the highest propensity to use unauthorised IPTV (11.4% population), followed by WBT region (9.3%), and EU27+, where 8.9% population access illicit IPTV.

It is important to observe that three MENA economies studied comprise a high share of young population which tends to have higher online piracy rates. The detailed estimates by age group are provided in section 1.1 of this Report.

Table 2. POPULATION ACCESSING ILLICIT IPTV BY COUNTRY IN EU27+ (2025)

Country	Country code	Share of population accessing unauthorised IPTV	Number of individuals accessing unauthorised IPTV
Total	**EU27+**	**8.9%**	**34,439,256**
Austria	AT	6.8%	455,687
Belgium	BE	10.1%	859,736
Bulgaria	BG	5.2%	255,807
Croatia	HR	5.2%	153,935
Cyprus	CY	7.7%	53,797
Czechia	CZ	8.3%	654,296
Denmark	DK	11.4%	484,820
Estonia	EE	7.0%	68,100
Finland	FI	8.4%	337,730
France	FR	9.9%	4,774,262
Germany	DE	6.4%	3,930,247
Greece	EL	8.1%	619,618
Hungary	HU	9.2%	667,774
Ireland	IE	16.2%	627,764
Italy	IT	6.0%	2,663,870
Latvia	LV	6.5%	84,462
Lithuania	LT	8.1%	160,301
Luxembourg	LU	11.4%	58,166
Malta	MT	15.6%	66,590
Netherlands	NL	15.0%	1,962,742
Poland	PL	2.8%	787,791
Portugal	PT	8.0%	603,889
Romania	RO	3.5%	484,439
Slovakia	SK	4.7%	193,497
Slovenia	SI	10.9%	171,821
Spain	ES	14.6%	5,298,234
Sweden	SE	12.9%	982,407
Switzerland	CH	9.4%	634,227
United Kingdom	UK	12.3%	6,343,249

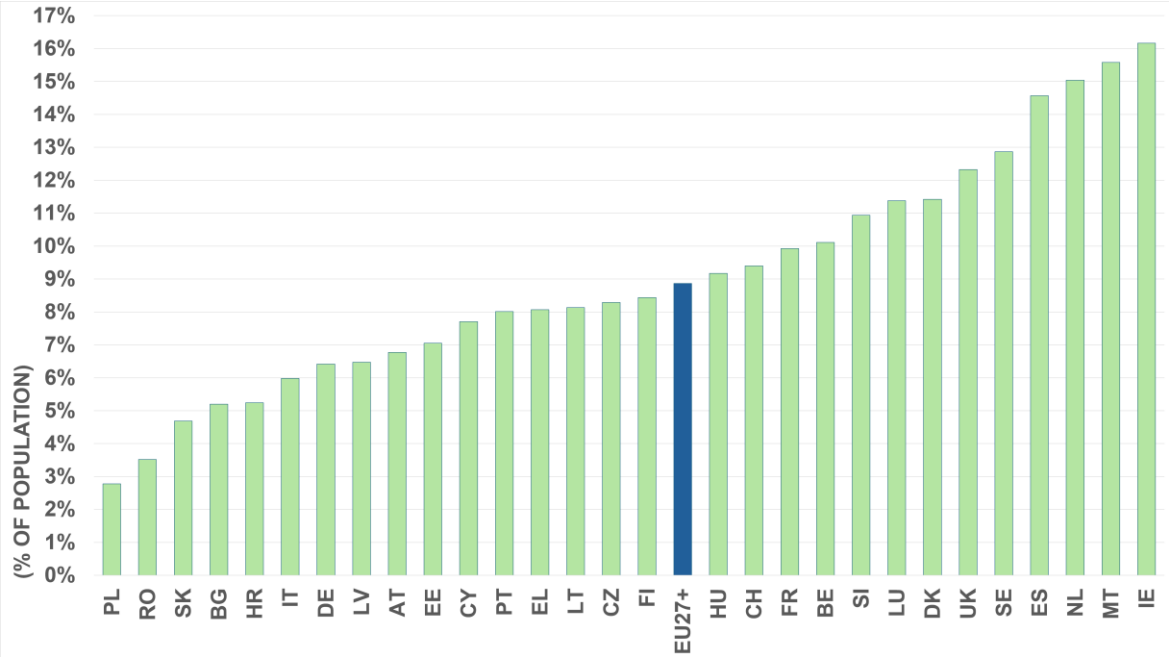
Table 2 presents the estimated share and absolute number of individuals accessing unauthorised IPTV services across all studied economies in EU27+.

Considerable variation exists between countries, ranging from relatively low IPTV piracy rates in Poland and Romania to substantially higher engagement in Ireland, Malta and Netherlands.

European countries with the highest number of persons streaming copyright infringing IPTV are the United Kingdom (6.3 million), Spain (5.3 million), France (4.8 million), Germany (3.9 million), Italy (2.7 million), and Netherlands (nearly 2 million). Close to 25 million individuals are estimated to have streamed unauthorised IPTV in these six countries in 2025. Together they comprise almost three quarters (73%) of EU27+ total population engaged in illicit IPTV consumption.

Due to their relatively small populations, economies such as Malta and Luxembourg account for only a small fraction (0.4%) of the total illicit IPTV user base in EU27+, despite having high shares of their populations accessing illicit IPTV services.

Figure 5. SHARE OF POPULATION USING ILLICIT IPTV BY COUNTRY IN EU27+ (2025)



Note: Percentage of population aged 16-74.

Figure 5 illustrates the percentage share of population accessing unauthorised IPTV services across countries.

Ireland tops the scale of illicit IPTV use as share of population (16.2%), followed closely by Malta (15.6%), Netherlands (15%), and Spain (14.6%).

The UK (12.3%) and Switzerland (9.4%) – two non-EU economies – exceed EU27+ average (8.9%) of illicit IPTV use. Above EU27+ average are also Sweden (12.9%), Denmark (11.4%), Luxembourg (11.4%), Slovenia (10.9%), Belgium (10.1%), France (9.9%), and Hungary (9.2%).

Poland (2.8%) and Romania (3.5%) are well below average EU27+ IPTV piracy rate – both lower than 4%. In Slovakia (4.7%), Bulgaria (5.2%), and Croatia (5.2%) less than 6% of population engage in illicit IPTV use.

Italy (6%), Germany (6.4%), Latvia (6.5%), Austria (6.8%), Estonia (7%), and Cyprus (7.7%) are below 8% mark.

Just below the EU27+ average are Portugal (8%), Greece (8.1%), Lithuania (8.1%), Czechia (8.3%), and Finland (8.4%).

The country-level patterns remain broadly the same as reported by AAPA in 2022. The cross-country differences reflect a combination of digital engagement, online viewing habits, affordability of legal content, demographic characteristics and country-specific audiovisual markets. The high estimated shares in Ireland and the Netherlands are consistent with their highly digitalised populations – Eurostat[8] reports that 67% and 75% population watch internet streamed TV (live or catch-up) – higher than EU27 average (48%). Furthermore, both Netherlands and Ireland have above-average overall online piracy rates (EUIPO, 2023). The high estimates for Malta and Luxembourg reflect their small total populations and internationally oriented audiovisual demand.

The comparatively low estimates for Poland and Romania are consistent with lower overall use of online television and video services. Eurostat reports that only 20% of individuals in Poland and Romania watch internet streamed TV (live or catch-up), compared with 48% of the population in the EU27. In addition, these two economies do not exhibit high online piracy ratios overall as reported by EUIPO (2023).

Table 3. POPULATION ACCESSING ILLICIT IPTV BY COUNTRY IN WBT (2025)

Country	Country code	Share of population accessing unauthorised IPTV	Number of individuals accessing unauthorised IPTV
Total	**WBT**	**9.3%**	**7,054,015**
Albania	AL	12.1%	255,728
Bosnia and Herzegovina	BA	5.4%	132,514
Montenegro	ME	12.1%	56,584
North Macedonia	MK	12.4%	172,078
Serbia	RS	7.2%	371,184
Türkiye	TR	9.5%	6,065,927

Table 3 presents the estimated share and absolute number of individuals accessing unauthorised IPTV services across all studied economies in WBT – Western Balkans and Türkiye.

As the largest economy, Türkiye represents 86% of the total population using unauthorised IPTV in this region – 6 million persons. Serbia has the highest number of unauthorised IPTV users among Western Balkan economies – 371 thousand persons, followed by Albania with 256 thousand persons engaged in consumption of copyright-infringing IPTV.

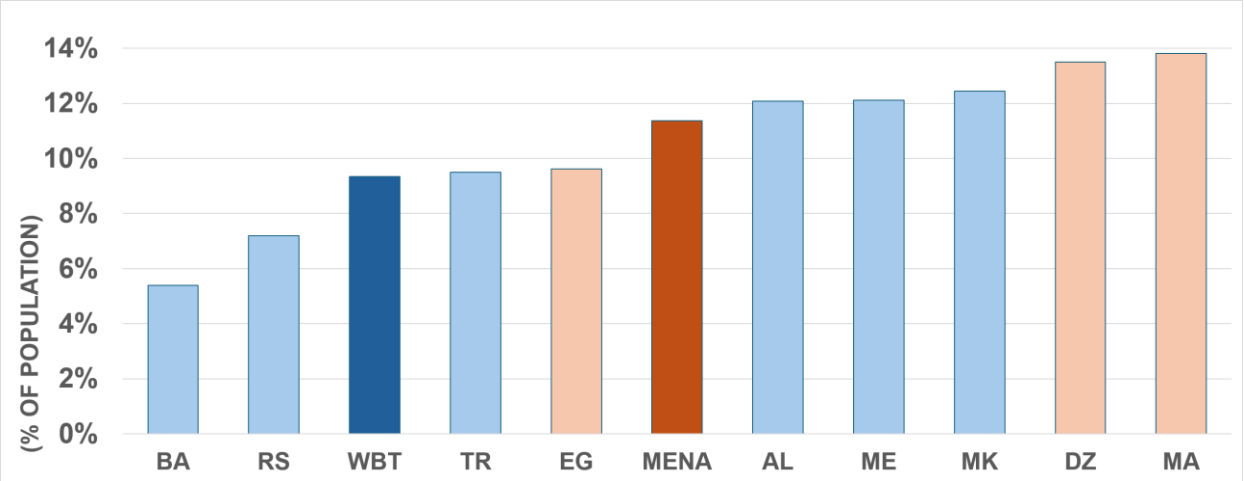
[8] The EU survey on the use of Information and Communication Technologies (ICT) in households and by individuals (2024).

Table 4. POPULATION ACCESSING ILLICIT IPTV BY COUNTRY IN MENA (2025)

Country	Country code	Share of population accessing unauthorised IPTV	Number of individuals accessing unauthorised IPTV
Total	**MENA**	**11.4%**	**14,838,151**
Algeria	DZ	13.5%	4,093,167
Egypt	EG	9.6%	7,101,011
Morocco	MA	13.8%	3,643,974

Table 4 presents the estimated share and absolute number of individuals accessing unauthorised IPTV services across all studied economies in MENA, Northern African economies. 7.1 million persons are estimated to use unauthorised IPTV services in Egypt, followed by 4.1 million persons in Algeria, and 3.6 million persons in Morocco.

Figure 6. SHARE OF POPULATION USING ILLICIT IPTV BY COUNTRY IN WBT AND MENA (2025)



Note: Percentage of population aged 16-74.

Figure 6 compares the share of population engaged in illicit IPTV use.

Among Western Balkan economies, North Macedonia (12.4%) exhibits the highest share of population using unauthorised IPTV, closely followed by Montenegro (12.1%), and Albania (12.1%). Türkiye – where 9.5% population is engaged in consumption of illicit IPTV – is just above total WBT regional average (9.3%). Bosnia and Herzegovina (5.4%) and Serbia (7.2%) are below the regional average. The distinction between economies is dictated by TV viewing channels. Eurostat reports that only 19.7% of population watch live television online in Bosnia and Herzegovina, and 28% in Serbia, while this share exceeds 37% in Albania, 45% in Montenegro and North Macedonia, and 34% in Türkiye.

Among three MENA economies Morocco (13.8%) demonstrates the highest level of population accessing illicit IPTV, closely followed by Algeria (13.5%). Egypt (9.6%) shows the lowest IPTV piracy rate in this region explained by a comparatively low share of population who can access TV online – only 33% population have such means. Over 50% population in both Morocco and Algeria are accessing television via internet.

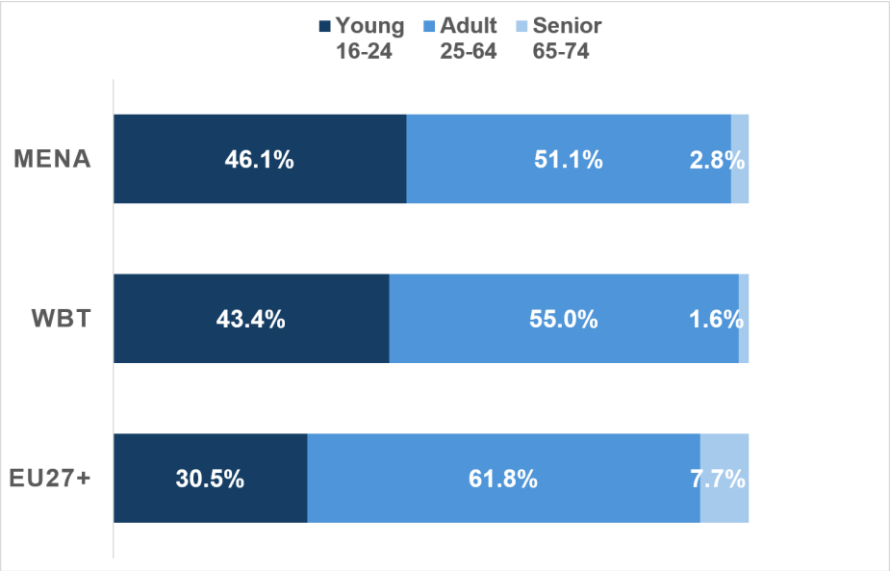
SECTION 1.1 USERS OF ILLICIT IPTV BY AGE GROUP

Sociodemographic differences are explored in accordance with the distribution of users of illicit IPTV by age group. The estimation is carried out on a regional level for the EU27, the UK and Switzerland (EU27+), Western Balkans and Türkiye (WBT), and Algeria, Egypt, and Morocco (MENA) in 2025. Furthermore, estimations are provided for each country. Three age groups are considered:

- 16-24 years (young);
- 25-64 years (adult); and
- 65-74 years (senior).

Figure 7 below shows regional estimates.

Figure 7. USERS OF ILLICIT IPTV BY AGE GROUP BY REGION (2025)



Three regions represent different demographic composition – in EU27+ only 30.5% of population that accessed illicit IPTV is aged 16-24. This region also demonstrates significant share of population (7.7%) aged 65-74 that is engaged in unauthorised IPTV consumption.

Conversely, in WBT (43.4%) and MENA (46.1%) – well over 40% population using illicit IPTV represents a very young demographic (16-24 years old).

Across all three regions the largest user base for unauthorised IPTV is the demographic group aged 25-64. This share is the highest in EU27+ (61.8%), followed by WBT (55%), and MENA (51.1%).

Tables 5, 6, and 7 below provide country-level estimates.

Table 5. POPULATION ACCESING ILLICIT IPTV BY AGE GROUP BY COUNTRY IN EU27+ (2025)

Country	Country code	Share of population accessing unauthorised IPTV				Number of individuals accessing unauthorised IPTV			
		Young 16-24	Adult 25-64	Senior 65-74	Total	Young 16-24	Adult 25-64	Senior 65-74	Total
Total	**EU27+**	**20.2%**	**7.7%**	**4.4%**	**8.9%**	**10,495,328**	**21,291,443**	**2,652,485**	**34,439,256**
Austria	AT	15.9%	6.0%	2.7%	**6.8%**	135,300	294,058	26,329	**455,687**
Belgium	BE	24.5%	8.4%	4.5%	**10.1%**	300,591	501,867	57,277	**859,736**
Bulgaria	BG	15.1%	4.5%	1.2%	**5.2%**	87,107	158,743	9,957	**255,807**
Croatia	HR	14.9%	4.7%	0.8%	**5.2%**	53,823	96,153	3,959	**153,935**
Cyprus	CY	15.6%	6.8%	4.2%	**7.7%**	15,341	34,609	3,848	**53,797**
Czechia	CZ	18.7%	7.5%	3.5%	**8.3%**	182,574	430,171	41,551	**654,296**
Denmark	DK	23.6%	9.8%	7.0%	**11.4%**	146,638	294,378	43,804	**484,820**
Estonia	EE	15.7%	6.4%	2.7%	**7.0%**	19,806	44,228	4,066	**68,100**
Finland	FI	16.5%	7.3%	6.3%	**8.4%**	92,114	203,565	42,051	**337,730**
France	FR	22.8%	8.2%	5.2%	**9.9%**	1,654,665	2,720,384	399,213	**4,774,262**
Germany	DE	14.5%	5.7%	3.6%	**6.4%**	1,071,715	2,501,748	356,785	**3,930,247**
Greece	EL	23.8%	6.5%	2.1%	**8.1%**	241,669	351,360	26,589	**619,618**
Hungary	HU	23.3%	7.7%	4.4%	**9.2%**	214,402	403,274	50,098	**667,774**
Ireland	IE	30.1%	13.9%	10.7%	**16.2%**	188,894	388,186	50,685	**627,764**
Italy	IT	17.0%	4.9%	2.3%	**6.0%**	921,731	1,574,387	167,752	**2,663,870**
Latvia	LV	14.4%	6.0%	2.8%	**6.5%**	23,456	54,877	6,129	**84,462**
Lithuania	LT	19.1%	7.6%	3.0%	**8.1%**	42,573	107,801	9,927	**160,301**
Luxembourg	LU	23.7%	10.1%	6.5%	**11.4%**	15,292	38,935	3,939	**58,166**
Malta	MT	39.7%	13.6%	7.6%	**15.6%**	18,371	43,744	4,474	**66,590**
Netherlands	NL	27.5%	13.3%	11.3%	**15.0%**	516,554	1,218,000	228,189	**1,962,742**
Poland	PL	7.8%	2.4%	0.6%	**2.8%**	264,825	495,555	27,412	**787,791**
Portugal	PT	23.8%	6.6%	2.0%	**8.0%**	225,637	352,725	25,527	**603,889**
Romania	RO	10.2%	2.9%	0.8%	**3.5%**	184,525	282,425	17,490	**484,439**
Slovakia	SK	14.5%	3.8%	1.3%	**4.7%**	70,887	114,542	8,068	**193,497**
Slovenia	SI	25.5%	9.7%	5.9%	**10.9%**	48,200	108,183	15,439	**171,821**
Spain	ES	35.3%	12.2%	7.4%	**14.6%**	1,689,589	3,217,364	391,280	**5,298,234**
Sweden	SE	24.9%	11.0%	9.1%	**12.9%**	286,213	600,156	96,038	**982,407**
Switzerland	CH	18.5%	8.4%	6.7%	**9.4%**	153,001	420,067	61,159	**634,227**
United Kingdom	UK	20.7%	11.6%	6.8%	**12.3%**	1,629,838	4,239,960	473,451	**6,343,249**

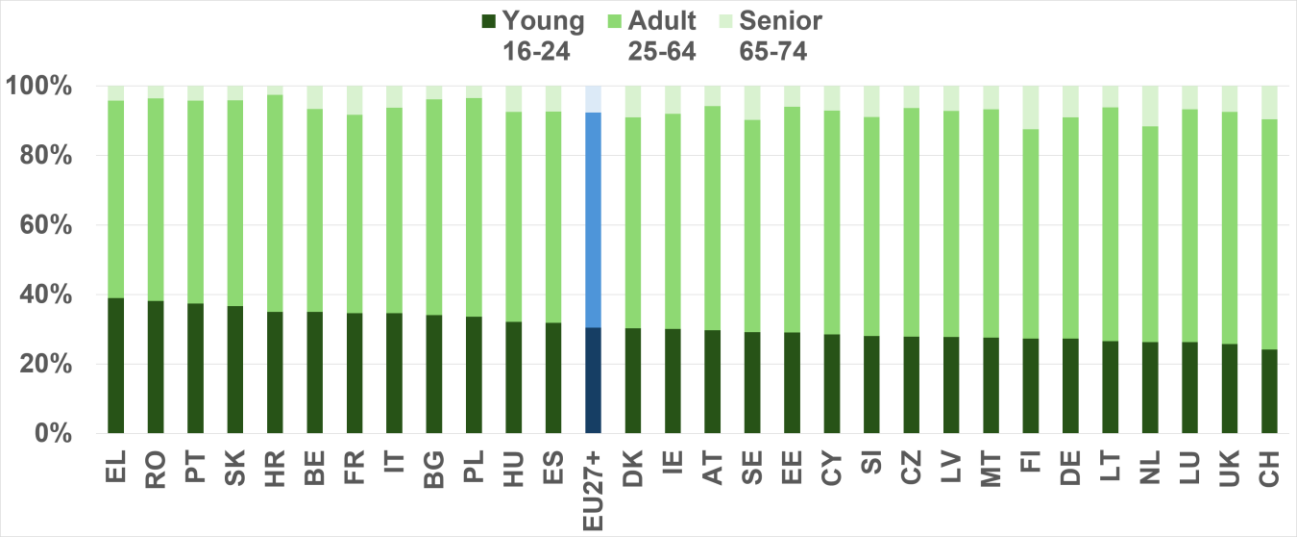
As evidenced in Table 5 above, 20.2% of EU27+ youth aged 16-24 access unauthorised IPTV – significantly higher than 8.9% of the overall population aged 16-74. Differences are also apparent when comparing people aged 25-64 – 7.7% population in this group use illicit IPTV – and population aged 65-74, among which only 4.4% Europeans engage in illicit IPTV use.

Such differences are explained by perception these age groups hold toward IP and piracy. Other factors such as average income, internet use, and TV viewing habits also influence decision to access illicit IPTV or simply affect the level of exposure to illicit online sources, and

risk tolerance when engaging with unverified channels. It is worthwhile noting that while the gap between age groups remains apparent, relative spread between age groups is closing. Estimates reported by AAPA (2022) showed wider disparity between age groups – with only 1.9% senior population accessing illicit IPTV. This share was estimated at 11.8% among young persons. Thus, we observe that youth piracy was six times the senior rate in 2022, compared with 4.6 times observed in the current 2026 report.

Estimates show the hotspot for youth IPTV piracy in EU27+ is Malta with almost 40% of young population (aged 16-24) accessing illicit IPTV. Spain ranks second (35.3%), and Ireland (30.1%) is the third highest country. On the lower end feature Poland (7.8%) and Romania (10.2%). Despite country level differences, the share of young people significantly surpasses that of the total population using illicit IPTV in every economy in EU27+.

Figure 8. USERS OF ILLICIT IPTV: DISTRIBUTION BY AGE GROUP BY COUNTRY IN EU27+ (2025)



As shown in Figure 8 above, the proportion of the population that access illicit IPTV in EU27+ varies by age group in each country. The average distribution in EU27+ shows that majority (61.8%) of people who access unauthorised IPTV are aged 25-64, 30.5% are aged 16-24, and the minority – 7.7% – are aged 65-74.

The young population is more engaged in IPTV piracy in Greece (39%), Romania (38.1%), Portugal (37.4%), Slovakia (36.6%), Croatia (35%), and Belgium (35%): 35% or more of all people who access illicit IPTV are younger than 25 years old in these countries.

On the other hand, young persons aged 16-24 constitute less than 27% of total users of illicit IPTV in the following five economies: Switzerland (24.1%), the UK (25.7%), Luxembourg (26.3%), Netherlands (26.3%), and Lithuania (26.6%).

Table 6. POPULATION ACCESSING ILLICIT IPTV BY AGE GROUP BY COUNTRY IN WBT (2025)

Country	Country code	Share of population accessing unauthorised IPTV				Number of individuals accessing unauthorised IPTV			
		Young 16-24	Adult 25-64	Senior 65-74	Total	Young 16-24	Adult 25-64	Senior 65-74	Total
Total	**WBT**	**22.9%**	**7.1%**	**1.5%**	**9.3%**	**3,061,767**	**3,879,063**	**113,185**	**7,054,015**
Albania	AL	39.1%	8.0%	1.1%	**12.1%**	132,335	120,257	3,135	**255,727.7**
Bosnia and Herzegovina	BA	14.9%	4.8%	0.9%	**5.4%**	45,361	83,345	3,809	**132,514.2**
Montenegro	ME	26.8%	10.7%	3.8%	**12.1%**	18,683	35,278	2,623	**56,584.0**
North Macedonia	MK	37.5%	9.6%	2.9%	**12.4%**	70,888	95,145	6,046	**172,078.3**
Serbia	RS	22.2%	6.0%	1.6%	**7.2%**	139,264	217,018	14,902	**371,183.8**
Türkiye	TR	22.5%	7.2%	1.5%	**9.5%**	2,655,236	3,328,021	82,670	**6,065,927.3**

Table 6 above shows the distribution of users of illicit IPTV by age group in Western Balkans and Türkiye (WBT). On average, 22.9% of young population access unauthorised IPTV in this region. Average share of population using unauthorised IPTV is 7.1% in the age group 25-64, and only 1.5% of persons aged 65-74 access illicit IPTV.

The share of youth engaging in consumption of illicit IPTV is highest in Albania where 39.1% of persons aged 16-24 engage in illicit IPTV consumption, followed closely by North Macedonia (37.5%). Bosnia and Herzegovina exhibit a moderate IPTV piracy rate among young demographics – with 14.9% young persons accessing IPTV via illegal channels – in line with countries' low access rate to internet TV.

Table 7. POPULATION ACCESSING ILLICIT IPTV BY AGE GROUP BY COUNTRY IN MENA (2025)

Country	Country code	Share of population accessing unauthorised IPTV				Number of individuals accessing unauthorised IPTV			
		Young 16-24	Adult 25-64	Senior 65-74	Total	Young 16-24	Adult 25-64	Senior 65-74	Total
Total	**MENA**	**23.8%**	**8.1%**	**4.9%**	**11.4%**	**6,841,426**	**7,584,440**	**412,286**	**14,838,151**
Algeria	DZ	30.3%	10.1%	6.0%	**13.5%**	1,677,116	2,294,502	121,549	**4,093,166.7**
Egypt	EG	19.8%	6.6%	3.9%	**9.6%**	3,537,042	3,397,055	166,914	**7,101,010.8**
Morocco	MA	30.1%	10.0%	6.0%	**13.8%**	1,627,268	1,892,883	123,822	**3,643,973.7**

As shown in Table 7 above, population younger than 25 is far more likely to access unauthorised IPTV in MENA economies. On average, youth IPTV piracy rate is 23.8%, compared with 8.1% in age group 25-64, and 4.9% in age group 65-74.

In Algeria and Morocco nearly 30% of youth is accessing illicit IPTV – well above average IPTV piracy rate of 14% in these economies. In Egypt the share of youth engaging in copyright-infringing IPTV use is close to 20% – considerably exceeding total population average (9.6%).

Figure 9. USERS OF ILLICIT IPTV: DISTRIBUTION BY AGE GROUP BY COUNTRY IN WBT AND MENA (2025)

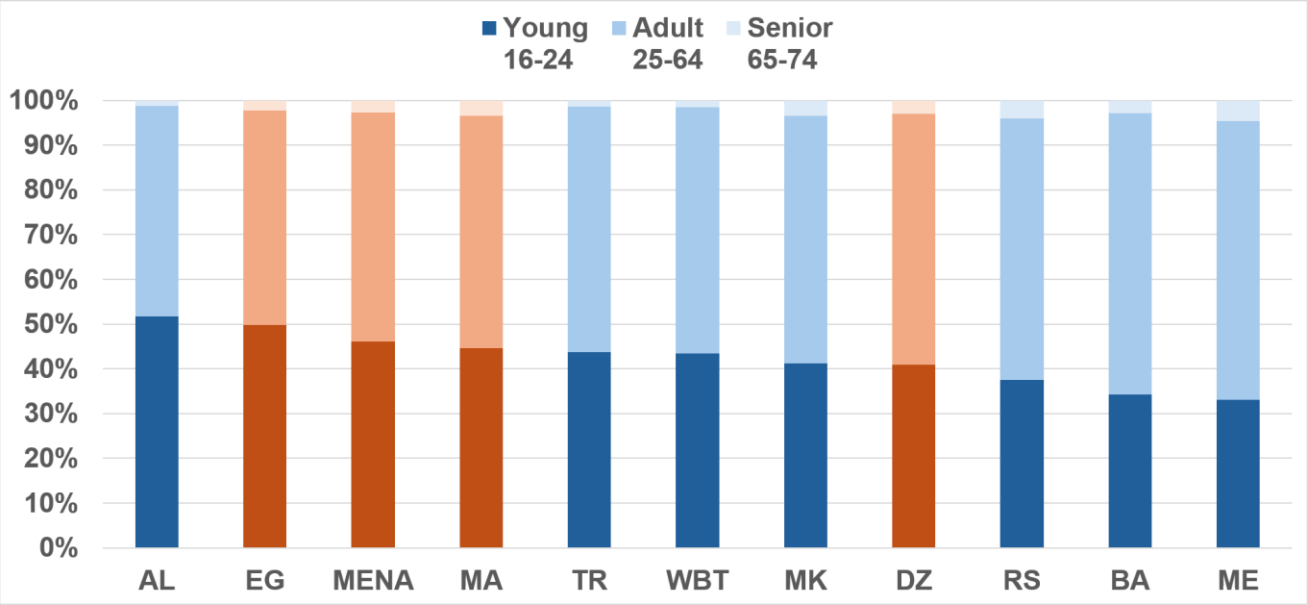


Figure 9 above shows distribution of users of unauthorised IPTV by age group in WBT and MENA. In most economies the largest share is represented by adult group aged 25-64 (ranging from 62% to 51%), except for Albania and Egypt, where young demographic is the largest user group of illicit IPTV.

In MENA, on average young users constitute 46.1% of total users of illicit IPTV. This share is slightly lower at average 43.4% in the region of Western Balkans and Türkiye.

Albania stands out as more than half – almost 52% – of the users of illicit IPTV are young people aged 16-24. It is closely followed by Egypt (50%), and Morocco (45%).

Young persons constitute much lower share of total illicit IPTV user base in Montenegro (33%), Bosnia and Herzegovina (34%), and Serbia (37.5%). Young persons represent 41% of all illicit IPTV users in Algeria – lowest share among three MENA economies.

Figure 10 below illustrates uneven distribution of IPTV piracy engagement by age groups in EU27+ economies.

In Slovakia, Portugal, Greece, Bulgaria, and Romania – the share of youth using illicit IPTV is nearly three times the share of total population average. Young population is also significantly more engaged in accessing pirated IPTV content compared to their overall population (aged 16-74) in Malta, Hungary, Spain, Belgium, and Romania.

Conversely, in Luxembourg, Denmark, Cyprus, Switzerland, Finland, Sweden, Ireland, Netherlands, and the UK youth access illicit IPTV at a rate closer to its national average. However, in these economies youth IPTV infringement rate are still at least 1.7-2 times higher than average national IPTV infringement rate.

Figure 10. YOUNG USERS (AGED 16-24) OF ILLICIT IPTV BY COUNTRY in EU27+ (2025)

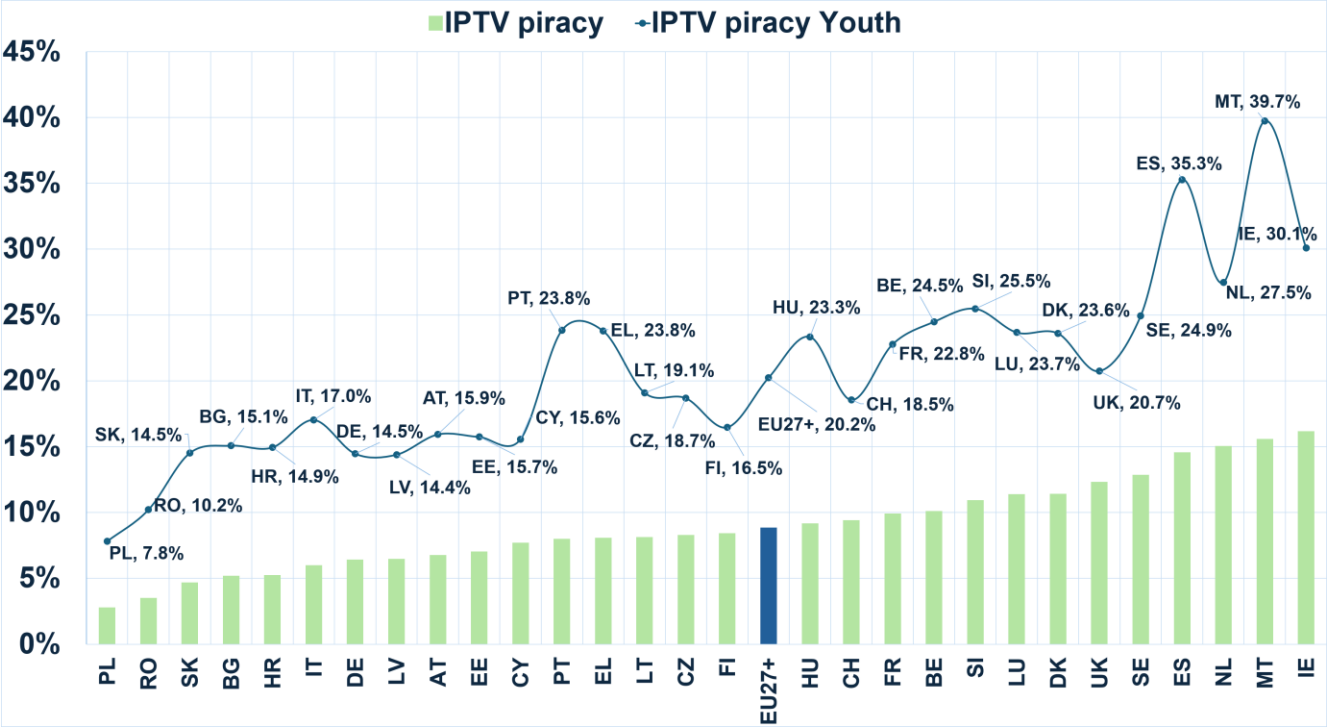
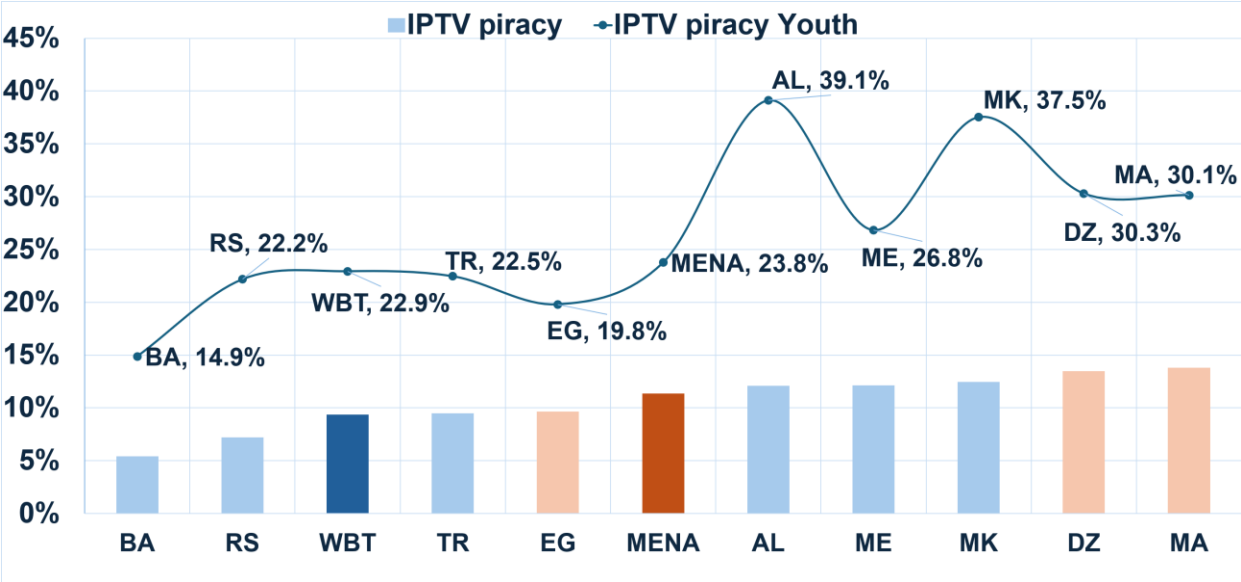


Figure 11 below graphs the disparity between share of young population using illicit IPTV and national average IPTV piracy rates in WBT and MENA in 2025.

Figure 11. YOUNG USERS (AGED 16-24) OF ILLICIT IPTV BY COUNTRY in WBT AND MENA (2025)



On average, the rate of illicit IPTV use among young people in the Western Balkans, Türkiye and MENA is 2–2.5 times the corresponding rate among the total population, reflecting the same pattern observed in EU27+ economies.

SECTION 2. REVENUE GENERATED BY ILLICIT IPTV PROVIDERS

This section estimates the revenue that is generated by providers of unauthorised IPTV subscription services. Two metrics are considered:

- Total Revenue generated by illegal providers; and
- Cost per user – estimated as average price of illicit IPTV.

The assessment is carried out for the EU27+, Western Balkans and Türkiye, and MENA economies as well as for each individual country.

The methodology is described in Annex A2. The revenue that is generated by illicit IPTV service providers is estimated on the basis of the population using illicit IPTV. The unauthorised IPTV subscription user base is assumed to be one per household. The subscription prices charged and the share of users opting for either pay or free unauthorised IPTV are estimated based on 1673 suspected, unauthorised IPTV websites supplied by AAPA members.

Main findings

Sales of copyright-infringing IPTV service subscriptions generated **EUR 2.6 billion of unlawful revenue in EU27+ in 2025.**

EUR 313 million was generated in WBT – Western Balkans and Türkiye region in 2025.

MENA economies (Algeria, Egypt and Morocco) accrued EUR 192 million unlawful revenue to illicit IPTV providers.

Figure 12. ILLICIT IPTV REVENUE BY REGION (2025)

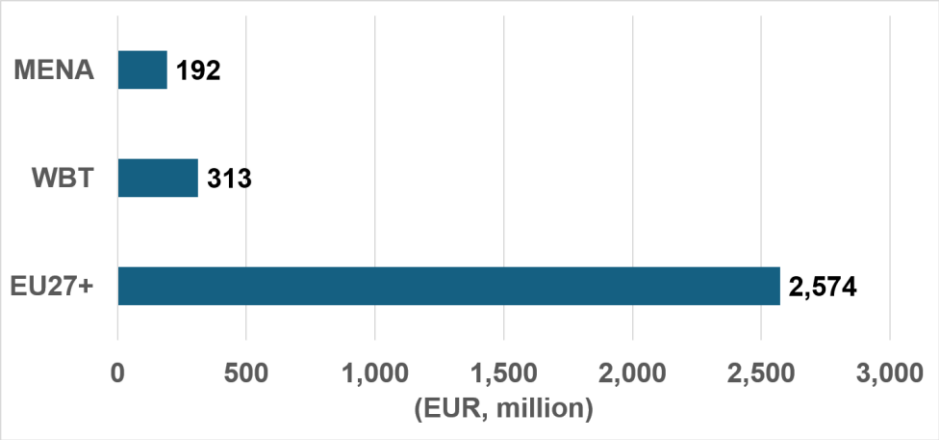


Table 8. ILLICIT IPTV REVENUE BY COUNTRY IN EU27+ (2025)

Country	Country code	Monthly Illegal Revenue (million EUR)	Annual Illegal Revenue (million EUR)
Total	**EU27+**	**214.48**	**2,573.74**
Austria	AT	3.07	36.85
Belgium	BE	5.51	66.09
Bulgaria	BG	0.97	11.64
Croatia	HR	0.49	5.89
Cyprus	CY	0.18	2.13
Czechia	CZ	2.43	29.19
Denmark	DK	3.45	41.35
Estonia	EE	0.26	3.16
Finland	FI	2.52	30.26
France	FR	32.17	386.08
Germany	DE	28.33	339.90
Greece	EL	3.78	45.39
Hungary	HU	2.44	29.24
Ireland	IE	3.66	43.92
Italy	IT	17.39	208.65
Latvia	LV	0.32	3.79
Lithuania	LT	0.67	8.02
Luxembourg	LU	0.38	4.61
Malta	MT	0.40	4.82
Netherlands	NL	13.40	160.81
Poland	PL	2.57	30.83
Portugal	PT	3.69	44.24
Romania	RO	1.51	18.13
Slovakia	SK	0.60	7.25
Slovenia	SI	0.60	7.21
Spain	ES	32.73	392.75
Sweden	SE	6.80	81.56
Switzerland	CH	3.02	36.23
United Kingdom	UK	41.14	493.73

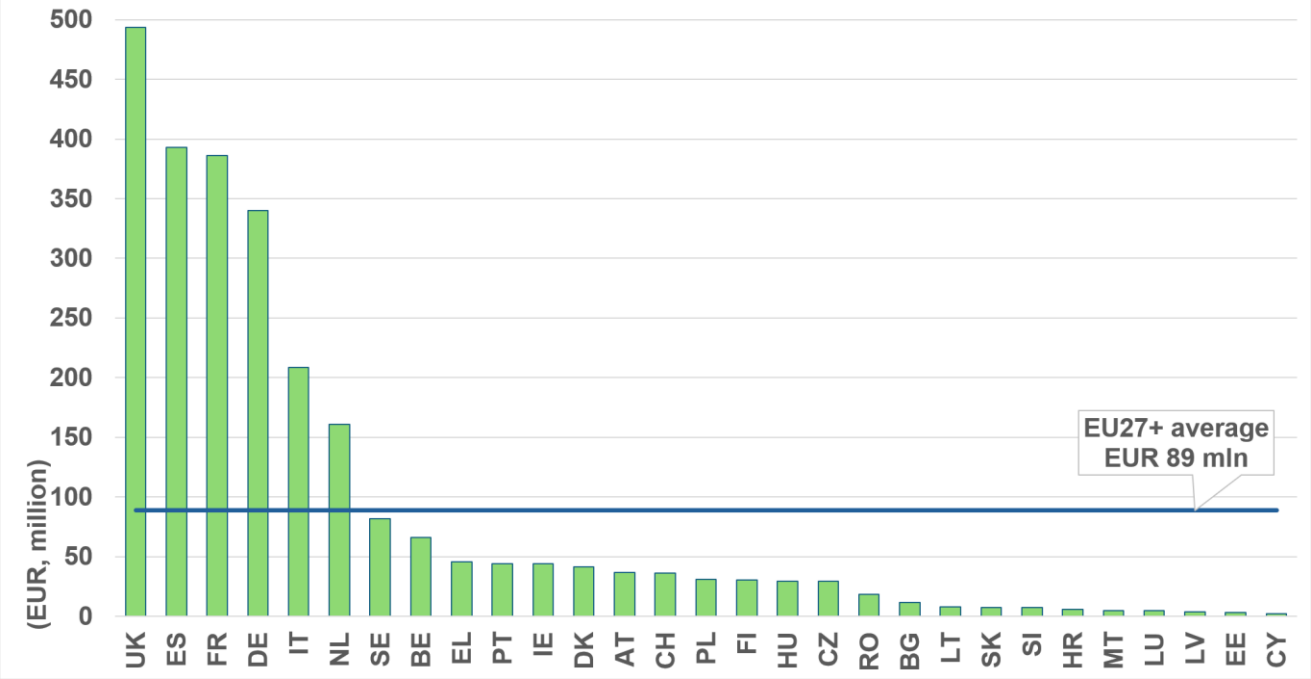
Results in Table 8 above show both monthly and annual income accrued from sales of illicit IPTV subscriptions in European economies.

Largest European countries generate lion's share of the sales of access to illicit IPTV providers. Top six economies – United Kingdom (EUR 494 million), Spain (EUR 393 million), France (EUR 386 million), Germany (EUR 340 million), Italy (EUR 209 million), and Netherlands (EUR 161 million) – account for 77% of all sales of illicit IPTV in EU27+ region.

Illegal annual revenue is below EUR 10 million level in smaller markets: Lithuania, Slovakia, Slovenia, Croatia, Malta, Luxembourg, Latvia, Estonia, and Cyprus – together these nine

economies accrue 1.8% total sales – EUR 47 million – of illicit IPTV in EU27+. Even such small markets provide an average illegal income stream of EUR 400 thousand per month.

Figure 13. ILLICIT IPTV REVENUE BY COUNTRY IN EU27+ (2025)



As shown in Figure 13 above, users in EU27+ on average pay EUR 89 million per year (or EUR 7.4 million per month) to access illicit IPTV.

Well above this average rate are largest six markets that generate over EUR 100 million annual income stream to illicit IPTV providers. The UK tops the chart with nearly EUR 500 million illegal revenue, followed by Spain (EUR 393 million), France (EUR 386 million), and Germany (EUR 340 million). Italian market produces EUR 209 million EUR turnover, and Netherlands provide EUR 161 million unlawful income stream for illicit IPTV providers.

Markets with annual illegal revenues below the EU27+ average are generally less populous economies. However, the illegal revenues accrued by unauthorised IPTV providers depend not only on a country's total population but also on its online piracy rate and access to digital TV networks. Consequently, countries of substantially different sizes may generate similar revenue streams for illicit IPTV providers. For example, Poland generates EUR 31 million annually – nearly as much as Switzerland (EUR 36 million) and Austria (EUR 37 million) – despite its significantly larger population.

Table 9. ILLICIT IPTV REVENUE BY COUNTRY IN WBT+ (2025)

Country	Country code	Monthly Illegal Revenue (million EUR)	Annual Illegal Revenue (million EUR)
Total	**WBT**	**26.12**	**313.45**
Albania	AL	0.63	7.60
Bosnia and Herzegovina	BA	0.29	3.47
Montenegro	ME	0.24	2.85
North Macedonia	MK	0.67	8.00
Serbia	RS	1.71	20.47
Türkiye	TR	22.59	271.06

Results in Table 9 above show both monthly and annual income accrued from sales of illicit IPTV subscriptions in WBT economies.

Türkiye is the largest market generating over EUR 271 million in annual income to illicit IPTV suppliers. Serbia presents the largest revenue share among five Western Balkan economies and accrues a little more that EUR 20 million annual revenue.

Table 10. ILLICIT IPTV REVENUE BY COUNTRY IN MENA+ (2025)

Country	Country code	Monthly Illegal Revenue (million EUR)	Annual Illegal Revenue (million EUR)
Total	**MENA**	**15.99**	**191.88**
Algeria	DZ	3.96	47.55
Egypt	EG	8.22	98.67
Morocco	MA	3.81	45.66

The results presented in Table 10 show the monthly and annual revenue generated from sales of illicit IPTV subscriptions in the three MENA economies.

Egypt is the most lucrative market for illicit IPTV providers, generating EUR 98.7 million in untaxed revenue annually. Algeria and Morocco generate annual illicit revenues of EUR 47.6 million and EUR 45.7 million, respectively.

Figure 14. ILLICIT IPTV REVENUE BY COUNTRY IN WBT (2025)

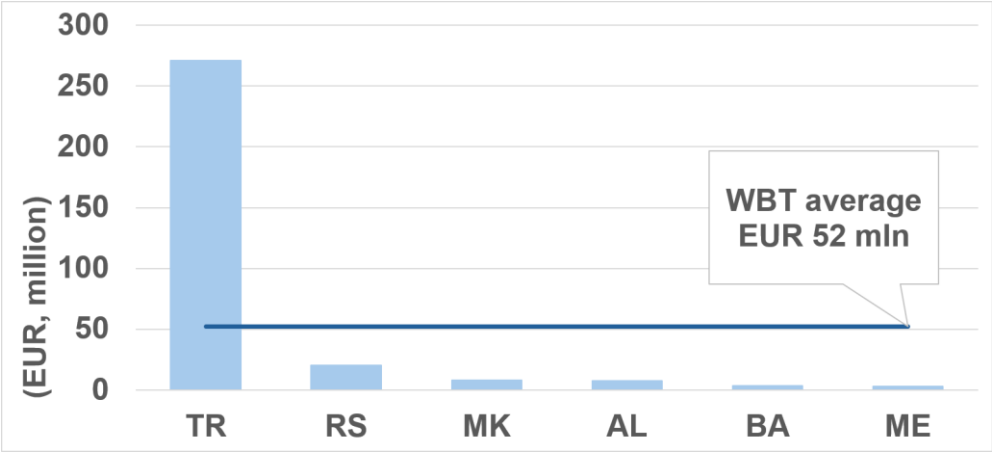


Figure 14 above demonstrates that WBT generates average EUR 52 million illicit IPTV revenue per year equivalent to EUR 4.3 million per month. Türkiye, the region's largest market, tops the chart generating EUR 271 million illegal annual revenue.

Across the five Western Balkan economies, average illicit revenue amounts to EUR 8.5 million annually, allowing illicit IPTV providers to cash in nearly EUR 700 thousand per month in each market.

Figure 15. ILLICIT IPTV REVENUE BY COUNTRY IN MENA (2025)

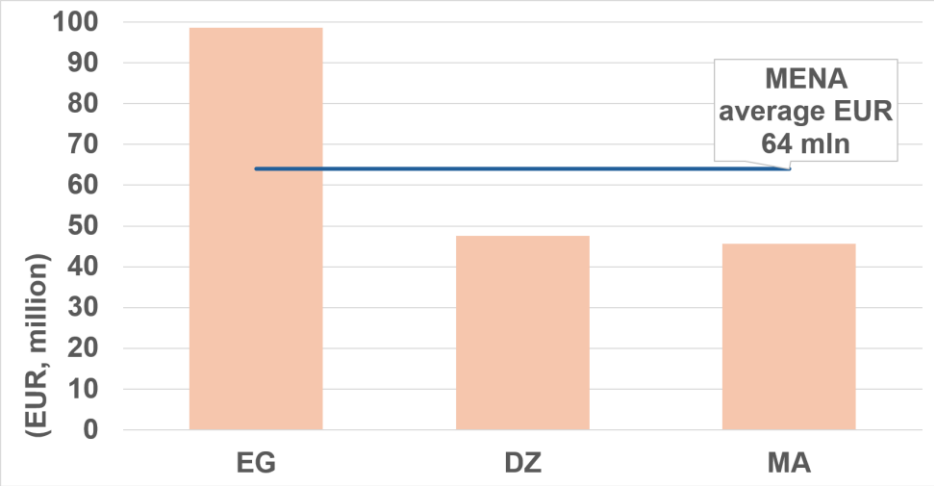


Figure 15 illustrates annual illicit IPTV revenue across the three MENA economies in Northern Africa.

On average this market generates EUR 64 million annual revenue for illicit IPTV suppliers, equivalent to monthly income stream of EUR 5.3 million.

Egypt generates the highest revenue in the region, at EUR 98.7 million per year. By comparison, Algeria and Morocco generate EUR 47.6 million and EUR 45.7 million annually, respectively, both below the MENA average.

SECTION 2.1 ILLICIT IPTV COST PER USER

This sub-section estimates average illicit IPTV spending per user on a regional and country-level. Estimates are provided as average annual and monthly spending to access unauthorised IPTV. These costs are driven by illicit IPTV subscription sales.

Main findings

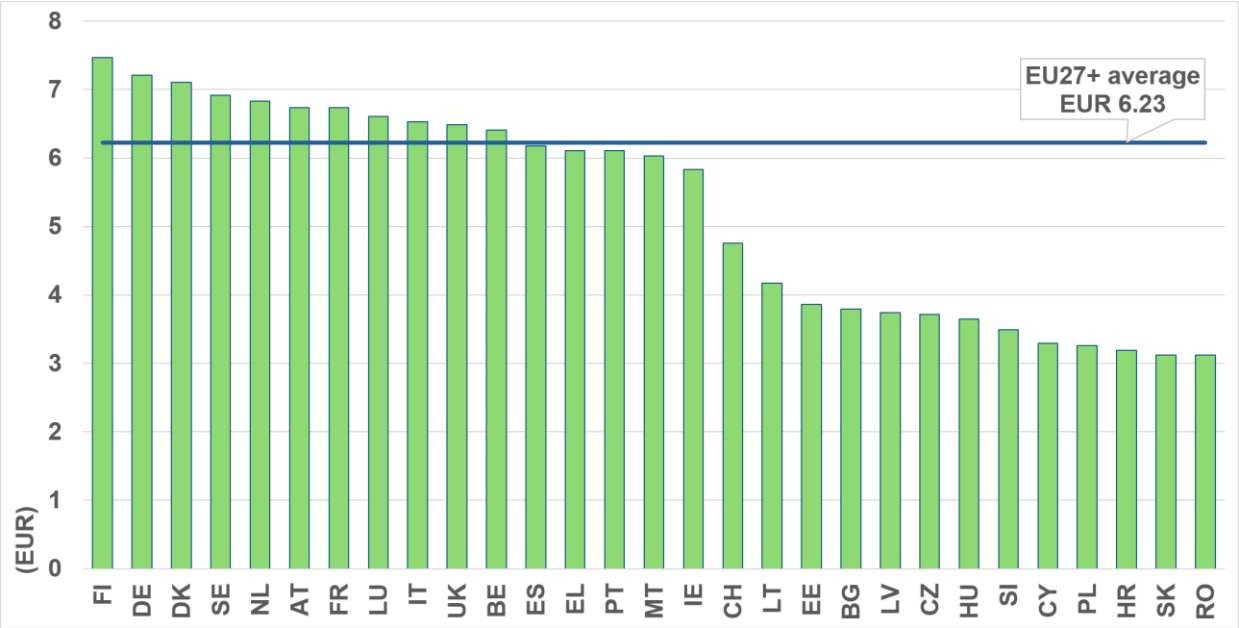
Users in **EU27+ on average spend EUR 6.23 per month to access illicit IPTV**.

In WBT – Western Balkans and Türkiye region – **users expend EUR 3.70 per month** to view illicit IPTV.

In MENA economies (Algeria, Egypt and Morocco) average **cost of illicit IPTV streaming amounts to EUR 1.08 per month.**

Figures 16-18 below graph the monthly average cost of accessing illicit IPTV by country.

Figure 16. MONTHLY ILLICIT IPTV COST PER USER BY COUNTRY IN EU27+ (2025)



Estimates for EU27+ presented in Figure 16 and Table 11 show that the cost to view illicit IPTV is not uniform across European economies. Romania (EUR 3.12) and Slovakia (EUR 3.12) are the two markets where average cost to access illicit IPTV is the lowest.

Economies in Central and Eastern Europe also feature low costs below 4 EUR mark: Croatia (EUR 3.19), Poland (EUR 3.26), Slovenia (EUR 3.50), Hungary (EUR 3.65), Czechia (EUR 3.72), Latvia (EUR 3.74), Bulgaria (EUR 3.79), Estonia (EUR 3.87), and Lithuania (EUR 4.17).

In Cyprus it costs EUR 3.30 per month to view illicit IPTV – comparable to Central and Eastern European economies.

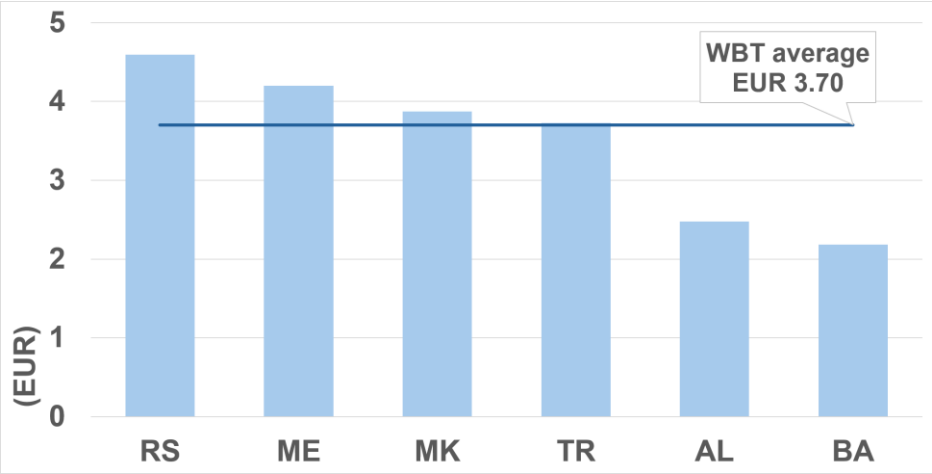
In Switzerland monthly cost is EUR 4.76. Switzerland's comparatively low illicit IPTV subscription price may partly reflect the wide availability of legal, free online television services. For example, Teleboy provides free live access to more than 300 television channels in Switzerland, potentially reducing consumers' willingness to pay for unauthorised alternatives.

Finland (EUR 7.47), Germany (EUR 7.21), and Denmark (EUR 7.11) are relatively more expensive markets for users of illicit IPTV, where the average monthly cost exceeds EUR 7.

Table 11. AVERAGE ILLICIT IPTV COST PER USER BY COUNTRY IN EU27+ (2025)

Country	Country code	Monthly cost per user (EUR)	Annual cost per user (EUR)
Total	**EU27+**	**6.23**	**74.73**
Austria	AT	6.74	80.87
Belgium	BE	6.41	76.87
Bulgaria	BG	3.79	45.49
Croatia	HR	3.19	38.28
Cyprus	CY	3.30	39.58
Czechia	CZ	3.72	44.62
Denmark	DK	7.11	85.30
Estonia	EE	3.87	46.39
Finland	FI	7.47	89.59
France	FR	6.74	80.87
Germany	DE	7.21	86.48
Greece	EL	6.10	73.26
Hungary	HU	3.65	43.78
Ireland	IE	5.83	69.96
Italy	IT	6.53	78.32
Latvia	LV	3.74	44.90
Lithuania	LT	4.17	50.04
Luxembourg	LU	6.61	79.32
Malta	MT	6.03	72.40
Netherlands	NL	6.83	81.93
Poland	PL	3.26	39.14
Portugal	PT	6.10	73.26
Romania	RO	3.12	37.43
Slovakia	SK	3.12	37.46
Slovenia	SI	3.50	41.95
Spain	ES	6.18	74.13
Sweden	SE	6.92	83.02
Switzerland	CH	4.76	57.13
United Kingdom	UK	6.49	77.84

Figure 17. MONTHLY ILLICIT IPTV COST PER USER BY COUNTRY IN WBT+ (2025)



Estimates for WBT economies are illustrated in Figure 17 and Table 12.

Table 12. AVERAGE ILLICIT IPTV COST PER USER BY COUNTRY IN WBT+ (2025)

Country	Country code	Monthly cost per user (EUR)	Annual cost per user (EUR)
Total	**WBT**	**3.70**	**44.44**
Albania	AL	2.48	29.71
Bosnia and Herzegovina	BA	2.19	26.22
Montenegro	ME	4.20	50.40
North Macedonia	MK	3.87	46.47
Serbia	RS	4.60	55.15
Türkiye	TR	3.72	44.69

The cost to view illicit IPTV are above regional average in Serbia (EUR 4.60), Montenegro (EUR 4.20), and North Macedonia (EUR 3.87).

Albania, and Bosnia and Herzegovina have lower monthly costs of EUR 2.48 and EUR 2.19, respectively. Türkiye is close to regional average – it costs EUR 3.72 per month to view illicit IPTV in this country.

Figure 18. MONTHLY ILLICIT IPTV COST PER USER BY COUNTRY IN MENA (2025)

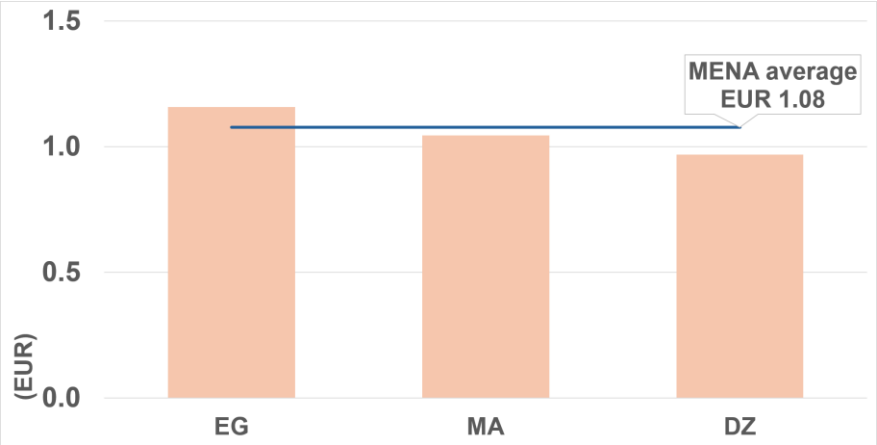


Figure 18 and Table 13 provide estimates for average cost to access illicit IPTV in MENA economies.

Table 13. AVERAGE ILLICIT IPTV COST PER USER BY COUNTRY IN MENA (2025)

Country	Country code	Monthly cost per user (EUR)	Annual cost per user (EUR)
Total	**MENA**	**1.08**	**12.93**
Algeria	DZ	0.97	11.62
Egypt	EG	1.16	13.90
Morocco	MA	1.04	12.53

Average monthly cost to view illicit IPTV is very low at EUR 1.08. All three Northern African economies are close to this average, with the monthly cost per user at EUR 1.16 in Egypt, EUR 1.04 EUR in Morocco, and EUR 0.97 in Algeria.

SECTION 3. LOSSES INCURRED BY LEGAL IPTV PROVIDERS

This section provides estimates of the potential losses incurred by legal Pay-TV providers due to illicit IPTV presence. The assessment is carried out for the entire EU27+ market, WBT market, and MENA market consisting of Algeria, Egypt, and Morocco. Furthermore, country-level assessments are carried out.

The methodology is described in Annex A3. Potential revenue losses to legal Pay-TV providers are estimated using the number of households that use illicit IPTV services, as estimated in Section 2. The calculation assumes one potential lost subscription per household, rather than per individual user, and adjusts the estimate to reflect the share of users willing to pay for an illicit IPTV subscription. This share is based on data supplied by AAPA members. Information on legal Pay-TV providers is obtained from the European Audiovisual Observatory. The results should be interpreted as potential revenue losses.

Main findings

Legal Pay-TV providers incurred **potential losses in revenue of EUR 5.84 billion in EU27, the UK, and Switzerland (EU27+)** due to pirated services in 2025.

Potential revenue losses are estimated at EUR 480 million in MENA region in 2025.

In Western Balkan economies and Türkiye (WBT) potential losses in revenue are estimated at EUR 130 million in 2025.

Figure 19. LOSSES INCURRED BY LEGAL PAY-TV PROVIDERS BY REGION (2025)

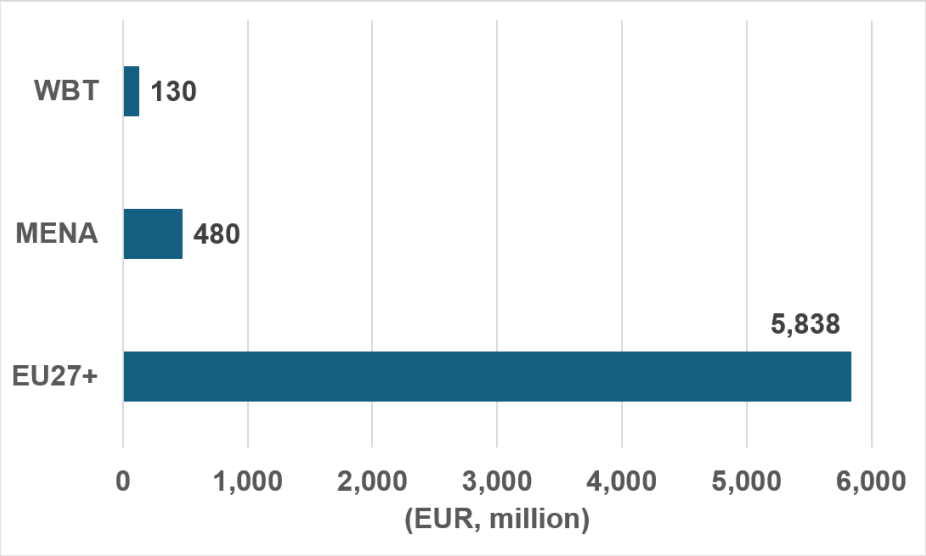


Table 14. LOSSES INCURRED BY LEGAL PAY-TV PROVIDERS BY COUNTRY IN EU27+ (2025)

Country	Country code	Monthly Revenue Losses (million EUR)	Annual Revenue Losses (million EUR)
Total	**EU27+**	**486.5**	**5,838.5**
Austria	AT	3.7	44.1
Belgium	BE	11.9	142.6
Bulgaria	BG	1.5	18.6
Croatia	HR	1.1	13.6
Cyprus	CY	0.3	4.1
Czechia	CZ	4.1	49.0
Denmark	DK	14.7	175.8
Estonia	EE	0.5	6.4
Finland	FI	3.1	37.2
France	FR	44.7	536.8
Germany	DE	135.9	1,630.7
Greece	EL	5.8	69.6
Hungary	HU	4.7	56.4
Ireland	IE	8.4	100.8
Italy	IT	20.9	250.5
Latvia	LV	0.5	6.1
Lithuania	LT	1.3	15.4
Luxembourg	LU	0.8	9.0
Malta	MT	0.6	6.9
Netherlands	NL	20.0	240.0
Poland	PL	4.2	49.9
Portugal	PT	7.5	89.6
Romania	RO	1.4	17.0
Slovakia	SK	1.0	12.1
Slovenia	SI	1.2	14.2
Spain	ES	73.6	882.9
Sweden	SE	12.9	154.6
Switzerland	CH	6.3	75.8
United Kingdom	UK	94.1	1,128.9

Table 14 above presents estimated annual revenue losses incurred by legitimate audiovisual service providers in EU27+ economies. Losses vary substantially according to market size, subscription pricing, and the prevalence of illicit IPTV consumption.

Figure 20. LOSSES INCURRED BY LEGAL PAY-TV PROVIDERS BY COUNTRY IN EU27+ (2025)

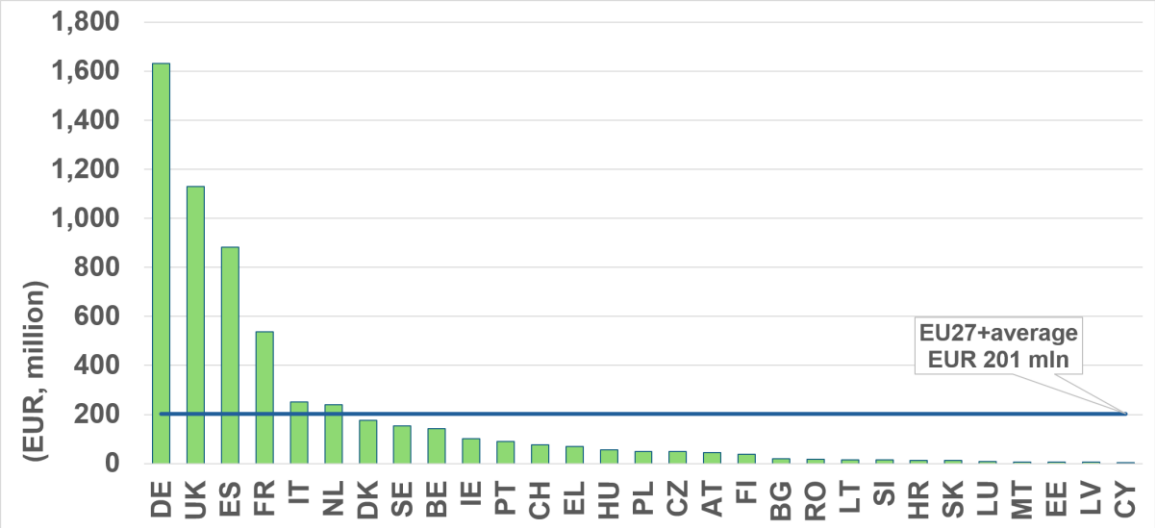


Figure 20 contrasts the potential losses in revenue to Pay-TV providers in EU27+ markets with the regional average. On average, Pay-TV providers in Europe incur EUR 201 million annual loss in their income due to illicit IPTV.

The highest revenue losses in absolute values are estimated in Germany, the UK, Spain, and France.

Table 15. LOSSES INCURRED BY LEGAL PAY-TV PROVIDERS BY COUNTRY IN WBT (2025)

Country	Country code	Monthly Losses (million EUR)	Annual Losses (million EUR)
Total	**WBT**	**10.9**	**130.4**
Albania	AL	0.9	11.3
Bosnia and Herzegovina	BA	0.4	4.5
Montenegro	ME	0.2	2.2
North Macedonia	MK	0.6	6.6
Serbia	RS	1.8	22.2
Türkiye	TR	7.0	83.6

Table 15 above presents estimated annual revenue losses incurred by legitimate audiovisual service providers in WBT economies.

Figure 21. LOSSES INCURRED BY LEGAL PAY-TV PROVIDERS BY COUNTRY IN WBT (2025)

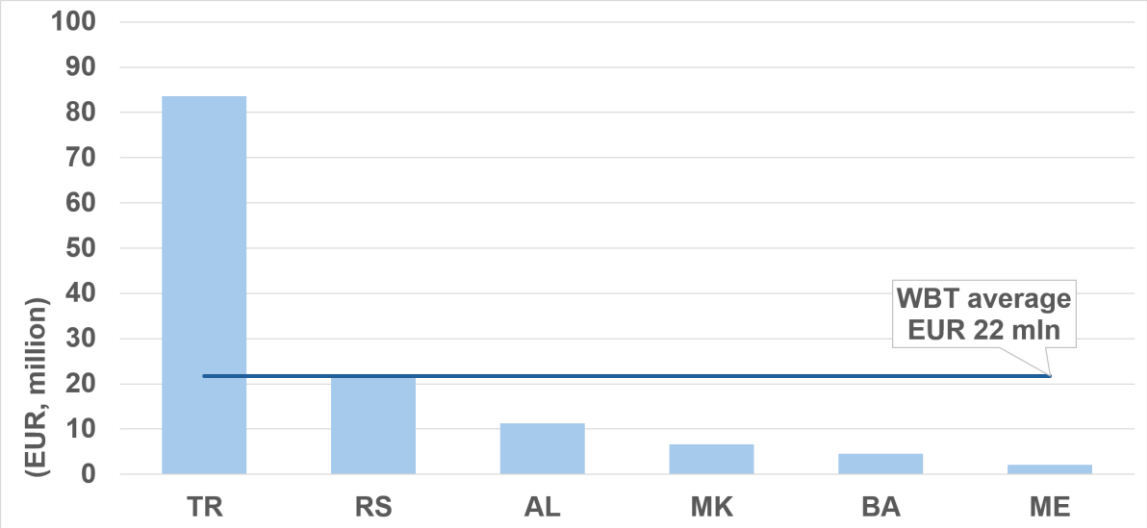


Figure 21 shows the potential losses in revenue to Pay-TV providers in Western Balkans and Türkiye (WBT). On average, in 2025 Pay-TV providers in this region saw EUR 22 million loss in annual revenue caused by illicit IPTV.

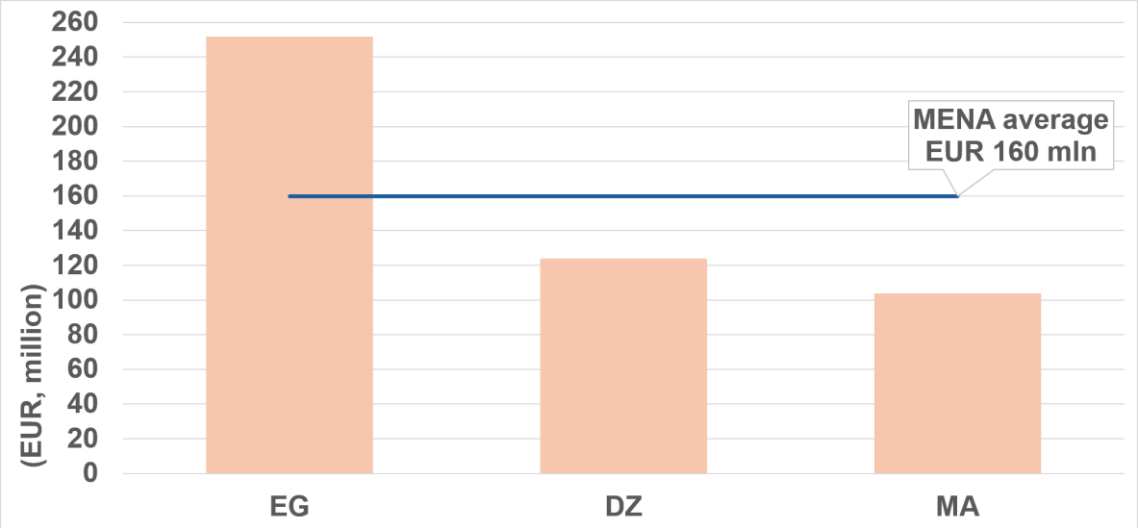
In absolute terms, Türkiye and Serbia top the chart in WBT region.

Table 16. LOSSES INCURRED BY LEGAL PAY-TV PROVIDERS BY COUNTRY IN MENA (2025)

Country	Country code	Monthly Losses (million EUR)	Annual Losses (million EUR)
Total	**MENA**	**40.0**	**479.6**
Algeria	DZ	10.3	123.9
Egypt	EG	21.0	251.9
Morocco	MA	8.6	103.8

Table 16 above presents estimated annual revenue losses incurred by legitimate audiovisual service providers in MENA economies.

Figure 22. LOSSES INCURRED BY LEGAL PAY-TV PROVIDERS BY COUNTRY IN MENA (2025)



As outlined in Figure 22, potential losses in revenue to Pay-TV providers in MENA region stand at EUR 160 million.

Illicit IPTV in Egypt potentially reduce annual Pay-TV income by EUR 252 million, whereas potential revenue losses are estimated at nearly EUR 124 million in Algeria, and EUR 104 million in Morocco.

SECTION 4. FISCAL EFFECTS

This section provides estimates of the potential fiscal losses incurred by governments due to illicit IPTV. The assessment is carried out at a regional level for EU27, the UK, and Switzerland (EU27+), Western Balkans and Türkiye (WBT), and Algeria, Egypt, and Morocco (MENA). Moreover, country-level assessments are carried out.

Two types of taxes are considered:

- Value Added Tax (VAT) paid by consumers; and
- Corporate Income Tax (CIT) paid by Pay-TV providers.

The methodology is described in the Annex A4. Fiscal effects are estimated based on the varying VAT and CIT tax rates in every economy. The relevant tax rates are applied to potential revenue losses estimated in Section 3 of this Report.

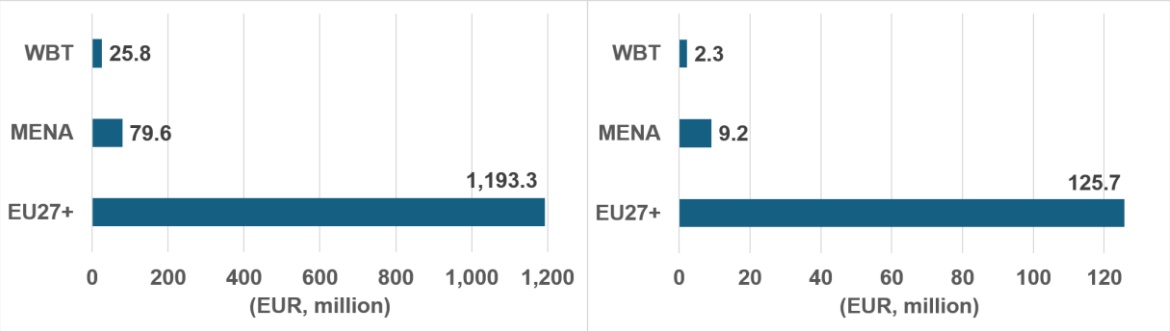
Main findings

The highest fiscal losses in absolute terms are observed in EU27+. Due to illicit IPTV supply and use, **European governments saw lost VAT estimated at EUR 1.2 billion in 2025. Potentially non-collected CIT is estimated at EUR 126 million in 2025**.

Fiscal losses are also significant in **MENA**. In 2025 illicit IPTV potentially **reduced VAT collection by almost EUR 80 million. CIT collection was potentially lowered by EUR 9.2 million**.

WBT region saw a potential fiscal loss in VAT of nearly EUR 26 million. Illicit IPTV also reduced public income by **EUR 2.3 million due to lost CIT** in 2025.

Figure 23. VAT AND CIT REVENUE LOSSES BY REGION (2025)



Combined estimated fiscal losses exceed EUR 1.3 billion in EU 27+, nears EUR 90 million in Northern African economies and EUR 30 million in Western Balkans and Türkiye.

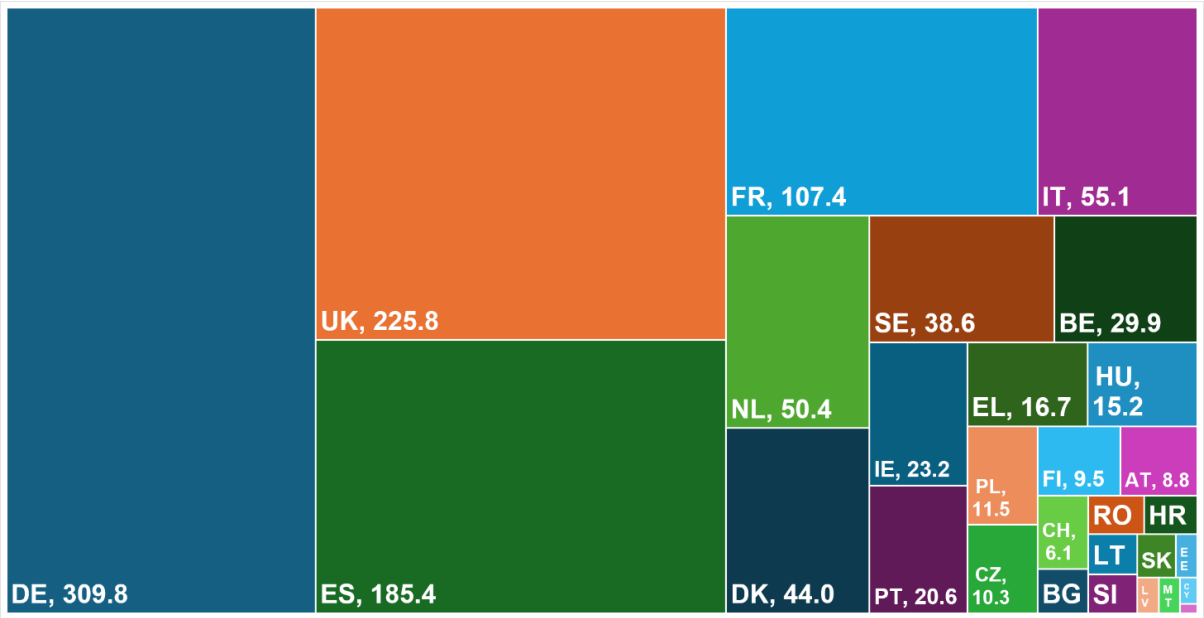
Table 17. VAT AND CIT REVENUE LOSSES BY COUNTRY IN EU27+ (2025)

Country	Country code	Annual VAT Losses (million EUR)	Annual CIT Losses (million EUR)
Total	**EU27+**	**1,193.28**	**125.67**
Austria	AT	8.81	0.85
Belgium	BE	29.94	2.98
Bulgaria	BG	3.71	0.15
Croatia	HR	3.39	0.20
Cyprus	CY	0.78	0.04
Czechia	CZ	10.29	0.86
Denmark	DK	43.95	3.23
Estonia	EE	1.53	0.12
Finland	FI	9.48	0.62
France	FR	107.37	11.56
Germany	DE	309.84	40.99
Greece	EL	16.71	1.28
Hungary	HU	15.23	0.42
Ireland	IE	23.19	1.05
Italy	IT	55.11	5.81
Latvia	LV	1.29	0.10
Lithuania	LT	3.23	0.22
Luxembourg	LU	0.27	0.18
Malta	MT	1.24	0.20
Netherlands	NL	50.40	5.17
Poland	PL	11.47	0.79
Portugal	PT	20.60	2.21
Romania	RO	3.56	0.23
Slovakia	SK	2.77	0.24
Slovenia	SI	3.12	0.26
Spain	ES	185.41	18.43
Sweden	SE	38.65	2.66
Switzerland	CH	6.14	1.24
United Kingdom	UK	225.79	23.57

Estimates for potential VAT and CIT revenue losses incurred by governments in EU27+ economies are presented in Table 17 above and Figure 24 below.

The largest fiscal impacts are concentrated in countries with large illicit IPTV user bases and high tax rates.

Figure 24. VAT REVENUE LOSSES BY COUNTRY IN EU27+ (2025)



Note: Estimates are provided in millions of euros.

Lost sales due to illicit IPTV result in VAT revenue losses worth nearly EUR 1.2 billion for European economies. Across Germany, the UK, and Spain VAT losses are estimated to accrue to EUR 721 million in 2025.

In Estonia, Latvia, Malta, Cyprus, and Luxembourg VAT revenue losses fall below EUR 2 million, however any loss in VAT causes a big impact on national budgets.

Table 18. VAT AND CIT REVENUE LOSSES BY COUNTRY IN WBT (2025)

Country	Country code	Annual VAT Losses (million EUR)	Annual CIT Losses (million EUR)
Total	**WBT**	**25.83**	**2.28**
Albania	AL	2.26	0.14
Bosnia and Herzegovina	BA	0.77	0.04
Montenegro	ME	0.46	0.02
North Macedonia	MK	1.19	0.06
Serbia	RS	4.44	0.28
Türkiye	TR	16.72	1.75

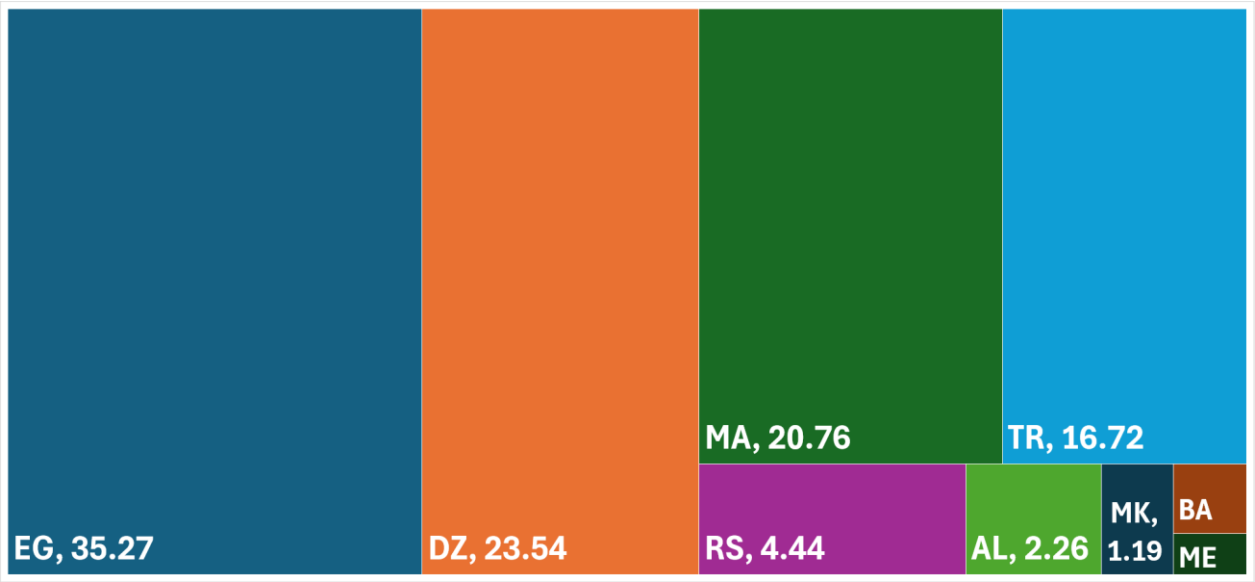
Estimates for potential VAT and CIT revenue losses incurred by governments in Western Balkans and Türkiye are presented in Table 18 above and Figure 25 below.

Table 19. VAT AND CIT REVENUE LOSSES BY COUNTRY IN MENA (2025)

Country	Country code	Annual VAT Losses (million EUR)	Annual CIT Losses (million EUR)
Total	**MENA**	**79.56**	**9.16**
Algeria	DZ	23.54	2.69
Egypt	EG	35.27	4.73
Morocco	MA	20.76	1.73

Estimates for potential VAT and CIT revenue losses incurred by governments in Algeria, Egypt, and Morocco are presented in Table 19 above and Figure 25 below.

Figure 25. VAT REVENUE LOSSES BY COUNTRY IN WBT AND MENA (2025)



Note: Estimates are provided in millions of euros.

Observing VAT revenue losses across the MENA and WBT regions illustrates the substantial and wide-ranging economic effects of illicit IPTV.

Illicit IPTV supply result in nearly EUR 80 million in VAT revenue losses across the studied MENA economies. The corresponding losses are estimated at almost EUR 17 million in Türkiye and EUR 9 million across the five Western Balkan economies.

SECTION 5. EMPLOYMENT EFFECTS

This section estimates employment effects caused by illicit IPTV. The assessment is carried out at a regional level for EU27, the UK, and Switzerland (EU27+), Western Balkans and Türkiye (WBT), and Algeria, Egypt, and Morocco (MENA). Additionally, country-level assessments are carried out.

Two types of employment effects are considered:

- Direct Employment; and
- Total Employment.

The methodology is described in the Annex A5. Direct employment effects are measured in sector 'Motion picture, video, television programme production; programming and broadcasting activities' – J59-J60 statistical classification of economic activities in the European Community (NACE Rev. 2). Total employment effects are estimated as a sum of direct and indirect employment effects. Employment effects are measured in number of persons. We also refer to employment effects as 'lost jobs' or 'lost employment' in this Report.

Main findings

Total effects on employment translate into **53'802 lost jobs in Europe (EU27+)** in 2025.

Total employment effects are estimated at **12'146 lost jobs in MENA** economies in 2025.

Total employment effects are assessed as **3'199 lost jobs in Western Balkans and Türkiye (WBT)** in 2025.

Figure 26. LOST EMPLOYMENT BY REGION (2025)

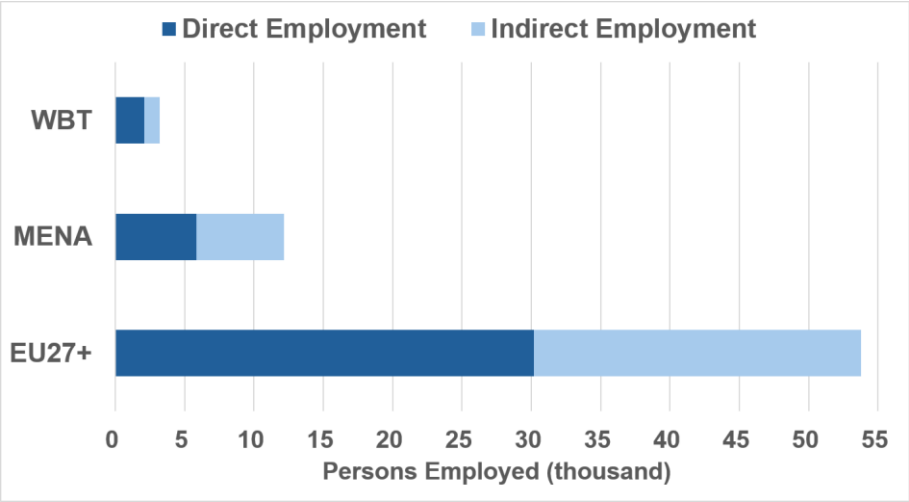


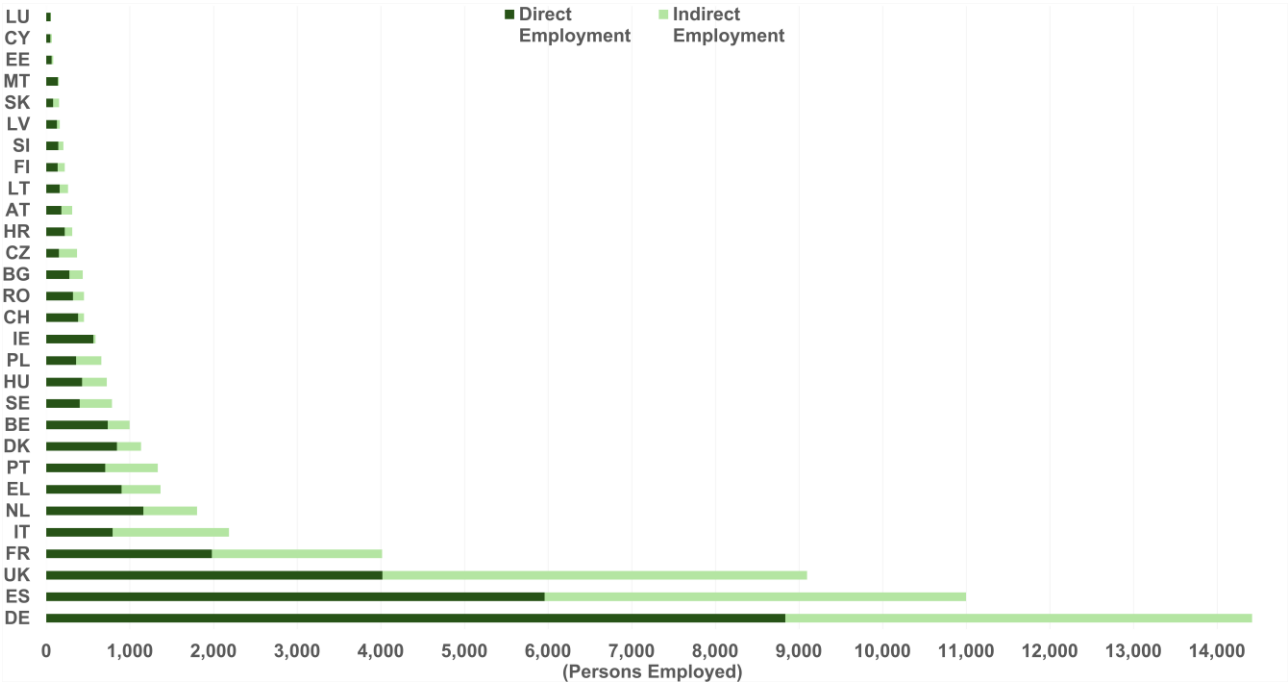
Table 20. EMPLOYMENT EFFECTS BY COUNTRY IN EU27+ (2025)

Country	Country code	Direct Employment (persons)	Total Employment (persons)
Total	**EU27+**	**30,181**	**53,802**
Austria	AT	181	310
Belgium	BE	736	996
Bulgaria	BG	277	437
Croatia	HR	221	311
Cyprus	CY	49	67
Czechia	CZ	151	368
Denmark	DK	846	1,134
Estonia	EE	65	84
Finland	FI	137	221
France	FR	1,981	4,017
Germany	DE	8,839	14,420
Greece	EL	901	1,367
Hungary	HU	429	724
Ireland	IE	564	589
Italy	IT	794	2,185
Latvia	LV	129	162
Lithuania	LT	160	261
Luxembourg	LU	51	57
Malta	MT	139	151
Netherlands	NL	1,162	1,803
Poland	PL	357	659
Portugal	PT	706	1,334
Romania	RO	320	451
Slovakia	SK	82	154
Slovenia	SI	144	205
Spain	ES	5,960	10,999
Sweden	SE	400	786
Switzerland	CH	381	452
United Kingdom	UK	4,020	9,098

Total effect on employment combines both direct and indirect effects of lost sales due to IPTV piracy. Reduced economic activity directly translates in jobs lost in the sector of motion picture, video, television programme production as well as programming and broadcasting activities. Indirectly, employment is affected in many other sectors in the economy which are supported by TV and broadcasting.

Employment effects reflect the structure of employment and volume of lost revenue (sales) in each economy. Table 20 and Figure 27 outline country-level employment effects in European Union Member States, the UK, and Switzerland.

Figure 27. EMPLOYMENT EFFECTS BY COUNTRY IN EU27+ (2025)



Germany is the country most affected when total effects in sales, tax collection, and employment are considered. In terms of direct effects, German TV and broadcasting sector is estimated to lose 8’838 jobs, while total employment effects in wider domestic economy translate into 14’420 lost jobs.

Spain and the UK are the next most affected economies in Europe, incurring significant losses in revenue, tax income and employment. Spanish economy is estimated to lose nearly 11 thousand jobs in total in 2025. The UK sees a loss of total 9’098 jobs due to illicit IPTV.

Significant employment effects are measured in France where direct effects are estimated at 1’981 lost jobs and total effects rise to 4’017 lost jobs.

Italy sees total employment effect of 2’185 lost jobs. Netherlands domestic market incurs total 1’803 lost employment.

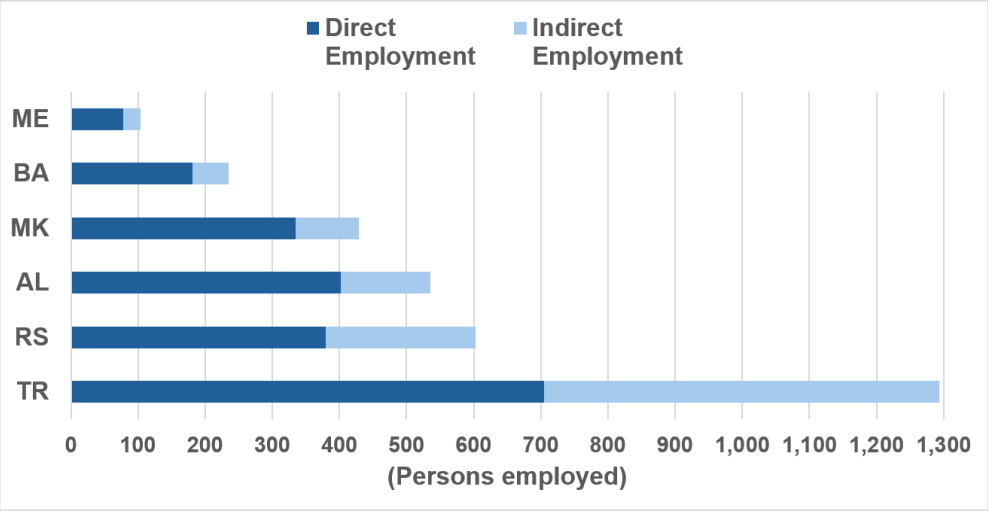
As estimated and discussed in Section 4 of this Report, reduced economic activity in the legitimate private sector affects government revenues through losses in VAT and corporate income tax (CIT) receipts. Employment losses in turn further reduce social security contributions to government budgets.

Table 21. EMPLOYMENT EFFECTS BY COUNTRY IN WBT (2025)

Country	Country code	Direct Employment (persons)	Total Employment (persons)
Total	**WBT**	**2,080**	**3,199**
Albania	AL	402	535
Bosnia and Herzegovina	BA	181	235
Montenegro	ME	78	104
North Macedonia	MK	335	428
Serbia	RS	380	603
Türkiye	TR	705	1,294

Table 21 and Figure 28 demonstrate country-level employment effects in Western Balkans and Türkiye.

Figure 28. EMPLOYMENT EFFECTS BY COUNTRY IN WBT (2025)



Illicit IPTV impacts Türkiye's economy significantly in terms of total effects on sales, fiscal effects, and employment. TV and broadcasting sector in Türkiye is estimated to lose 705 jobs in 2025. Its domestic market is estimated to suffer total employment losses of 1'294 jobs.

Employment effects are also notable in Serbia where total employment effects amount to 603 lost jobs in 2025, closely followed by Albania with total lost employment estimated at 535 jobs, and North Macedonia with total lost jobs assessed at 428.

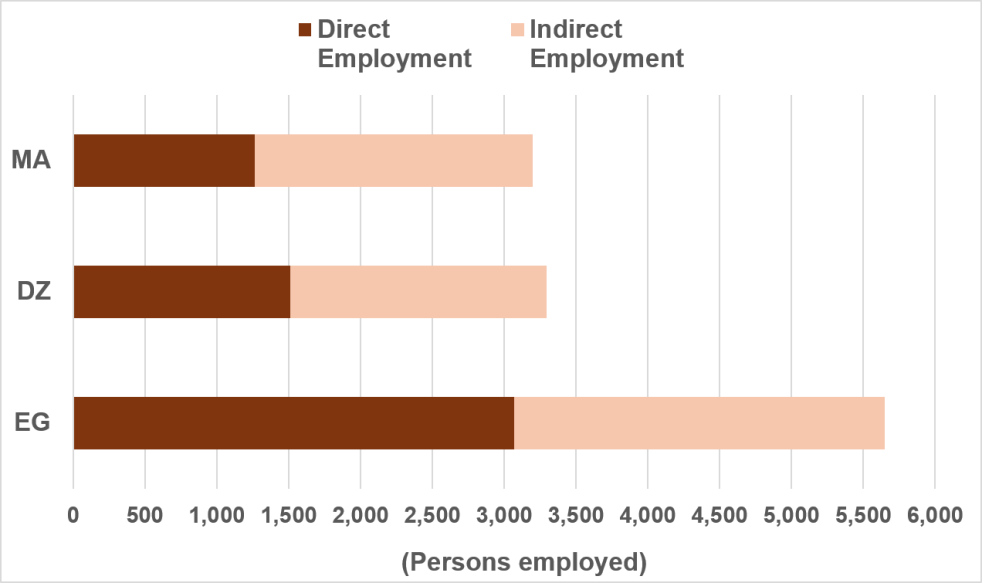
Bosnia and Herzegovina sees total lost employment of 235 jobs, and Montenegro is estimated to lose 104 jobs due to illicit IPTV in 2025.

Table 22. EMPLOYMENT EFFECTS BY COUNTRY IN MENA+ (2025)

Country	Country code	Direct Employment (persons)	Total Employment (persons)
Total	**MENA**	**5,846**	**12,146**
Algeria	DZ	1,510	3,298
Egypt	EG	3,071	5,652
Morocco	MA	1,265	3,197

Table 22 and Figure 29 show the country-level employment effects in Northern Africa. Illicit IPTV is estimated to result in 5'846 lost jobs in the TV and broadcasting sector across Algeria, Egypt and Morocco. Including indirect effects, total employment losses are estimated at 12'146 jobs.

Figure 29. EMPLOYMENT EFFECTS BY COUNTRY IN MENA (2025)



Indirect employment effects are notable in all three Northern African economies due to relatively high labour intensity of their domestic economies. The audiovisual sector purchases inputs from telecommunications, information technology, professional services, transport and other business services. Many of these supplying industries employ comparatively large numbers of workers relative to their output. Consequently, reduced demand from the AV sector can translate into substantial employment losses throughout domestic supply chains, considerably exceeding the direct losses within the sector itself.

Egypt is the most affected economy in MENA region in terms of lost sales, fiscal and employment effects. Illicit IPTV consumption in Egypt is estimated to result in 5'652 total lost jobs in 2025.

Total employment effects are measured at 3'298 lost jobs in Algeria, followed closely by Morocco with 3'197 total lost employment.

CONCLUSION

Estimates of the scope and economic impact of illicit IPTV point to the rising magnitude and ripple damaging effects both to the wider economy and to the television and broadcasting sector.

Continuously observed data in this Study for 2018, 2021, and 2025 allows recording the growth of the share of population accessing illicit IPTV and the illegal revenue generated by IP-infringing suppliers of IPTV. Both are on the rise. AV content is in high demand, which, coupled with the ease of access enabled by proliferation of broadband connectivity worldwide, facilitates the provision by illicit IPTV offerings.

Observing 2018-2025 data the following main conclusions are drawn:

- **Trend for the use of illicit IPTV is on the rise**. In the EU and the UK, number of users of illicit IPTV doubled compared with the number last recorded in 2021.
- **Illicit IPTV market remains lucrative for illegal providers**. Across the EU and the UK, illegal revenue is recorded at EUR 2.57 billion – this is 142% more that estimated in 2021 (EUR 1.06 billion).
- **Legitimate Pay-TV providers incur significant revenue losses.** Lost sales are estimated to accrue to a staggering EUR 5.3 billion – 84% more than recorded in 2021 (EUR 3.21 billion).

Two novel estimates are introduced in the Study: i) Fiscal effects and ii) Employment effects. Estimates include Switzerland in addition to the UK and 27 EU Member States. Furthermore, analysis is extended to include five Western Balkan countries – Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, and Serbia – together with Türkiye. Three Northern African economies are considered: Algeria, Egypt, and Morocco. Expanding geographical cover allows for more rigorous comparisons among economies and regions and provides insights into the markets relevant for governments and private entities operating in audiovisual sector.

The key estimates of present Study are summarised below.

Users of illicit IPTV

- 34.4 million persons are estimated to use unauthorised IPTV services[9] in the EU27, the UK and Switzerland (EU27+). This represents 8.9% of the total population[10] in this region.
- 11.4% of the population, representing 14.8 million persons, is estimated to use unauthorised IPTV in Algeria, Egypt and Morocco (MENA).
- 9.3% population – in total 7.1 million persons are estimated to use unauthorised IPTV across five Western Balkan economies – Albania, Bosnia and Herzegovina, Montenegro, North Macedonia, Serbia, and Türkiye (WBT).

Proportion of youth (aged 16-24) that accesses illicit IPTV is substantially higher than population average across three regions: 20.2% in EU27+, 22.9% in WBT, and 23.8% in MENA.

[9] I.e. Watch internet streamed TV (live or catch-up) from unauthorised online sources.
[10] Population aged 16-74.

Illicit IPTV Revenue

- Sales of copyright-infringing IPTV service subscriptions generated EUR 2.6 billion of unlawful revenue in EU27+ in 2025.
- EUR 313 million was generated in WBT – Western Balkans and Türkiye region in 2025.
- MENA economies (Algeria, Egypt and Morocco) accrued EUR 192 million unlawful revenue to illicit IPTV providers.

Revenue Losses incurred by legal Pay-TV providers

- Legal Pay-TV providers incurred potential losses in revenue of EUR 5.84 billion in EU27, the UK, and Switzerland (EU27+) due to pirated services in 2025.
- Potential revenue losses are estimated at EUR 480 million in MENA region in 2025.
- In Western Balkan economies and Türkiye (WBT) potential losses in revenue are estimated at EUR 130 million in 2025.

Fiscal Effects

- The highest fiscal losses in absolute terms are observed in EU27+. Due to illicit IPTV supply and use, European governments saw lost VAT estimated at EUR 1.2 billion in 2025. Potentially non-collected CIT is estimated at EUR 126 million in 2025.
- Fiscal losses are also significant in MENA. In 2025, illicit IPTV potentially reduced VAT collection by almost EUR 80 million. CIT collection was potentially lowered by EUR 9.2 million.
- WBT region saw a potential fiscal loss in VAT of nearly EUR 26 million. Illicit IPTV also reduced public income by EUR 2.3 million due to lost CIT in 2025.

Employment Effects

- Total effects on employment translate into 53’802 lost jobs in Europe (EU27+) in 2025.
- Total employment effects are estimated at 12’146 lost jobs in MENA economies in 2025.
- Total employment effects are assessed as 3’199 lost jobs in Western Balkans and Türkiye (WBT) in 2025.

ANNEX A – METHODOLOGY AND DATA

Annex A describes the methodology and data sources used to estimate the scale of illicit IPTV use in Europe. The Report assesses five key elements:

i. The number of users engaging in copyright-infringing IPTV consumption.

ii. The revenue generated by unauthorised IPTV subscription providers.

iii. The potential revenue losses incurred by legal Pay-TV service providers.

iv. The associated fiscal effects: VAT and CIT revenue losses.

v. The associated employment effects: direct and total employment.

A1 Illicit IPTV Users

The share of population that uses illicit IPTV is estimated based on equation number 1 as outlined below:

$$Share\ of\ population\ using\ illegal\ IPTV\ (N_{U-IPTV,i})\ =$$

$$Share\ of\ population\ watching\ Internet\ streamed\ TV\ \left(N_{IPTV,i}\right)$$
$$\times\ Share\ of\ population\ streaming\ content\ from\ illegal\ online\ sources\ (P_i) \qquad (Eq.1)$$

The results of the equation 1 estimates are outlined in section 1 of this Report. Variables considered in equation 1 are the following:

$N_{U\text{-}IPTV,i}$ – stands for the share of population using illicit IPTV in a particular economy. This is the result obtained combining two factors described below.

$N_{IPTV,i}$ – stands for the share of population watching Internet streamed television in a particular economy. This population comprises all users that stream IPTV paying for a legitimate subscription, from legal free online sources, or illicit online sources.

This data is collected from the EU survey on the use of Information and Communication Technologies (ICT) in households and by individuals. Published by Eurostat (last update: 17/04/2026). Data for Switzerland is published through the Swiss Federal Statistical Office (FSO). Data for MENA economies were collected from the ITU DataHub.

P_i – represents share of population that accesses or downloads or streams content from illicit online sources intentionally.

To estimate the share of users engaged in illicit IPTV streaming, the rate established by EUIPO Report *European Citizens and Intellectual Property: Perception, Awareness, and Behaviour* (2023) is applied[11]. To estimate the share of young (aged 16-24) users engaged in illicit IPTV

[11] The latest survey conducted in 2023 – an online survey, where the absence of an interviewer may have led to more respondents admitting to doing this than in the previous wave (when the interview was administered via telephone by interviewers). Other than this distinction, the questions asked are the same and survey results comparable across survey editions published in between 2013-2023.

streaming, the rate established by EUIPO Report *Intellectual Property and Youth Scoreboard* (2022) is applied. These rates differ in each economy.

For the UK, *Online copyright infringement tracker survey (13th Wave)* by UK IPO (2024) is used as data source for piracy index. For Switzerland, we applied EU27 average rate as reported by EUIPO (2022; 2023). For economies in Western Balkans, Türkiye, and countries in MENA region we applied piracy index of EU27+ economies (median of top quartile rate in this group).

Number of persons that use illicit IPTV is estimated based on equation number 2 as outlined below:

$$Population\ watching\ illegal\ IPTV\ (N_{P-IPTV,i}) =$$

$$Share\ of\ population\ using\ illegal\ IPTV\ \left(N_{U-IPTV,i}\right) \times Total\ Population\ (TP_i) \qquad (Eq.2)$$

The results of the equation 2 estimates are outlined in section 1 of this Report. Variables considered in equation 2 are the following:

$N_{P\text{-}IPTV,i}$ – stands for the number of persons (in the age-appropriate population group) who are using illicit IPTV in a particular economy. This is the result obtained combining two factors described below.

$N_{U\text{-}IPTV,i}$ – stands for the share of population (in the age-appropriate population group) using illicit IPTV in a particular economy. This is the result obtained in equation 1.

TP_i – represents total population (in the age-appropriate population group) in a particular economy.

Population data is provided by EUROPOP2019 – the latest Eurostat population projections, UK Office for National Statistics (ONS), Swiss Federal Statistical Office (FSO), and World Population Prospects 2024 by UN Department of Economic and Social Affairs, Population Division.

The factors described above allow for assessing the scope of illicit IPTV in each individual economy, as well as on the regional level. For illicit IPTV quantitative estimation, coherent and comparable indicators throughout all economies are applied.

A2 Illicit IPTV Revenue

The revenue that is generated by illicit IPTV service providers is estimated based on equation number 3 as outlined below:

$$Revenue\ generated\ by\ illegal\ IPTV\ providers\ \left(R_{IPTV,i}\right) =$$

$$\begin{aligned} &Population\ using\ illegal\ IPTV\ \left(N_{P-IPTV,i}\right) \\ &\quad \div\ Average\ Household\ size\ (H_i) \\ &\quad \times Share\ of\ population\ paying\ for\ illegal\ IPTV\ monthly\ subscription\ \left(S_g\right) \\ &\quad \times Average\ Monthly\ subscription\ Price\ (P_i) \qquad (Eq.3) \end{aligned}$$

The results of the equation 3 estimates are discussed in section 2 of this Report. Variables considered in equation 3 are the following:

$R_{IPTV,i}$ – stands for the revenue generated by illicit IPTV-subscription providers in a particular economy. This is the resulting indicator obtained combining the four factors described below.

$N_{P\text{-}IPTV,i}$ – stands for the population using illicit IPTV in a particular economy. These figures are computed based on equation 2 in this Report.

H_i – stands for the average number of adult equivalents in the household in each country. One paid subscription per household is considered to adjust paid subscription estimation per household instead of relying on the individual person level. This approach results in a more conservative illicit IPTV spending estimate.

Household data is provided by Eurostat Household Budget Survey (HBS), Swiss Federal Statistical Office (FSO), and Database on Household Size and Composition 2026 published by UN Population Division.

S_g – represents the share of population that is willing to pay for a monthly illicit IPTV subscription. This is the opposite to an option to stream IPTV for free, e.g., from websites that allow direct streaming for certain channels. This share is computed based on a web traffic in a sample of 1673 websites that are suspected of providing unauthorised IPTV services. Data is provided by AAPA members Canal+, Irdeto, and Lega Serie A – leading companies in Media, AV services, and digital software security and cybersecurity.

P_i – represents the average unauthorised IPTV monthly subscription price. The prices are deducted based on data collection for 1673 suspected-unauthorised IPTV providing websites[12].

The methodology described above allows assessing the scope of income accrued by unauthorised IPTV providers in each individual economy, as well as in regional markets.

Revenue generated by unauthorised IPTV-subscription providers is estimated based on several data sources. First, the base of users that access unauthorised IPTV is estimated according to equations 1 and 2. Average monthly subscription prices as well as the share of website traffic directed toward unauthorised IPTV subscription websites is estimated based on the original dataset built for the purpose of this Report.

Finally, the ratio between estimated revenue generated by illicit IPTV providers and number of individuals who use illicit IPTV is computed in each economy based on equation 4 as outlined below:

$$C_{IPTV,i} = \frac{R_{IPTV,i}}{N_{P-IPTV,i}} \ (Eq.4)$$

$C_{IPTV,i}$ – stands for the average cost to access illicit IPTV in a particular economy. This ratio is based on the amount of illicit revenue obtained in a particular economy ($R_{IPTV,i}$ – defined in equation 3) and number of individuals who are accessing illicit IPTV in this economy ($N_{P\text{-}IPTV,i}$ – defined in equation 2). Resulting estimates are presented in section 2 of this Report.

[12] Dataset is created by Gobelin House SLU and adapted based on representative sample on suspected unauthorised IPTV providers sourced by AAPA members Canal+, Irdeto, and Lega Serie A – leading companies in Media, AV services, and digital software security and cybersecurity

A3 Potential Revenue Losses Incurred by Legal Pay-TV Providers

The potential losses in revenue that is incurred by legal Pay-TV service providers is estimated based on equation number 5 as outlined below:

$$Potential\ losses\ in\ revenue\ incurred\ by\ legal\ PayTV\ providers\ (RL_{IPTV,i}) =$$

$$Population\ watching\ unauthorized\ IPTV\ (N_{P-IPTV,i})$$
$$\div\ Average\ Household\ size\ (H_i)$$
$$\times Share\ of\ population\ paying\ for\ unauthorized\ IPTV\ monthly\ subscription\ (S_g)$$
$$\times Average\ Legal\ Monthly\ subscription\ Price\ (LP_i) \qquad (Eq.5)$$

The results of the equation 5 estimates are discussed in section 3 of this Report. Variables considered in equation 5 are the following:

$RL_{IPTV,i}$ – stands for the potential losses in revenue incurred by legal Pay-TV providers in a particular economy. This is the resulting indicator obtained combining the four factors described below.

$N_{P\text{-}IPTV,i}$ – stands for the population using illicit IPTV in a particular country. These figures are computed based on equation 2 in this Report.

H_i – stands for the average number of adult equivalents in the household in each country. One paid subscription per household is considered to adjust paid subscription estimation per household instead of relying on the individual person level. This approach results in a more conservative illicit IPTV spending estimate.

Household data is provided by Eurostat Household Budget Survey (HBS), Swiss Federal Statistical Office (FSO), and Database on Household Size and Composition 2026 published by UN Population Division.

S_g – represents the share of population that is willing to pay for a monthly illicit IPTV subscription. This is the opposite to an option to stream IPTV for free, e.g., from websites that allow direct streaming for certain channels. This share is computed based on a web traffic in a sample of 1673 websites that are suspected of providing unauthorised IPTV services. Data is provided by AAPA members Canal+, Irdeto, and Lega Serie A – leading companies in Media, AV services, and digital software security and cybersecurity.

LP_i – represents the average legal Pay-TV monthly subscription price. The prices are deducted based on Yearbook Edition 2025 published by European Audiovisual Observatory.

A4 Fiscal Effects: VAT and CIT

The potential fiscal losses are incurred by governments. We estimate the potential loss in the Value Added Tax (VAT) based on equation number 6 as outlined below:

$$Potential\ fiscal\ loss\ (FL_{VAT,i}) =$$

$$Potential\ losses\ in\ revenue\ incurred\ by\ legal\ PayTV\ providers\ (RL_{IPTV,i})$$
$$\times Tax\ rate\ (T_i) \qquad (Eq.6)$$

$FL_{VAT,i}$ – stands for the potential VAT fiscal losses in a particular economy. This is the resulting indicator obtained combining the two factors described below.

$RL_{IPTV,i}$ – stands for the potential losses in revenue incurred by legal Pay-TV providers in a particular economy. This is the result obtained in equation 5.

T_i – stands for the tax rate (VAT) in a particular economy.

Data for the VAT rates is collected from Tax Foundation Europe (taxfoundation.org) and Worldwide Tax Summaries by local PwC tax specialists (taxsummaries.pwc.com).

We estimate the potential loss in Corporate Income Tax (CIT) based on equation number 7 as outlined below:

$$Potential\ fiscal\ loss\ (FL_{CIT,i}) = Potential\ losses\ in\ revenue\ incurred\ by\ legal\ PayTV\ providers\ (RL_{IPTV,i}) \times EBIT\ margin\ (E_g) \times Tax\ rate\ (T_i) \qquad (Eq.7)$$

$FL_{VAT,i}$ – stands for the potential CIT fiscal losses in a particular economy. This is the resulting indicator obtained combining the two factors described below.

$RL_{IPTV,i}$ – stands for the potential losses in revenue incurred by legal Pay-TV providers in a particular economy. This is the result obtained in equation 5.

E_g – stands for EBIT margin estimated for the Audiovisual industry. The average EBIT margin is estimated based on 115 corporations in the audiovisual industry and their EBIT data during the latest available 10 years. Financial information is collected through UK FAME dataset. EBIT margin is estimated at conservative average 8.35%.

T_i – stands for the tax rate (CIT) in a particular economy.

Data for the CIT rates is collected from Tax Foundation Europe (taxfoundation.org) and Worldwide Tax Summaries by local PwC tax specialists (taxsummaries.pwc.com).

A5 Employment Effects: Direct and Total

The direct employment effect caused by illicit IPTV is estimated based on the equation number 8 as outlined below:

$$Direct\ employment\ (ED_{IPTV,i}) = Potential\ losses\ in\ revenue\ incurred\ by\ legal\ PayTV\ providers\ (RL_{IPTV,i}) \times FTE\ multiplicator\ J59-60\ (FTE_i) \qquad (Eq.8)$$

where:

- $ED_{IPTV,i}$= direct employment effect in economy i;
- $RL_{IPTV,i}$= potential revenue loss incurred by legal pay-TV providers in economy i;

- FTE_i= full-time-equivalent employment multiplier for economy i. This is estimated as productivity – i.e. how many FTE is required to generate EUR 1 million output in NACE Rev. 2 sector J59-60

Direct employment effect is measured in sector 'Motion picture, video, television programme production; programming and broadcasting activities' – J59-J60 statistical classification of economic activities in the European Community (NACE Rev. 2).

Data is collected from Eurostat National Accounts, UK Office for National Statistics (ONS) - Employment multipliers and effects in the UK dataset (2023), and Swiss Federal Statistical Office (FSO) - National Accounts.

For Egypt data was collected from Central Agency for Public Mobilization and Statistics (CAPMAS) – National Accounts. For Morocco - Haut-Commissariat au Plan (HCP) – National Accounts. For Algeria - Office National des Statistiques (ONS) – National Accounts, Input-Output Tables (Tableaux des Entrées-Sorties).

Indirect employment effect is estimated based on the equation number 9 as outlined below:

$$Indirect\ employment\ (EI_{IPTV,i}) =$$

$$Potential\ losses\ in\ revenue\ incurred\ by\ legal\ PayTV\ providers\ (RL_{IPTV,i}) \times indirect\ FTE\ multiplicator\ (IFTE_i) \qquad (Eq.9)$$

where:

- $EI_{\text{IPTV},i}$= indirect employment effect in economy i;
- $RL_{\text{IPTV},i}$= potential revenue loss incurred by legal pay-TV providers in economy i;
- $IFTE_i$= full-time-equivalent indirect employment multiplier for economy i. It is estimated based on equation 10.

$$IFTE_i = FTE\ multiplicator\ total\ (FTE_i) \times (FTE\ Leontief\ multiplier\ (LM_i) - 1) \qquad (Eq.10)$$

where:

- FTE_i= full-time-equivalent employment multiplier for economy i. This is estimated as productivity – i.e. how many FTE is required to generate EUR 1 million output in total domestic market.
- $FTE\ Leontief\ multiplier\ (LM_i)$ = total domestic Leontief output multiplier for OECD sector J58-60.
- subtracting 1 removes the initial direct output effect.

Total employment effect is estimated based on the equation number 11 as outlined below:

$$Total\ employment\ (ET_{IPTV,i}) =$$

$$Direct\ employment\ (ED_{IPTV,i}) + Indirect\ employment\ (EI_{IPTV,i}) \qquad (Eq.11)$$

Data for Leontief inverse (domestic) was collected from The OECD harmonised national Input-Output tables (2025 release). OECD database allows for comparable and harmonized estimates across all studied economies.

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