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EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

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# Television and on-demand audiovisual services in Europe

# Télévision et services audio-visuels à la demande en Europe

# *Fernsehen und audiovisuelle Abrufdienste in Europa*

2011

PDF VERSION

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# Main 'convergent players' in Europe 2010-2011

| Rank | Company | Country | Global operating revenues 2010 (in million EUR) / Growth 2010/09 | Fixed telephony services | Mobile telephony | Internet Service Provision | Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV) |
|---|---|---|---|---|---|---|---|
| 1 | Samsung Electronics | **KR** | 10 907 (+26.1%) | | Manufacturer | | |
| 2 | Deutsche Telekom | **DE** | 63 919 (-3.3%) | T-Com (DE, HR, HU, SK), T-Systems (CZ), Makedonski Telecom (MK), Hellenic Telecom (OTE) (40%) | T-Mobile (DE, AT, GB, HR, MK, NL, SK, US), T-Systems (CZ), Polska Telefonia Cyfrowa (PL), Cosmote (RO), Hellenic Telecom (OTE) (40%) | T-Online (DE, AT, HU), T-Systems (CZ), HT (HR), Makedonski Telcom (MK), Hellenic Telecom (OTE) (40%) | T-Entertain (IPTV; DE), Entertain-Sat TV (Sat, DE); T-Home (CATV & IPTV ;HU, SK), ViaHome (IPTV; CZ), Max TV (IPTV, HR, MK), Sat-TV (Sat ; HU), OTE TV (Sat ; GR, 40%), T-Mobile (DTT, NL) |
| 3 | Sony | **JP** | 61 366 (+6.4%) | | Sony Ericsson (manufacturer) (100% since October 2011) | | Sony Internet TV |
| 4 | Telefonica | **ES** | 60 737 (+7.1%) | Telefonica (ES), O2 (GB, IE, DE, CZ, SK), Hansenet (DE) | Movistar (ES), O2 Mobil (CZ, SK, GB, IE, DE), Movistar One (South America), Vivo (BR) | Telefonica (ES), O2 (CZ, DE), UPC Ceska Rep. (8), Hansenet (DE), Terra Netowrks (ES, US, South America) | Imagenio (IPTV ; ES), O2 TV (IPTV ;DE, CZ), DTS (sat ; ES ; 22%) ; ZON Multiledia (sat/cab, PT, 5.4%) collaboration with Multichoice (Africa) |
| 5 | Panasonic | **JP** | 58 994 (-0.8%) | | Manufacturer | | |
| 6 | Toshiba | **JP** | 58 712 (-1.1%) | | | | |
| 7 | Vodafone Group PLC | **GB** | 57 684 (+4%) | OF Fjarskipti (IS) | Vodafone (AT, DE, GB, GR, HU, IE, IT), OF Fjarskipti (IS), | OF Fjarskipti (IS) | OF Fjarskipti (IPTV, IS), Internet TV (ES), Casa TV (PT) |
| 8 | Microsoft Inc. | **US** | 48 602 (-5%) | | | | Windows Media center |
| 9 | Apple Inc. | **US** | 47 918 (+64.5%) | | Manufacturer. Alliances with major European operators for the commercialisation of iPhone and iPad, application store | | |
| 10 | Groupe France Télécom | **FR** | 46 076 (+1.5%) | Orange ( CH, FR, ES, PL) | Orange (AT, CH, ES, FR, GB, LU, PL, RO), Mobistar (BE) | Orange (CH, FR, ES, PL, SK) | Orange TV (IPTV) (CH, ES) La TV d'Orange (FR), Videostrada TV (PL), Fiber TV (SK) Sat-TV La TV Orange (FR) |
| 11 | Nokia | **FI** | 44 446 (+3.6%) | | Manufacturer | | |
| 12 | LG Electronics | **KR** | 37 105 (+11.7%) | | Manufacturer | | |

| Audiovisual services distribution to mobile phones or game consoles | App Stores / Connected TV Stores | Social networks / Videosharing platforms | TV and NVoD services | On-demand audiovisual services | Production and distribution of films and TV programmes | Other main assets / activities |
|---|---|---|---|---|---|---|
| | Smart TV Store | Galaxy S | | 3D VoD services (US, AU, SG, ES,...) ; agreements with Acetrax | | EGP manufactuer, Visual display, IT Solutions, Semiconducteurs |
| T-Mobile (DE, NL, GB, HU, CZ, AT), Polska Telefonia Cyfrowa (PL) | | | Entertain Infokanal (DE), Magio Infokanal (SK), Conn-x TV Sport (GR, 40%), Max-TV (HR), Ozone TV (HU) | T-Entertain, Videoload (DE), T-Home TV (HU), Videoteka (HU), VOD (SK), Videoteka (MK) | | Agreements with Apple, AndroidMarket, NokiaStore |
| Sony Entertainment Network | Sony Internet TV (integrating Google TV) | Play Community | 58 channels in Europe (AXN, AXN Sci-fi, AXN Crime, Animax, MGM Channel, SET) | playStation Store (JP, US, GB, FR, DE,…), Sony Entertainment Network (VoD for mobile phone), Crackle (Worldwide free VoD streaming service), Co-owner of VEVO | Sony Pictures, distribution of film and Tv programmes (theatrical, TV, home video, VoD) | Production of EGP products, Digital cinema integrator |
| Mobistar (ES), O2 TV (IE), collaboration with Microsoft XBoX360 (ES) | | Tuenti | 21% Sogecable; O2 Info (CZ), Blueroom (IE) | Imagenio Videoclub, Pixbox (ES), O2 Videotéka (CZ), Terra TV | Grupo Telefonica de contenidos | O2 Music Download service (in association with MTV) |
| | Viera Connect Apps | Social Networking TV | | Agreement with Acetrax | | Consumers Products, Business products and industrial solutions |
| | Toshiba AppsConnect | | | | | EGP and satellite dish manufacture |
| Mobile TV (HU, PT, RO, TR) Vodafone TV (ES, GR, NL,GB), Vodafone Live (RO), Vodafone Sky TV (IT), Vodafone Digital+ (IS) | | Vodafone 555 Blue (in collaboration with Facebook) | Chilli TV (HU, PT), Blue TV (HU) | Videoclube PT | | |
| TV on XboX 360 (20 countries, including US, CA, GB, ES, DE, IT, FR) | | So.cl | | Zune Marketplace (AT, BE, CH, DE, DK, ES, FR, FI, GB, IE, IT, NL, NO, SE), MSN Movies (AT, DE, CH), MSN Video | | IT software publishing (including Microsoft TV), video games, MSN portals, search tool Bing (including Bing Video) |
| | iTunes Stores (including Apps providing access to live TV channels) | Ping | | iTunes Store (film and TV VoD service in US, CA, AU, NZ, MX, CH, DE, ES, FR, GB, IT) | Steve Jobs (Apple's CEO) was the main shareholder of The Walt Disney Company (6%) | Hardware and software; online distribution of third-party content (iTunes), iphone, ipod, Apple TV box. |
| TV Max/ TV d'Orange (FR), Live TV (CH, RO), Orange TV Movil (ES), Mobistar Mobile TV (BE), Strefy TV (PL), collaboration with Microsoft XBoX360 | | Dailymotion, Plazza | France : 16 channels, ES : 3, PL : 3, BE: 1 ; partnership with Canal+ | Orange 24/24 (FR), Dailymotion 3D (FR) | Studio 37 (film production, FR) | GlobeCast (teleport), Agreement with Apple |
| | OVI Store | Nokia Puls application | | OVI Store | | OVI Music |
| | LG Smart TV Home Dashboard | | | Agreements with Acetrax, Viaplay, SF ANytime | | EGP manufactuer, Electrodmestics |

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# Main 'convergent players' in Europe (Continued)
## 2010-2011

| Rank | Company | Country | Global operating revenues 2010 (in million EUR) / Growth 2010/09 | Fixed telephony services | Mobile telephony | Internet Service Provision | Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV) |
|---|---|---|---|---|---|---|---|
| 13 | Bouygues | **FR** | 32 356 (0%) | Bbox (Fr) | Bouygues Telecom (FR) | Bbox (FR) | Bbox (IPTV, FR) |
| 14 | Hutchinson Whampoa Ltd | **HK** | 31 567 (-18.1%) | | 3 (GB, AT, DK, IE, IT, SE…) | | |
| 15 | Vivendi | **FR** | 28 878 (+5.6%) | SFR (FR), Maroc Telecom (MA) | SFR (FR), Maroc Telecom (MA) | SFR (FR), Maroc Telecom (MA) | DTH: Canalsat, Canalsat Suisse, TNT Sat ; DTT: Canal+/ Canalsat 3 étoiles, Media Overseas (DTH), Neuf de SFR (IPTV) ; TVMTBox (IPTV ; MA) |
| 16 | Comcast | **US** | 26 825 (+8.7%) | | Xfinity Voice (US) | Xfinity Internet (US) | Xfinity TV (Cable ; US) |
| 17 | Telecom Italia | **IT** | 28 373 (+0.1%) | Alice (IT), Hansenet (DE) | TIM (IT) | Alice ADSL (IT), Hansenet (DE), BBned (NL) | Cubovision (IT), DTT package (3) |
| 18 | Walt Disney Inc. | **US** | 27 287 (+11.7%) | | | | |
| 19 | Amazon Inc. | **US** | 24 299 (+42.1%) | | | | |
| 20 | News Corporation | **US** | 23 213 (-13.5%) | | Telephony services by BSkyB (GB) and Sky Italia (IT) | Sky Broadband (GB) | Sky Digital (DTH, GB, IE); Freesat (DTH, GB);Sky Italia (DTH, IT); Sky Deutschland (DTH, AT, DE) Direct TV (DTH,US); Foxtel (DTH, AU); Tata Sky (Asia), STAR (Asia), |
| 21 | BT Group PLC | **GB** | 23 162 (-3%) | BT Together | BT Mobile | BT Broadband | BT Vision (IPTV) |
| 22 | Google Inc. | **US** | 22 124 (+34.1%) | | Smartphone Nexus | | YouTube Live, Google TV |
| 23 | Sistema | **RU** | 20 756 (+58.7%) | Comstar UTS | MTS | Comstar | MTS (Cable ; RU) ; Multiregion (Cable ; RU); TVT (Cable ; RU) Stream TV Service (IPTV; RU) |

| Audiovisual services distribution to mobile phones or game consoles | App Stores / Connected TV Stores | Social networks / Videosharing platforms | TV and NVoD services | On-demand audiovisual services | Production and distribution of films and TV programmes | Other main assets / activities |
|---|---|---|---|---|---|---|
| 3G TV/ Canal+ Mobile/ CanalSat Mobile | | Wat.tv | EUR : Eurosport (3 services) ; FR : TF1 (43%), LCI, TV Breizh, Histoire, TF6, TFOU, Ushuaia TV, Jet, Acquisition TMC and NT1 in 2009 | TF1 Vision (MyTF1VoD, catch-up TV, Facebook) | TF1 Films production; TF1 Productions, TF1 Droits audiovisuels, TF1 Publicité production | Construction industry; TF1 Video; partnership with Apple, Metro France (free daily) |
| 3 Mobile TV (AT, DK, IE, SE), Add TV (GB), La3 TV (IT) | | | AT : 3Live, Urban TV ; IT : LA 3, LA3Cinema. | On-demand services for mobile (AT, GB, DK, IE, IT, SE) | | Hutchison 3G (Music). |
| Pass TV Mobile/ Pass Canalsat Mobile/ Pass Canal+ Mobile | | Starbright World | Groupe Canal+ and thematic channels (FR) (55 channels, including NVoD services Cine+), Canal+ Cyfrowy (PL: 14 channels) ; i>Tele, Planete (IT), 16% Sogecable (ES). | Canalplay (FR), Canal+ à la demande (FR), Canalsat à la demande (FR) Cineplay (FR), NeufVoD (FR), Co-owner of VEVO | Studiocanal, Nulle part ailleurs | Universal Music, Videogames : Activision Blizzard (57%); Stake in NBC Universal (20%) sold to General Electrics in January 2011 |
| | | Tunerfish | NBC channels and PPV events (US) ; 102 TV channels in Europe (CNBC Europe, Hallmark, KidsCo, SciFi, Universal..) | Xfinity TV (US) ; Providing programmes to main VoD operators, Co-owner of Hulu (US) | NBC Universal Studio, distribution of TV programmes | |
| | | Yalp, Virgilio Community | La7 (2 channels), MTV Italia (4 channels). | Cubovision web TV (IT), MTV Music (IT), Cubovision su Facebook (IT) | | APCOM (News Agency), Telecom Italia Broadcasting (analogue and digital networks), Virgilio (portail Internet). |
| | | Togetherville | 91 channels in Europe (Disney Channel, Disney Junior, XD, Toon Disney, ESPN, ABC,…). | Providing programmes to main VoD operators. Various catch-up TV services. Co-owner of Hulu (US) | Walt Disney, Pixar, Distribution of film and TV programmes (theatrical, TV, home video, VoD), | Publishing activities. leisure parks |
| | | Public Notes on Kindle | | AmazonVod (US), Lovefilm (GB, DE, DK, SE, NO) | | Retail online ; Kindle; Whyspersinc (Kindle store) |
| Sky Mobile TV (IT, GB) | | Myspace (sold in 2011) | 328 channels in Europe : GB: BSkyB (55 channels; and NVoD services Sky Vox Office, Premplus), DE: Sky Deutschland (23 and NovoD Sky Select) , IT: Sky Italia (53) and Fox International (49), AT (2), BG (3), ES (3), FR (1), LV (2), RO (1), TR (3), PT (6), PL (4) ; US and AU: TV channels + cable networks, International: NGC (52%). | Sky Anytime (GB), SkyPlayer (GB) | 20th Century Fox | Publishing. |
| | | Announcing "Social TV" | | Vision TV | | |
| | Nexus Apps Store ; Google TV | YouTube, Google+ | | YouTube | | Search Tool; Google Video; Android Operatin system,… |
| MTS Mobile TV | | | | Povtor TV (RU), Stream VoD (RU) | TV Programming and movies | Advertising (Maxima advertising agency, TV-Project), print distribution (Nasha Pressa), newspaper publishing (Literaturnaya Gazeta, |

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# Main 'convergent players' in Europe (Continued)
## 2010-2011

| Rank | Company | Country | Global operating revenues 2010 (in million EUR) / Growth 2010/09 | Fixed telephony services | Mobile telephony | Internet Service Provision | Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV) |
|---|---|---|---|---|---|---|---|
| 23 | Sistema (Continued) | | | | | | |
| 24 | Time-Warner Inc. | **US** | 20 288 (+12.8%) | | | | |
| 25 | Bertelsmann AG | **DE** | 16 447 (+4.6%) | | | | |
| 26 | Vimpelcom | **BM** | 16 649 (+170%) | Beeline (RU), Kyivstar (UA), Infostrada (IT) | Beeline (RU), Kyivstar (UA), Wind (IT), Djezzy (DZ), Mobilink (PK), Banglalink (BD), Telecel (CF), LeoTM (BI) | Beeline (RU), Kyivstar (UA), Infostrada (IT), Djezzy (DZ) | Beeline (IPTV, RU), Kyivstar (IPTV, UA); Infostrada (IPTV, IT) |
| *p.m.* | Wind Telecom-municazioni S.p.A. | **IT** | 5 491 (2009) | Infostrada | Wind (IT) | Infostrada (IT) | Infostrada (IPTV, IT) |
| 27 | Acer | **TW** | 16 145 (+30%) | | | | |
| 28 | Lenovo | **HK** | 15 320 (+24.2%) | | | | |
| 29 | KPN | **NL** | 13 398 (-0.4%) | KPN (NL) | KPN Mobiel (NL), e-plus (DE) | Internet van KPN (NL) | NL : Interactieve TV (IPTV), Digitenne (DTT) |
| 30 | Teliasonera AB | **SE** | 12 991 (+12.6%) | Telia (SE), Sonera (FI), Lattelecom (LV), TEO (LT), Telia Stofa (DK) | Telia MobilT (SE), Halebop (SE), Netcom (NO), Telia (DK), EMT (EE), LMT (LV), Omnitel (LT), Megafon (RU), Azercell (AZ), Geocell (GE), Kcell (KZ); Moldcell (MD), Yoygo (ES),… | Telia Bredband (SE), Sonera (FI), Nexgentel (NO), Telia Stofa (DK), Elion (EE), Lattelecom (LV), TEO (LT), Yoygo (ES), Geocell (GE) | IPTV: Telia TV (DK, SE), Next TV (NO), Elion TV (EE), Gala TV (LT), Interaktiva TV (LV), Koti TV (FI). DTT: Gala Digital (LT). CATV: Stofa (DK), Sonera (FI) |
| 31 | Telenor ASA | **NO** | 12 112 (+3.3%) | Telenor (NO) | Telenor (12 countries) | Online (NO) | Canal Digital CATV, DTH (DK, FI, NO, SE), IPTV: Bredbans, Digital-TV (SE), DTT: Riks TV (NO) |
| 32 | Viacom | **US** | 10 968 (on 9 months) | | | | |
| 33 | Swisscom AG | **CH** | 9 791 (+17%) | Swisscom (CH), Fastweb (IT) | Swisscom Mobile (CH), Fastweb (IT) | Swisscom Flixnet (CH), Fastweb (IT) | Swisscom TV (IPTV, CH), Fastweb (IPTV, IT). |

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| Audiovisual services distribution to mobile phones or game consoles | App Stores / Connected TV Stores | Social networks / Videosharing platforms | TV and NVoD services | On-demand audiovisual services | Production and distribution of films and TV programmes | Other main assets / activities |
|---|---|---|---|---|---|---|
| | | | | | | Metro, Rossiya), and multimedia (Sistema Multimedia), consumer electronics, banking, retailing, real estate,… |
| | | Flixter | >148 channels in Europe (Boomerang, Cartoon Network, Cinemax, CNN, TCM, HBO,…). | Providing programmes to main VoD operators. Warner Collection (US, FR), HBO On Demand | Warner Bros., Distribution of film and TV programmes (theatrical, TV, home video, VoD), Publishing activities. | |
| Apps for smartphones | | Clipfish | RTL Group: 52 TV channels and 31 radio stations in 11 countries. | Various VoD and catch-up TV channels operated by the RTL Group companies | FremantleMedia, FremantleMedia North America (USA), Talkback Thames (GB), UFA Film & TV Produktion (DE), Grundy Television (AU), CLT-UFA International (LU), M6 Films (FR) | Arvato (AV facilities), publishing, Direct Group (retail). |
| Beeline Videoportal (RU), Kyivstar (UA), Beeline Mobile TV (RU), Djuice (UA) | | | | Beeline Videoprokat (RU), Infostrada TV (IT) | | |
| | | | | | | |
| | Alive Store (launch in UK, sept. 2011) | | | Agreement with Acetrax | | PC and tablets manufacturer |
| | Lenovo Marketplace | | | Agreement with Acetrax | | PC and tablets manufacturer |
| Mobiel TV (NL) | | | Interaktive TV (NL) | Agreement with Videoland | | |
| Mobile TV (EE), Omnitel Mobili TV (LT), Mobila TV (LV, SE) Netcom (NO), (SE) | | | Telia Nöjeskanalen (SE), Zaptor TV (DK) | Telia Nöje Video on Demand (NO), Telia Videobutik (SE), Stofanetbio (DK), Stofa Digital Filmpakker (DK), Elion VoD (EE) | | Musiikkilataamo (FI). |
| Telenor Mobil TV (DK, NO), Beeline (RU) | | | Co-owner of C:More (59 channels in Nordic countries : Canal+, Canal9); NOvoD service Kioskfilm | C:More VoD services | | Terrestrial transmission (Norkring, NO, BE), satellite operator (Telenor Satellite Broadcasting) ; agreement with Google for Android Market ecosystem ; 31% of Vimpelcom Ltd shares |
| | | Artist.MTV | 120 channels in Europe (MTV, Nickelodeon, Comedy, Viva, Paramount,…) | Providing programmes to main VoD operators. Own VoD service in US | Paramount Pictures, sales of TV programmes, home video distribution | |
| Swisscom TV Air (CH) | | | | Teleclub on demand (CH), Fastweb (IT) | CT Cinetrade | TV Replay (Music), Swisscom Broadcast (terrestrial transmission), Billag (licence fee collection in CH) |

T.2.1

## Main 'convergent players' in Europe (Continued)
## 2010-2011

| Rank | Company | Country | Global operating revenues 2010 (in million EUR) / Growth 2010/09 | Fixed telephony services | Mobile telephony | Internet Service Provision | Audiovisual services distribution (cable, satellite, IPTV, DTT, connected TV) |
|---|---|---|---|---|---|---|---|
| 34 | Nintendo | **JP** | 8 682 (-39.3%) | | | | |
| 35 | Belgacom | **BE** | 7039 (+16.1%) | Belgacom | Proximus | Belgacom | Belgacom TV (IPTV, BE), Belgacom TV Partout (Multiplatform) Scarlet TV (IPTV, BE). |
| 36 | Liberty Global Inc. | **US** | 6 804 (+30.1%) | UPC Broadband (AT, CZ, HU, IE, NL, NO, PL, SI, SK), Telenet (BE), Cablecom (CH) | | UPC Broadband (AT, CZ, HU, IE, NL, NO, PL, SI, SK), Telenet (BE), Cablecom (CH) | CATV (AT, CH, CZ, BE, DE, HU, IE, NL, NO, PL, RO, SK), and DTH satellite (CZ, HU, RO, SK) |
| 37 | ARD | **DE** | 6 262 (+1.6%) | | | | |
| 38 | Fininvest | **IT** | 6 214 | | | | Mediaset Premium (DTT), Tivusat (DTH) |
| 39 | BBC Group | **GB** | 5 655 (+5%) | | | | Freesat (DTH, GB, IE) |
| 40 | Hellenic Telecommunications Organisation S.A. | **GR** | 5 519 (-7.8%) | HTO | HTO | HTO | IPTV: Conn-x TV (GR), Dolce Interativ (RO). |

| Audiovisual services distribution to mobile phones or game consoles | App Stores / Connected TV Stores | Social networks / Videosharing platforms | TV and NVoD services | On-demand audiovisual services | Production and distribution of films and TV programmes | Other main assets / activities |
|---|---|---|---|---|---|---|
| | | announced | | Minna-no heater Wii (JP) (closed 30.4.2011) | | Video games |
| Belgacom Mobile (Proximus) | | | Skynet iMotion Activities (11 channels) | Belgacom TV à la demande (2 linguistic versions). | Involvment in film co-production | |
| | | | >170 channels in Europe. Telenet (13 channels), Chello Central Europe (6), Ceska Programmova (2), Chello Media Programming (24), Jimjam (14), MGM Channel (6), Multicanal Iberia (9), QVC (2), QVC Deutschland (1), Sport1 (6), Telenet (13), TV Paprika (3), UPC Ceska Rep. (8), Zonemedia Broadcasting (41) | UPC On demand (AT, NL), Telenet à la carte (BE), Kino auf Abruf (DE) | | |
| | | | 20 TV channels (Eins, regional channels, thematic channels, various versions of Deutsche Welle), radio stations | ARD-Mediathek, Channels on YouTube, Hbbtv | Bavaria, Studio Hamburg, distribution of TV programmes | |
| | | | 39% of Mediaset (RTI: 33 channels, 50,13% of Telecinco :8), Mediolanum Channel | Video Mediaset, Mediaset, Premium on Demand, Gallery, catch-up services of the various channels of the group, TG.com. | Medusa, Tao Due, Endemol (in association with Cyrte). | Elettronica industriale (terrestrial transmission), Mondadori, AC Milan, Mediolanum, Teatro Manzoni, retail online, record publishing |
| | | | 36 TV channels (GB, PL, Scandinavia, World), radio stations, 50% share in UKTV channels. | BBCiPlayer, Project YouView, channels on YouTube. | BBC Production | Sales of TV programmes, publishing, merchandising |
| | | | Conn-x TV Sports (3 channels) | | | |

Source: European Audiovisual Observatory

T.2.2

# Ranking by audiovisual turnover of the 50 leading audiovisual companies worldwide

## 2007-2010

USD million. Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, videogames retail of audiovisual products. Segments other than audiovisual (such as print publication, consumers' electronic, cable networks, facilities) are not included.

| Rank | Company | Country | Activities | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|---|
| 1 | Sony [1] [2] | JP | PROD, DIS, VG | 24 917 | 29 286 | 30 245 | 31 495 | ***4.1%*** |
| *p.m.* | BMG Sony *est.* [3] | US | REC | 4 280 | – | – | – | – |
| 2 | Walt Disney [4] | US | PROD, DIS, TV, VID, REC | 24 884 | 26 339 | 25 482 | 27 302 | ***7.1%*** |
| 3 | DirecTV | US | TV | 17 246 | 19 693 | 21 565 | 24 102 | ***11.8%*** |
| 4 | Time Warner | US | PROD, DIS, TV, VID | 21 952 | 22 552 | 22 019 | 23 839 | ***8.3%*** |
| 5 | News Corporation [5] | US | PROD, DIS, TV, VID | 21 248 | 20 429 | 22 699 | 23 475 | ***3.4%*** |
| 6 | NBC Universal | US | TV, PROD, DIS | 15 416 | 16 969 | 15 436 | 16 901 | ***9.5%*** |
| 7 | Vivendi Universal | FR | PROD, DIS, TV, VG | 15 007 | 15 921 | 17 133 | 16 552 | ***-3.4%*** |
| 8 | Viacom [6] | US | TV, PROD, DIS | 13 423 | 14 625 | 13 619 | 13 356 | ***-1.9%*** |
| 9 | Dish DBS Corporation | US | TV | 11 060 | 11 617 | 11 663 | 12 635 | ***8.3%*** |
| 10 | Nintendo | JP | VG | 16 724 | 18 761 | 15 474 | 12 240 | ***-20.9%*** |
| 11 | CBS Corp. | US | TV, RAD | 11 028 | 10 952 | 10 684 | 11 648 | ***9.0%*** |
| 12 | Liberty Media Corp. | US | TV | 9 378 | 9 817 | 10 158 | 10 982 | ***8.1%*** |
| 13 | Gamestop Corporation | US | VG (retail) | 7 094 | 8 806 | 9 078 | 9 474 | ***4.4%*** |
| 14 | Microsoft (Entertainment and Devices Division) | US | VG, IPTV software | 8 495 | 6 416 | 6 188 | 8 913 | ***44.0%*** |
| 15 | ARD | DE | TV, RAD | 8 912 | 8 352 | 8 806 | 8 295 | ***-5.8%*** |
| 16 | NHK | JP | TV, RAD | 6 903 | 6 804 | 7 179 | 8 207 | ***14.3%*** |
| 17 | BBC (Group) | GB | TV, RAD, PROD, DIS, VID | 8 779 | 6 684 | 7 257 | 8 035 | ***10.7%*** |
| 18 | Bertelsmann | DE | TV, PROD, DIS | 10 550 | 8 139 | 7 287 | 7 409 | ***1.7%*** |
| 19 | Fuji Media Holdings Inc. | JP | TV, PROD, Others | 5 802 | 5 787 | 6 298 | 7 108 | ***12.9%*** |
| 20 | Mediaset | IT | TV,PROD, DIS | 6 043 | 5 844 | 5 594 | 5 736 | ***2.5%*** |
| 21 | France Télévisions | FR | TV | 4 487 | 3 994 | 5 852 | 5 659 | ***-3.3%*** |
| 22 | Apple Inc. (Other music related products and service) [7] | US | MUS, VOD | 2 496 | 3 340 | 4 036 | 4 948 | ***22.6%*** |
| 23 | Globo - Comunicaçao e Participaçoes S.A | BR | TV, PROD [15] | 3 758 | 3 227 | 4 794 | ~ | ~ |
| 24 | Grupo Televisa | MX | TV, RAD, CIN, others | 3 722 | 3 481 | 4 015 | 4 670 | ***16.3%*** |
| 25 | RAI | IT | TV, RAD, PROD, DIS | 4 844 | 4 651 | 4 621 | 4 062 | ***-12.1%*** |
| 26 | Tokyo Broadcasting System | JP | TV, PROD, DIS | 3 177 | 3 610 | 4 016 | 4 136 | ***3.0%*** |
| 27 | ProSiebenSat.1 Media AG [8] | DE | TV | 4 003 | 4 339 | 4 030 | 4 025 | ***-0.1%*** |
| *p.m.* | SBS Broadcasting Holding B.V. [9] | LU | TV | 706 | – | – | – | – |
| 28 | Discovery Communications Inc. [10] | US | TV | 3 203 | 3 443 | 3 516 | 3 773 | ***7.3%*** |
| *p.m.* | Discovery Holding company | US | TV | 707 | – | – | – | – |
| 29 | TF1 | FR | TV, PROD, DIS | 4 069 | 3 611 | 3 564 | 3 745 | ***5.1%*** |
| 30 | Nippon Television Network | JP | TV | 3 450 | 3 336 | 3 203 | 3 595 | ***12.2%*** |
| 31 | Electronic Arts | US | VG | 3 665 | 4 212 | 3 654 | 3 589 | ***-1.8%*** |
| 32 | Blockbuster Inc. [11] | US | VID (retail) | 5 542 | 5 288 | 4 062 | 3 241 | ***-20.2%*** |
| 33 | ITV PLC | GB | TV | 4 171 | 2 958 | 3 043 | 3 231 | ***6.2%*** |
| 34 | HMV Group PLC | GB | VID, VG (retail) | 3 688 | 2 901 | 3 092 | 3 113 | ***0.7%*** |
| 35 | HSN Inc. | US | TV | 2 908 | 2 824 | 2 750 | 2 997 | ***9.0%*** |
| 36 | Warner Music Group | US | REC | 3 383 | 3 506 | 3 205 | 2 899 | ***-9.5%*** |
| 37 | CC Media Holding Inc. | US | RAD | 3 558 | 3 294 | 2 736 | 2 898 | ***5.9%*** |
| 38 | TV Asahi Corporation | JP | TV, MUS, VID | 2 447 | 2 541 | 2 483 | 2 841 | ***14.4%*** |
| 39 | ZDF | DE | TV | 2 837 | 2 675 | 2 975 | 2 627 | ***-11.7%*** |
| 40 | The Game Group PLC | GB | VG (retail) | 2 975 | 2 820 | 2 860 | 2 582 | ***-9.7%*** |
| 41 | Maltby Capital Ltd / EMI Ltd [12] | GB | REC | 2 903 | 2 250 | 2 501 | ~ | ~ |
| *p.m.* | EMI Group PLC [12] | GB | REC | – | – | – | – | – |
| 42 | Métropole Télévision (M6) | FR | TV, PROD | 2 027 | 1 904 | 1 999 | 1 977 | ***-1.1%*** |
| 43 | Univision Communications Inc [13] | US | TV, RAD, REC | 1 636 | 2 020 | 1 973 | ~ | ~ |

T.2.2

## Ranking by audiovisual turnover of the 50 leading audiovisual companies worldwide (Continued)

2007-2010 USD million. Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, videogames retail of audiovisual products. Segments other than audiovisual (such as print publication, consumers' electronic, cable networks, facilities) are not included.

| Rank | Company | Country | Activities | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| 44 | Regal Entertainment Group | US | EXH | 1 805 | 1 883 | 1 992 | 1 956 | -1.8% |
| 45 | Modern Times Group MTG AB | SE | TV, RAD | 1 850 | 1 918 | 1 993 | 1 954 | -2.0% |
| 46 | SRG SSR idée suisse | CH | TV, RAD | 1 447 | 1 529 | 1 559 | 1 768 | 13.4% |
| 47 | AMC Entertainment Inc. | US | EXH | 1 796 | 1 639 | 1 771 | 1 759 | -0.7% |
| 48 | Lagardère *est.* (14) | FR | TV, RAD, PROD, RET, Interactive | 1 815 | 1 768 | 1 599 | ~ | ~ |
| 49 | Corporacion de Radio y Television Espanola S.A. | ES | TV, RAD | 1 743 | 1 591 | 1 648 | 1 521 | -7.7% |
| 50 | Channel 4 | GB | TV, PROD, DIS | 1 893 | 1 314 | 1 345 | 1 464 | 8.8% |

1. The segmentation of activities has been reviewed by Sony in 2011. For the years 2008/2009 and 2009/2010, the segment 'Games' was renamed 'Networked Products & Services', including the PC VAIO. Data from columns 2008, 2009 and 2010 are for this reason not comparable with previous years.
2. The music turnover was not included in 2007.
3. 50% of Sony BMG revenues are included in Bertelsmann's consolidation in 2007. On 1 October 2008, Sony Corp. purchased Bertelsmann AG's 50% stake in the music company for USD 1.2 billion to get full control. The music company was renamed Sony Music Entertainment Inc. and became a unit of Sony Corporation of America. In 2008/2009 the operations of the company are included in Sony 'other activities'.
4. 2011 : 29 096.
5. Turnover as at 30 June of year + 1.
6. Data for 2010 are for 4 quarters calculated as at 31.9. For year 2011 (as at 31.9.2011) : 14 914.
7. Includes mainly the revenues of iTunes Store - 2011 : 6 314.
8. SBS has been consolidated in ProSiebenSat.1 Media since 1 July 2007.
9. 2007 over 6 months.
10. 2007 adjusted. The company was formed in September 2008 in connection with Discovery Holding Company and Advance/Newhouse Programming Partnership combining their respective ownership interests in Discovery Communications Holding, LLC and exchanging those interests with and into Discovery. Prior to the transaction, DCH was a stand-alone private company, which was owned approximately by DHC for 66,6% and by Advance/Newhouse for 33.3%.
11. Bankruptcy in 2010. The company was acquired in April 2011 by Dish Network.
12. Maltby Capital Ltd, a company owned by funds managed by Terra Firma, acquired EMI PLC on 17 August 2007. EMI was de-listed from London Stock exchange on 18 September 2007. On 4 October 2007 EMI ceased to be a public limited company and became EMI Group Ltd. The company was taken over in February 2011 by Citygroup. In November 2011, it was announced that EMI's recorded-music unit will be sold to Vivendi SA's Universal Music Group for $1.9 billion. A group spearheaded by Sony Corp.'s music division is to buy the publishing operation for $2.2 billion, according to a statement from the company.
13. 2007 over 9 months. Until then the fiscal year was at 31 March.
14. Audiovisual turnover includes: audiovisual activities of Lagardère Active, Virgin Stores, audiovisual activities of Lagardère Sports (acquisition of Sportfive in 2006).
15. All activities, including publishing.

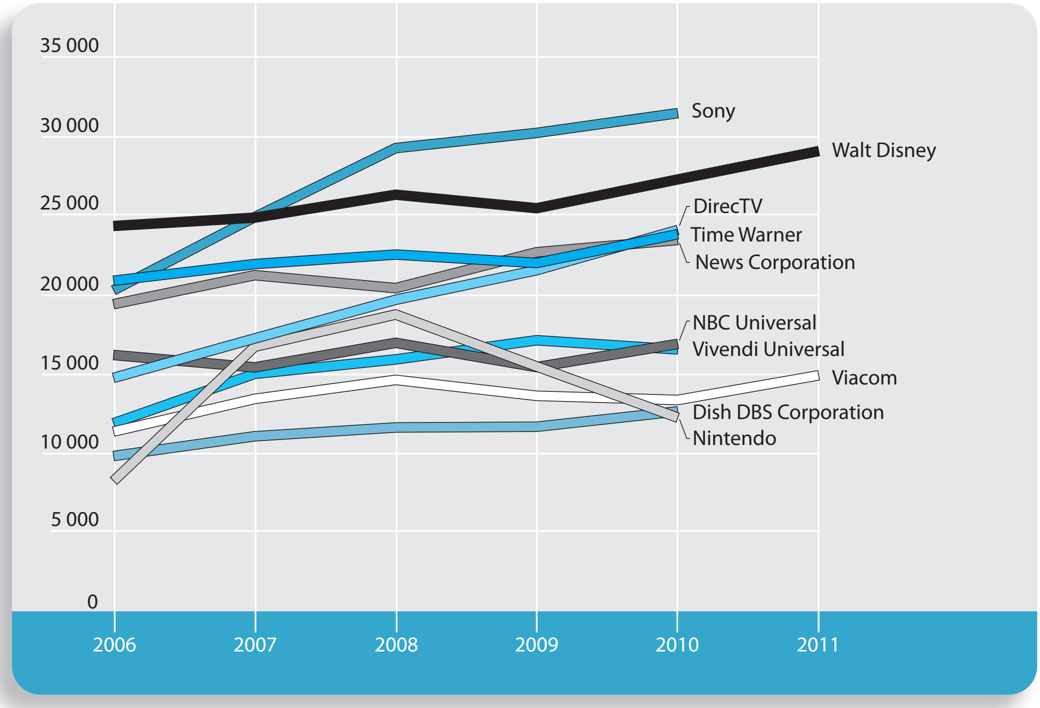
Source: European Audiovisual Observatory

2 3 4 5 6 7 8 9

G.2.1

## 10 leading audiovisual companies worldwide 2006-2011

Turnover in USD million. Includes activities in broadcasting, audiovisual on-demand services, film and TV production, distribution, exhibition, home video, recorded music, videogames retail of audiovisual products. Segments other than audiovisual (such as print publication, consumers' electronic, cable networks, facilities) are not included.



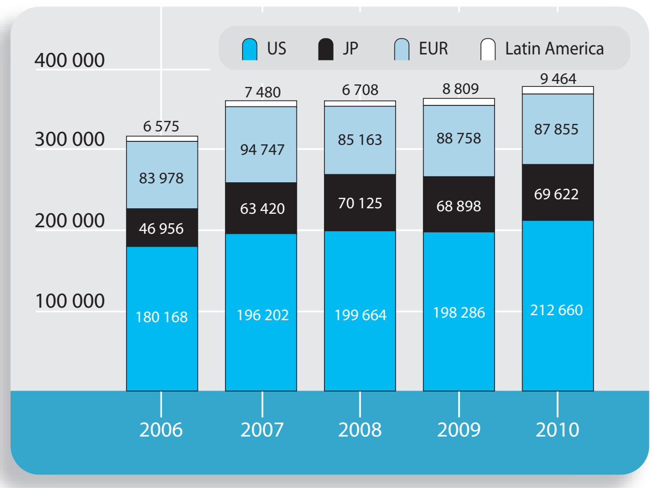

Source: European Audiovisual Observatory

G.2.2

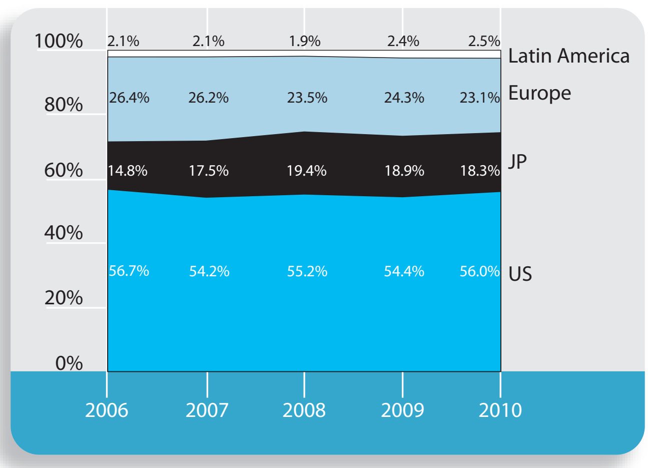
## Breakdown of the audiovisual worldwide market 2006-2010

Calculated on the breakdown of the audiovisual turnover of 50 leading world companies, by nationality of those companies. Data for China and Australia are not available.

USD million.




In %.




Source: European Audiovisual Observatory

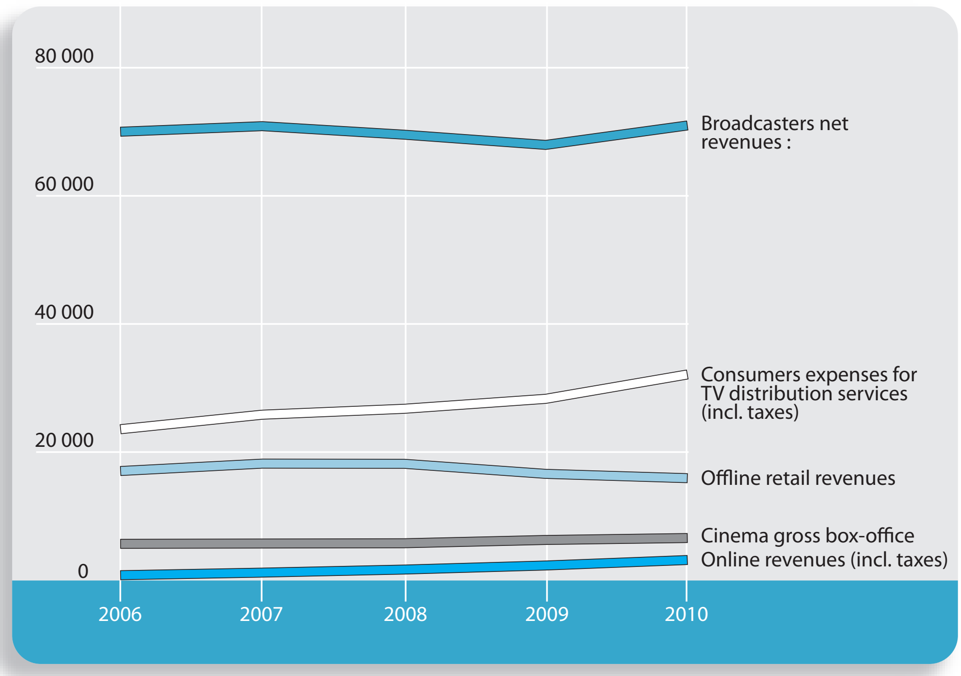
T.2.3
G.2.3

# Size of the audiovisual market of the European Union (EUR 27) 2006-2010 EUR million.

| | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 | Sources |
|---|---|---|---|---|---|---|---|
| ***Broadcasters net revenues*** | ***70 191*** | ***71 059*** | ***69 726*** | ***68 119*** | ***71 166*** | ***4.5%*** | OBS |
| Public broadcasters (incl. radio) | 31 775 | 32 013 | 31 676 | 31 884 | 32 368 | ***1.5%*** | OBS |
| Advertising TV | 21 598 | 21 655 | 20 711 | 18 864 | 20 342 | ***7.8%*** | OBS |
| Thematic channels | 8 863 | 9 317 | 9 484 | 9 990 | 10 592 | ***6.0%*** | OBS |
| Home shopping channels | 2 635 | 2 564 | 2 393 | 2 384 | 2 442 | ***2.4%*** | OBS |
| Regional and local TV *est.* | 1 353 | 1 515 | 1 579 | 1 509 | 1 581 | ***4.8%*** | OBS |
| Private radio *est.* | 3 967 | 3 995 | 3 883 | 3 488 | 3 841 | ***10.1%*** | OBS |
| ***Consumers expenses for TV distribution services (incl. taxes)*** | ***23 509*** | ***25 784*** | ***26 709*** | ***28 273*** | ***32 092*** | ***13.5%*** | OBS |
| Cable | 10 182 | 10 910 | 11 276 | 11 457 | 12 141 | ***6.0%*** | Screen Digest |
| Satellite | 12 578 | 13 550 | 13 446 | 13 809 | 15 564 | ***12.7%*** | Screen Digest |
| IPTV | 470 | 884 | 1 391 | 2 056 | 2 936 | ***42.8%*** | Screen Digest |
| DTT | 278 | 440 | 597 | 951 | 1 452 | ***52.7%*** | Screen Digest |
| ***Cinema gross box-office*** | ***5 524*** | ***5 567*** | ***5 611*** | ***6 125*** | ***6 428*** | ***4.9%*** | OBS |
| ***Offline retail revenues (incl. taxes)*** | ***16 947*** | ***18 107*** | ***18 080*** | ***16 501*** | ***15 823*** | ***-4.1%*** | OBS |
| VHS software (rental + retail) | 100 | – | – | – | – | – | Screen Digest |
| DVD software (rental + retail) | 10 726 | 10 493 | 9 259 | 8 065 | 7503 | ***-12.9%*** | Screen Digest |
| Blu-Ray (rental+retail) | 0 | 61 | 247 | 543 | 881 | ***62.2%*** | Screen Digest |
| Games offline | 6 121 | 7 554 | 8 574 | 7 893 | 7 440 | ***-5.7%*** | Screen Digest |
| ***Online revenues (incl. taxes)*** | ***598*** | ***1 003*** | ***1 482*** | ***2 119*** | ***2 980*** | ***40.6%*** | OBS |
| On line on demand TV revenues | 23 | 48 | 101 | 173 | 333 | ***92.2%*** | Screen Digest |
| On line on demand film revenues | 9 | 14 | 27 | 59 | 116 | ***97.1%*** | Screen Digest |
| Games online [1] | 566 | 941 | 1 353 | 1 887 | 2 532 | ***34.1%*** | Screen Digest |
| ***Total*** | ***111 245*** | ***115 953*** | ***115 997*** | ***115 012*** | ***122 061*** | ***6.1%*** | OBS |

[1] Largely multiplayer online games (both subscription and microtransaction-based games), PC casual games, Online Console Downloads.

EUR million.




Source: European Audiovisual Observatory

2 3 4 5 6 7 8 9

T.2.4

## VoD and NVoD consumer revenue in the European Union 2006-2010

EUR million.

| | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|
| NVoD and VoD revenues of TV distribution platforms | 908 | 1 144 | 1 255 | 1 206 | 1 412 | ***17.0%*** |
| - NVoD Films / TV programmes | 211 | 221 | 215 | 176 | 183 | ***4.1%*** |
| - NVoD Sports | 0 | 0 | 0 | 0 | 0 | ***0.0%*** |
| - VoD Films and TV programmes | 54 | 115 | 164 | 207 | 283 | ***36.4%*** |
| - Other (events, PVR access fee) | 631 | 766 | 786 | 717 | 817 | ***13.9%*** |
| - SVoD | 12 | 43 | 90 | 105 | 128 | ***21.9%*** |
| On line on demand TV revenues | 23 | 48 | 101 | 173 | 333 | ***92.2%*** |
| On line on demand film revenues | 9 | 14 | 27 | 59 | 116 | ***97.1%*** |
| | | | | | | |
| ***Total NVoD + PVR*** | ***843*** | ***987*** | ***1 001*** | ***894*** | ***1 001*** | ***12.0%*** |
| ***Total VoD + SVOD*** | ***97*** | ***220*** | ***382*** | ***544*** | ***860*** | ***57.9%*** |
| | | | | | | |
| ***Total*** | ***940*** | ***1 207*** | ***1 383*** | ***1 438*** | ***1 860*** | ***29.4%*** |

| | 2007/06 | 2008/07 | 2009/08 | 2010/09 | *Average yearly growth* |
|---|---|---|---|---|---|
| NVoD and VoD revenues of TV distribution platforms | 26.0% | 9.7% | -3.9% | 17.0% | ***11.7%*** |
| - NVoD Films / TV programmes | 4.6% | -2.9% | -17.9% | 4.1% | ***-3.5%*** |
| - NVoD Sports | 9.4% | -4.2% | -35.7% | -16.2% | ***-13.3%*** |
| - VoD Films and TV programmes | 112.7% | 42.7% | 26.5% | 36.4% | ***51.3%*** |
| - Other (events, PVR access fee) | 21.2% | 2.7% | -8.8% | 13.9% | ***6.7%*** |
| - SVoD | 268.6% | 110.5% | 17.3% | 21.9% | ***82.5%*** |
| On line on demand TV revenues | 112.8% | 110.8% | 70.8% | 92.2% | ***95.9%*** |
| On line on demand film revenues | 55.0% | 91.0% | 115.8% | 97.1% | ***88.4%*** |
| | | | | | |
| ***Total NVoD + PVR*** | ***17.1%*** | ***1.5%*** | ***-10.7%*** | ***12.0%*** | ***1.5%*** |
| ***Total VoD + SVOD*** | ***125.8%*** | ***73.9%*** | ***42.5%*** | ***57.9%*** | ***53.8%*** |
| | | | | | |
| ***Total*** | ***28.3%*** | ***14.6%*** | ***4.0%*** | ***29.4%*** | ***11.2%*** |

Source: Screen Digest

Chapter
Chapitre
*Kapitel*
3

# Radio and television companies in Europe

# Les entreprises de radio et télévision en Europe

# *Hörfunk- und Fernseh-unternehmen in Europa*

## Analysis of the broadcasting activities

In order to carry out a financial analysis of the radio and television sector in the European Union, we have followed the same principles this year as we did for the 2009 and 2010 editions. Companies are divided into four large categories: public radio and television broadcasters, providers of general-interest channels funded by advertising, providers of thematic channels, providers of teleshopping channels. We have excluded from the scope of the analysis companies that are both providers of TV services and operators of satellite distribution platforms (BSkyB, Sky Italia, Sky Deutschland, Canal+ Distribution, etc.). Their company accounts do not enable the respective parts of the operating income relating to production and distribution to be separated. We have assumed the main activity to be distribution and have accordingly moved the discussion of this type of company to chapter 5. These companies are competing with those that run other distribution platforms (cable, IPTV, pay digital terrestrial television, broadcasting to mobiles).

We have carried out a detailed review of the companies that belong to the four categories, basing our study, as in previous years, on the information available in BVDEP's AMADEUS database supplemented by our own data. This database is not entirely exhaustive in the case of small companies but is complete as far as the providers of the principal channels are concerned. As in the past, we have endeavoured to ensure the consistency of the sets of data over a five-year period (2006-2010). A total of 885 companies were in operation but not all of them throughout the period: the number rose from 702 in 2006 to 726 in 2008 and dropped to 655 in 2010, which means that more than 70 companies disappeared in two years. In a very small number of cases, this was the result of a merger but most were quite simply due to bankruptcy – a clear consequence of the 2008-2009 recession.

Owing to the 2008-2009 recession, the average annual growth rate of the industry as a whole over the period was very low at just 0.3%. Providers of special-interest channels, which are mainly funded by subscription revenues, enjoyed average annual growth of 4.6%, whereas providers of general-interest channels funded by advertising and broadcasters of teleshopping channels recorded negative annual growth (averaging -1.5 and -1.9% respectively). Public sector companies had weak growth (0.5%). However, 2010 provided an opportunity for a substantial rebound for providers of channels funded by advertising (+7.8%). Providers of thematic channels continued to post sustained growth (+ 6%), whereas the growth

## L'analyse des activités d'édition de services de télévision

Pour procéder à l'analyse financière du secteur de la radio-télévision dans l'Union européenne, nous avons suivi cette année les mêmes principes que ceux adoptés dans les éditions 2009 et 2010. Les entreprises sont réparties en 4 grandes familles : entreprises de radio-télévision publiques, entreprises éditrices de chaînes généralistes financées par la publicité, entreprises éditrices de chaînes thématiques, entreprises éditrices de chaînes de téléachat. Nous avons exclu du champ de l'analyse les entreprises qui sont à la fois éditrices et opérateurs de plates-formes de distribution par satellite (BSkyB, Sky Italia, Sky Deutschland, Canal+ Distribution, etc.). Les comptes de ces entreprises ne permettent pas de distinguer quelles sont les parts respectives du produit d'exploitation réalisée dans les activités d'édition et de distribution. Nous avons pris pour hypothèse que l'activité principale était la distribution et donc reporté ce type d'entreprise dans le chapitre 5. Ces entreprises se trouvent en effet en concurrence avec les entreprises gérant d'autres plates-formes de distribution (câble, IPTV, numérique terrestre payant, diffusion vers les mobiles).

Nous avons procédé à une révision détaillée des populations des 4 catégories, en nous basant, comme les années précédentes, sur les informations disponibles dans la base AMADEUS, éditée par BVDEP et complétée par nos soins. Cette base n'est pas complètement exhaustive en ce qui concerne les petites entreprises mais est par contre très complète en ce qui concerne les entreprises éditrices des principales chaînes. Nous avons, comme au cours des années précédentes, cherché à assurer une cohérence des séries sur une période de cinq ans (2006-2010). La population cumulée, sur 5 ans, comporte 885 entreprises actives. Cependant toutes n'ont pas été actives sur la période : le nombre est passé de 702 entreprises actives en 2006 à 726 en 2008 pour retomber à 655 en 2010. Plus de 70 entreprises ont donc disparu en deux ans. Dans un nombre minime de cas, il s'agit du résultat de concentrations, mais, dans la plupart des cas, il s'agit de faillites pures et simples, conséquence évidente de la récession des années 2008-2009.

En raison de la récession des années 2008-2009, le taux de croissance annuel moyen de l'ensemble de la branche sur la période a été très faible : 0,3 %. Les entreprises éditrices de chaînes thématiques, financées essentiellement par les revenus d'abonnements ont connu une croissance annuelle moyenne de 4,6 % alors que les entreprises de chaînes généralistes financées par la

## *Analyse des Betriebs von Fernsehdiensten*

Bei der finanziellen Analyse des Hörfunk und Fernsehsektors folgten wir in diesem Jahr denselben Prinzipien wie in den Ausgaben 2009 und 2010. Die Unternehmen sind in vier große Gruppen unterteilt: öffentlich-rechtliche Rundfunkunternehmen, Veranstalter von werbefinanzierten Vollprogrammen, Veranstalter von Spartenprogrammen sowie Betreiber von Teleshopping-Kanälen. Unternehmen, die sowohl Satellitenplattformen als auch deren Dienste betreiben (BSkyB, Sky Italia, Sky Deutschland, Canal+ Distribution u. a.), wurden aus dieser Untersuchung ausgeschlossen. Die Jahresabschlüsse dieser Unternehmen erlauben es nicht zu unterscheiden, welcher Teil des Betriebsertrags jeweils dem technischen und dem inhaltlichen Bereich zuzuschreiben ist. Wir sind davon ausgegangen, dass die Verbreitung das Kerngeschäft ausmacht, weshalb wir diesen Unternehmenstyp in Kapitel 5 eingehender behandeln. Diese Unternehmen stehen nämlich in Konkurrenz zu den Betreibern anderer Verbreitungsplattformen (Kabel, IPTV, digitales terrestrisches Bezahlfernsehen oder Mobilfernsehen).

Die jeweilige Population sämtlicher vier Kategorien wurde gründlich überprüft, wobei wir uns wie in den Vorjahren auf die Informationen aus der Datenbank AMADEUS gestützt haben, die von BVDEP erstellt und von uns vervollständigt wurde. Diese Datenbank erfasst die kleinen Unternehmen nicht ganz vollständig, sehr wohl aber die Veranstalter der wichtigsten Sender. Wie in den Vorjahren ging es uns um die Erstellung einer kohärenten Datenreihe für einen Fünfjahreszeitraum (2006-2010). Die über fünf Jahre kumulierte Population umfasst 885 aktive Unternehmen, von denen allerdings nicht alle im gesamten Zeitraum aktiv waren: Waren 2006 ursprünglich 702 Unternehmen aktiv, stieg ihre Zahl 2008 auf 726 an und fiel 2010 wieder auf 655 zurück. Damit sind innerhalb von zwei Jahren über 70 Unternehmen verschwunden. In ganz wenigen Fällen war dies das Ergebnis von Übernahmen, meistens jedoch meldeten die Unternehmen schlicht Konkurs an – eine offensichtliche Konsequenz der Rezession der Jahre 2008-2009.

Aufgrund der Rezession in den Jahren 2008-2009 war die durchschnittliche jährliche Wachstumsrate in der gesamten Branche im genannten Zeitraum sehr niedrig (0,3 %). Die Veranstalter von Spartenprogrammen, die sich im Wesentlichen über Abo-Einnahmen finanzieren, verzeichneten ein jährliches Wachstum von durchschnittlich 4,6 %, während bei den Veranstaltern von werbefinanzierten Vollprogrammen und von Teleshopping-recorded by broadcasters of teleshopping channels and by public broadcasters was more modest (+2.4% and +1.5% respectively). The different company categories posted varying improvements in their individual performance ratios.

It should be noted that the public sector as a whole remained negative over the period. However, this was partly due to a peculiarity in the way most broadcasters in Spain's Autonomous Communities are funded: public funding is provided in the form of capital grants and does not appear in the profit and loss accounts. If these companies are excluded from the population, the pre-tax income of the category is consistently positive over the period and the net income is only negative in 2006 and 2008.

The obvious consequence of the 2010 recovery combined with the disappearance of a significant number of companies is an increase in average company size: the average asset total rose from 108 million euros in 2009 to 124 in 2010, and average income went up from 91 million euros in 2009 to100 million in 2010.

publicité et les entreprises éditrices de chaînes de téléachat ont connu un taux de croissance annuel moyen négatif (respectivement -1,5 et -1,9 %). Les entreprises du secteur public ont eu un taux de croissance faible (0,5 %). L'année 2010 a cependant été l'occasion d'une reprise marquée pour les entreprises éditrices de chaînes financées par la publicité (+7,8 %). Les entreprises éditrices de chaînes thématiques ont continué leur croissance à un taux soutenu (+6%), tandis que les entreprises éditrices de chaînes de téléachat et les entreprises publiques connaissaient une croissance plus modeste (respectivement +2,4 % et +1,5 %). Les différentes familles d'entreprises ont connu une amélioration des différents ratios de performances.

On notera que l'ensemble du secteur public reste déficitaire sur la période, mais ceci est en grande partie dû à une particularité du mode de financement de la plupart des entreprises de radio-télévision des Communautés autonomes espagnoles : les financements publics se font sous forme d'apports en capitaux et n'apparaissent pas dans les comptes de résultat. Si l'on exclut ces entreprises de la population, les résultats avant impôts de la famille sont systématiquement positifs sur la période et le résultat net ne se trouve en négatif qu'en 2006 et en 2008.

La conséquence claire de la reprise de 2010 conjuguée à la disparition d'un nombre significatif d'entreprises est la croissance de la taille moyenne des entreprises : le total des actifs moyen est passé de 108 millions EUR en 2009 à 124 en 2010 et le revenu moyen est passé de 91 millions EUR en 2009 à 100 millions en 2010.

Kanälen ein negatives Wachstum registriert wurde (im jährlichen Durchschnitt -1,5 bzw. -1,9 %). Die Unternehmen aus dem öffentlich-rechtlichen Sektor erzielten ein schwaches Wachstum (0,5 %). Dagegen brachte das Jahr 2010 für die Veranstalter von werbefinanzierten Sendern einen deutlichen Aufschwung (+7,8 %). Die Betreiber von Spartenprogrammen konnten ihr deutliches Wachstum (+6 %) beibehalten, während die Veranstalter von Teleshopping-Kanälen und die öffentlich-rechtlichen Unternehmen ein bescheideneres Wachstum verzeichneten (+2,4 % bzw. +1,5 %). Bei den verschiedenen Unternehmensgruppen verbesserten sich die unterschiedlichen Leistungskennziffern.

Im genannten Zeitraum verzeichnete der gesamte öffentlich-rechtliche Sektor ein Defizit, was allerdings zu einem großen Teil auf eine Besonderheit der Finanzierungsweise der meisten Hörfunk- und Fernsehunternehmen der spanischen Autonomen Gemeinschaften zurückzuführen ist: Die öffentliche Finanzierung erfolgt in Form von Kapitaleinlagen und taucht nicht in der Ertragsrechnung auf. Werden diese Unternehmen aus der Population der erfassten Unternehmen gestrichen, sind die Vorsteuerergebnisse der Gruppe in diesem Zeitraum stets positiv und das Nettoergebnis war lediglich 2006 und 2008 negativ.

Als klare Konsequenz des Aufschwungs 2010, der mit dem Konkurs einer signifikanten Anzahl von Unternehmen einherging, nahm die Durchschnittsgröße der Unternehmen zu: Der Durchschnittswert der Aktiva stieg von 108 Mio. EUR 2009 auf 124 Mio. 2010 an und das Durchschnittseinkommen steigerte sich von 91 Mio. EUR 2009 auf 100 Mio. 2010.

Source: European Audiovisual Observatory

T.3.1

## Financial indicators and ratios
## 2010

| Indicators | Ratios |
|---|---|
| **Operating revenue** | Sales + Capitalised production + Other operating revenues |
| **Operating profit (loss)** | Operating revenues – (Cost of Goods Sold + Other operating costs) |
| **Profit (loss) before tax** | Operating profit + Financial profit |
| **P/L (for Period)** | Profit after Taxation + Extraordinary Profit |
| | |
| **Solvency (%)** | (Shareholders Funds/Total Assets) X 100 |
| | |
| **Operating margin (%) (= EBIT margin)** | (Operating Profit / Operating revenues) X 100 |
| **Return on shareholders funds (%)** | (Profit before Taxation / Shareholders Funds) X 100 |
| **Profit margin (%)** | (Profit before Taxation / Operating revenues) X 100 |
| **Return on assets (%)** | (Profit before Taxation / Total Assets) X 100 |

| Indicateurs | Ratios |
|---|---|
| **Produit d'exploitation** | Ventes + Production immobilisée + Autres recettes opérationnelles |
| **Résultat d'exploitation** | Produit d'exploitation – (Coût des ventes + Autres dépenses opérationnelles) |
| **Résultat avant impôt** | Résultat d'exploitation + Résultat financier |
| **Résultat net** | Résultat après taxation + Résultats exceptionnels |
| | |
| **Solvabilité (%)** | (Fonds propres/Actifs) X 100 |
| | |
| **Marge d'exploitation (%)** | (Résultat d'exploitation / Produit d'exploitation) X 100 |
| **Retour sur fonds propres (%)** | (Résultat avant taxes / Fonds propres) X 100 |
| **Marge bénéficiaire (%)** | (Résultat avant taxes /Produit d'exploitation) X 100 |
| **Retour sur actifs (%)** | (Résultat avant taxes / Total des actifs) X 100 |

| Indikatoren | Kennzahlen |
|---|---|
| **Betriebsertrag** | Umsatz + aktivierte Eigenleistung + andere Erträge |
| **Betriebsergebnis** | Betriebsertrag – (Verkaufskosten + andere Betriebsaufwendungen) |
| **Ergebnis vor Steuern** | Betriebsergebnis + Finanzergebnis |
| **Nettoergebnis** | Ergebnis vor Steuern + Sonderergebnis |
| | |
| **Liquiditätsmarge (%)** | (Eigenkapital / Aktivvermögen) X 100 |
| | |
| **Betriebsspanne (%)** | (Betriebsergebnis / Betriebsertrag) X 100 |
| **Eigenkapitalertrag (%)** | (Ergebnis vor Steuern / Eigenkapital) X 100 |
| **Gewinnspanne (%)** | (Ergebnis vor Steuern / Betriebsertrag) X 100 |
| **Ertrag aus dem Aktivvermögen (%)** | (Ergebnis vor Steuern / Aktivvermögen) X 100 |

Source: European Audiovisual Observatory

T.3.2

## The 50 leading European television companies 2007-2010

Unconsolidated operating revenues (EUR million, current rate).

| Rank | Company | Country | Activities | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| 1 | BBC Home Service | GB | TV+RAD | 4 288.8 | 3 866.7 | 4 037.5 | 4 231.1 | 4.8% |
| 2 | France Télévisions [1] | FR | TV | 2 704.0 | 2 579.3 | 3 118.1 | 3 256.4 | 4.4% |
| 3 | Reti Televisive Italiane R.T.I. (R.T.I.) | IT | TV | 2 577.0 | 2 724.7 | 2 707.5 | 2 936.5 | 8.5% |
| 4 | RAI | IT | TV+RAD | 3 002.1 | 3 057.7 | 2 985.3 | 2 835.2 | -5.0% |
| 5 | ITV Broadcasting Ltd | GB | TV | 1 660.3 | 1 293.1 | 1 227.0 | 1 470.5 | 19.8% |
| 6 | ZDF | DE | TV | 1 927.2 | 1 922.0 | 2 065.1 | 1 965.9 | -4.8% |
| 7 | Canal Plus (cons.) | FR | TV | 1 740.0 | 1 813.0 | 1 775.0 | 1 787.0 | 0.7% |
| 8 | TF1 | FR | TV | 1 824.0 | 1 759.0 | 1 587.0 | 1 660.0 | 4.6% |
| 9 | RTL Television GmbH | DE | TV | 1 692.9 | 1 703.6 | 1 415.9 | 1 562.2 | 10.3% |
| 10 | WDR - Westdeutscher Rundfunk | DE | TV+RAD | 1 311.4 | 1 293.0 | 1 310.7 | 1 333.7 | 1.8% |
| 11 | SRG-SSR idée suisse (cons.) | CH | TV+RAD | 983.3 | 1 098.5 | 1 081.8 | 1 323.0 | 22.3% |
| 12 | SWR -Südwestrundfunk | DE | TV+RAD | 1 096.1 | 1 099.0 | 1 122.1 | 1 132.1 | 0.9% |
| 13 | Corporacion de Radio y Television Espanola | ES | TV+RAD | 1 383.8 | 1 143.0 | 1 143.7 | 1 126.4 | -1.5% |
| 14 | NDR - Norddeutscher Rundfunk | DE | TV+RAD | 1 042.0 | 1 050.0 | 1 060.4 | 1 081.3 | 2.0% |
| 15 | ITV Network Ltd | GB | TV | 1 461.5 | 1 092.2 | 1 000.5 | 1 053.6 | 5.3% |
| 16 | BR - Bayerischer Rundfunk | DE | TV+RAD | 955.2 | 928.0 | 978.7 | 974.8 | -0.4% |
| 17 | ORF | AT | TV+RAD | 969.1 | 943.0 | 892.7 | 948.9 | 6.3% |
| 18 | NPO | NL | TV+RAD | 842.6 | 821.5 | 829.2 | 857.2 | 3.4% |
| 19 | Métropole Télévision (M6) | FR | TV | 770.0 | 758.0 | 730.0 | 809.0 | 10.8% |
| 20 | Channel 4 | GB | TV | 973.4 | 770.5 | 646.5 | 751.7 | 16.3% |
| 21 | Sat.1 Satellitenfernsehen GmbH | DE | TV | 841.1 | 742.9 | 740.1 | ~ | ~ |
| 22 | QVC Deutschland (cons.) | DE | TV | 624.6 | 680.3 | 695.0 | ~ | ~ |
| 23 | Gestevision Telecinco S.A. | ES | TV | 913.2 | 822.3 | 535.6 | 692.3 | 29.3% |
| 24 | ProSieben Television GmbH | DE | TV | 734.2 | 730.6 | 687.1 | ~ | ~ |
| 25 | CLT-UFA S.A. | LU | TV | 687.4 | 681.9 | 602.8 | 680.4 | 12.9% |
| 26 | Antena 3 de Televisiòn S.A. | ES | TV | 878.0 | 722.3 | 604.4 | 657.3 | 8.8% |
| 27 | MDR - Mitteldeutscher Rundfunk | DE | TV+RAD | 622.1 | 630.0 | 648.4 | 655.5 | 1.1% |
| 28 | NRK | NO | TV+RAD | 496.1 | 439.3 | 540.4 | 620.9 | 14.9% |
| 29 | Pervyi Kanal | RU | TV | 574.6 | 608.2 | 504.1 | 601.2 | 19.3% |
| 30 | Viasat Broadcasting | GB | TV | 459.2 | 370.0 | 409.9 | 580.4 | 41.6% |
| 31 | Danmarks Radio | DK | TV+RAD | 484.4 | 499.5 | 502.9 | 514.8 | 2.4% |
| 32 | Vox Television GmbH | DE | TV | 449.9 | 492.3 | 439.9 | 514.7 | 17.0% |
| 33 | VGTRK | RU | TV | 615.3 | 599.2 | 449.2 | 495.4 | 10.3% |
| 34 | HR - Hessischer Rundfunk | DE | TV+RAD | 458.5 | 452.0 | 458.5 | 475.3 | 3.7% |
| 35 | Sveriges Television AB | SE | TV | 426.7 | 363.5 | 371.0 | 463.5 | 24.9% |
| 36 | QVC Ltd | GB | TV | 479.9 | 376.7 | 411.8 | 453.7 | 10.2% |
| 37 | Telewizja Polska S.A. | PL | TV | 588.8 | 536.2 | 431.1 | 453.5 | 5.2% |
| 38 | CET 21 S.R.O. | CZ | TV | 443.4 | 432.2 | 441.9 | ~ | ~ |
| 39 | VRT | BE | TV+RAD | 453.3 | 449.2 | 450.5 | 444.1 | -1.4% |
| 40 | Discovery Communications Europe | US | TV | 328.8 | 293.7 | 396.7 | 424.7 | 7.1% |
| 41 | TVN S.A. | PL | TV | 383.6 | 404.7 | 418.7 | 421.2 | 0.6% |
| 42 | YLE | FI | TV+RAD | 409.1 | 397.5 | 411.2 | 420.0 | 2.1% |
| 43 | Televisio de Catalunya | ES | TV | 148.5 | 382.3 | 385.3 | 408.4 | 6.0% |
| 44 | RBB - Rundfunk Berlin Brandenburg | DE | TV+RAD | 393.0 | 392.0 | 399.1 | 403.6 | 1.1% |
| 45 | NTV Telekompanyia | RU | TV | 380.7 | 427.0 | 272.4 | 397.7 | 46.0% |
| 46 | Prisa (Cuatro) | ES | TV | 287.5 | 490.0 | 427.9 | 379.6 | -11.3% |
| 47 | Home Shopping Europe AG | DE | TV | 320.0 | 352.6 | 379.2 | ~ | ~ |
| 48 | RTE | IE | TV+RAD | 441.2 | 440.8 | 374.9 | 371.7 | -0.9% |
| 49 | Eurosport | FR | TV | 275.3 | 318.3 | 315.5 | 360.8 | 14.4% |
| 50 | Audiovisuel extérieur de la France | FR | TV+RAD | – | 249.5 | 258.6 | 357.3 | 38.2% |

[1] The various public television companies were completely merged in France Télévisions as at 1.1.2010.

Source: European Audiovisual Observatory

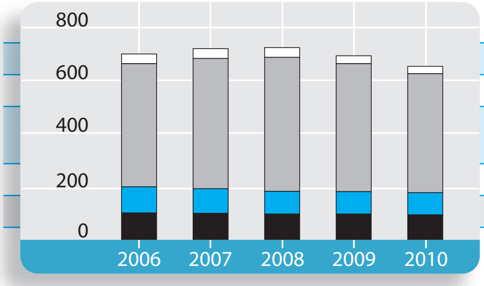
2 3 4 5 6 7 8 9

T.3.3
G.3.1

# Financial situation of television companies in the European Union (EUR 27) 2006-2010

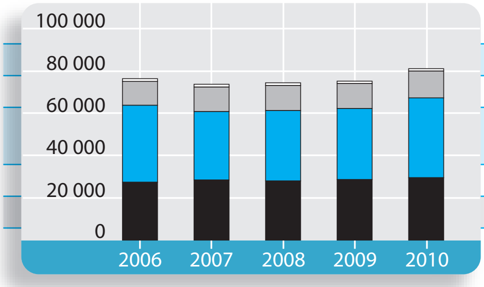
Categories and Population have been reviewed and are not comparable with the previous editions.

## Number of companies included



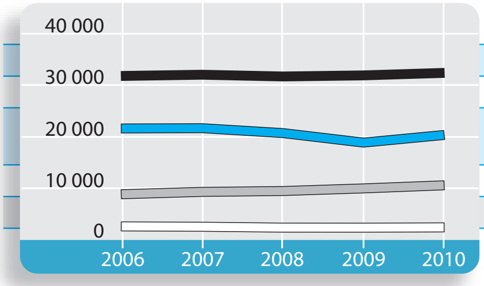

| In units | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | 100 | 99 | 96 | 96 | 93 |
| Advertising TV | 99 | 93 | 86 | 85 | 84 |
| Thematic channels | 466 | 493 | 507 | 484 | 450 |
| Home shopping channels | 37 | 37 | 37 | 30 | 28 |
| ***Total*** | ***702*** | ***722*** | ***726*** | ***695*** | ***655*** |

## Total Assets



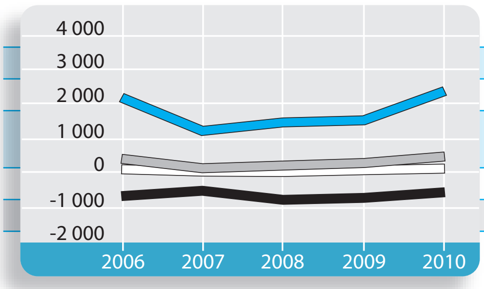

| EUR million | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | 28 501 | 28 073 | 28 675 | 29 567 | ***3.1%*** |
| Advertising TV | 32 392 | 33 322 | 33 682 | 37 844 | ***12.4%*** |
| Thematic channels | 11 626 | 11 865 | 11 865 | 12 688 | ***6.9%*** |
| Home shopping channels | 1 338 | 1 291 | 1 107 | 1 144 | ***3.3%*** |
| ***Total*** | ***73 857*** | ***74 551*** | ***75 329*** | ***81 243*** | ***7.9%*** |

## Operating revenue



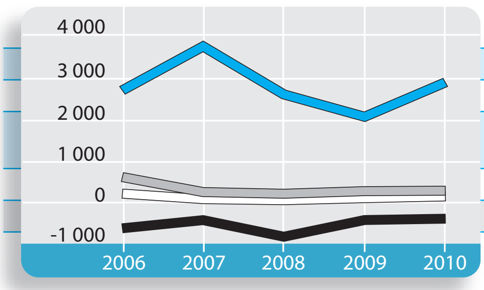

| EUR million | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | 32 013 | 31 676 | 31 884 | 32 368 | ***1.5%*** |
| Advertising TV | 21 655 | 20 711 | 18 864 | 20 342 | ***7.8%*** |
| Thematic channels | 9 317 | 9 484 | 9 990 | 10 592 | ***6.0%*** |
| Home shopping channels | 2 564 | 2 393 | 2 384 | 2 442 | ***2.4%*** |
| ***Total*** | ***65 549*** | ***64 264*** | ***63 122*** | ***65 744*** | ***4.2%*** |

## Operating profit (Loss)




| EUR million | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | -499 | -761 | -705 | -541 | ***-23.2%*** |
| Advertising TV | 1 238 | 1 484 | 1 545 | 2 393 | ***54.8%*** |
| Thematic channels | 155 | 232 | 306 | 495 | ***61.6%*** |
| Home shopping channels | 58 | 46 | 99 | 144 | ***46.1%*** |
| ***Total*** | ***952*** | ***1 002*** | ***1 246*** | ***2 491*** | ***100.0%*** |

## Profit (loss) before tax




| EUR million | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | -429 | -831 | -427 | -395 | ***-7.6%*** |
| Advertising TV | 3 777 | 2 615 | 2 073 | 2 905 | ***40.1%*** |
| Thematic channels | 250 | 210 | 273 | 283 | ***3.8%*** |
| Home shopping channels | 79 | 54 | 103 | 145 | ***40.4%*** |
| ***Total*** | ***3 678*** | ***2 047*** | ***2 022*** | ***2 938*** | ***45.3%*** |

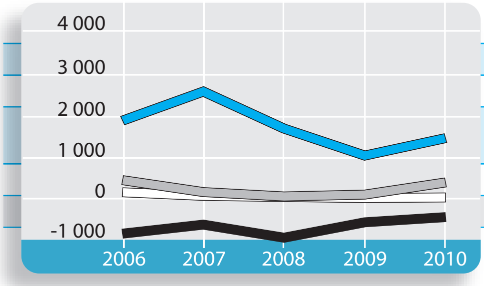
T.3.3
G.3.1

# Financial situation of television companies in the European Union (EUR 27) (Continued)

## 2006-2010

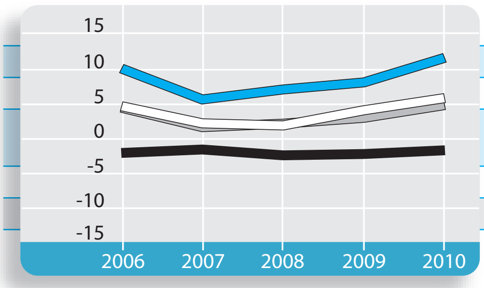
Categories and Population have been reviewed and are not comparable with the previous editions.

### Profit (loss) for period



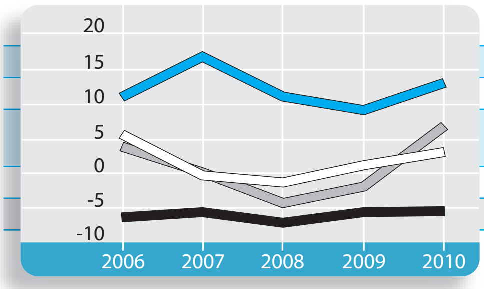

| EUR million | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | -634 | -950 | -577 | -452 | *-21.7%* |
| Advertising TV | 2 589 | 1 693 | 1 039 | 1 461 | *40.7%* |
| Thematic channels | 155 | 49 | 94 | 388 | *315.3%* |
| Home shopping channels | 63 | 36 | 10 | 25 | *140.8%* |
| ***Total*** | ***2 173*** | ***827*** | ***565*** | ***1 422*** | ***151.6%*** |

### Operating margin



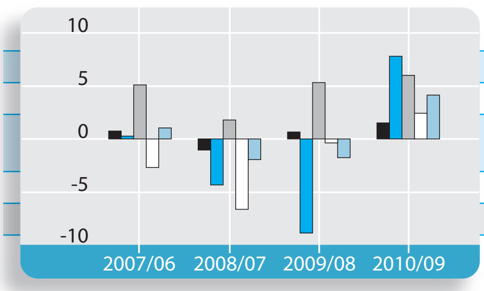

| In % | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | -2.1 | -1.6 | -2.4 | -2.2 | -1.7 |
| Advertising TV | 10.2 | 5.7 | 7.2 | 8.2 | 11.8 |
| Thematic channels | 4.5 | 1.7 | 2.2 | 3.0 | 4.9 |
| Home shopping channels | 4.7 | 2.2 | 1.9 | 4.1 | 5.9 |
| ***Total*** | ***3.2*** | ***1.5*** | ***1.6*** | ***2.0*** | ***3.8*** |

### Profit margin



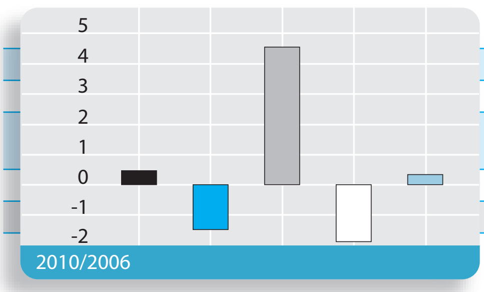

| In % | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Public broadcasters (incl. radio) | -2.0 | -1.3 | -2.6 | -1.3 | -1.2 |
| Advertising TV | 12.6 | 17.4 | 12.6 | 11.0 | 14.3 |
| Thematic channels | 6.6 | 3.5 | -0.2 | 1.7 | 9.1 |
| Home shopping channels | 8.1 | 3.1 | 2.2 | 4.3 | 5.9 |
| ***Total*** | ***4.5*** | ***5.6*** | ***3.2*** | ***3.2*** | ***4.5*** |

### Growth of operating revenue




| In % | 2007 /2006 | 2008 /2007 | 2009 /2008 | 2010 /2009 |
|---|---|---|---|---|
| Public broadcasters (incl. radio) | 0.7 | -1.1 | 0.7 | 1.5 |
| Advertising TV | 0.3 | -4.4 | -8.9 | 7.8 |
| Thematic channels | 5.1 | 1.8 | 5.3 | 6.0 |
| Home shopping channels | -2.7 | -6.7 | -0.4 | 2.4 |
| ***Total*** | ***1.0*** | ***-2.0*** | ***-1.8*** | ***4.2*** |

### Average yearly growth of operating revenue




| In % | 2010/06 |
|---|---|
| Public broadcasters (incl. radio) | *0.5%* |
| Advertising TV | *-1.5%* |
| Thematic channels | *4.6%* |
| Home shopping channels | *-1.9%* |
| ***Total*** | ***0.3%*** |

Source: European Audiovisual Observatory

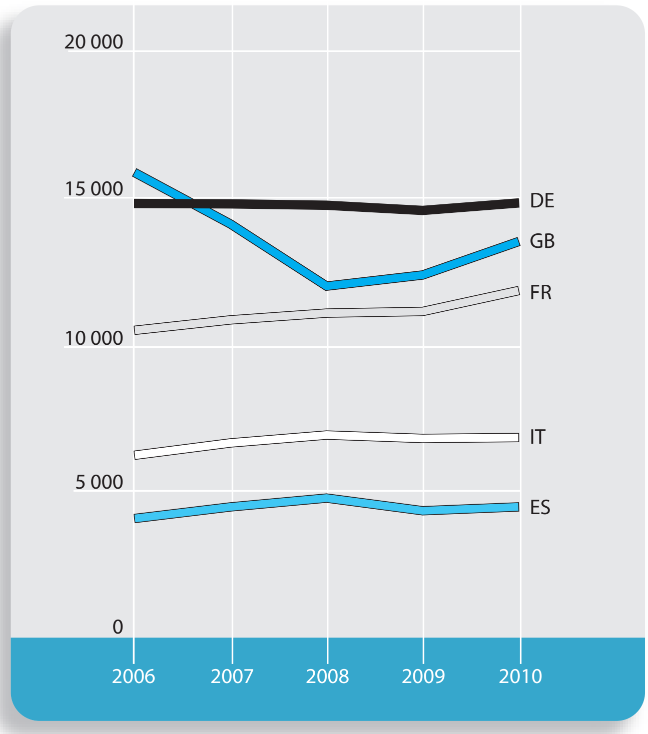
T.3.4
G.3.2

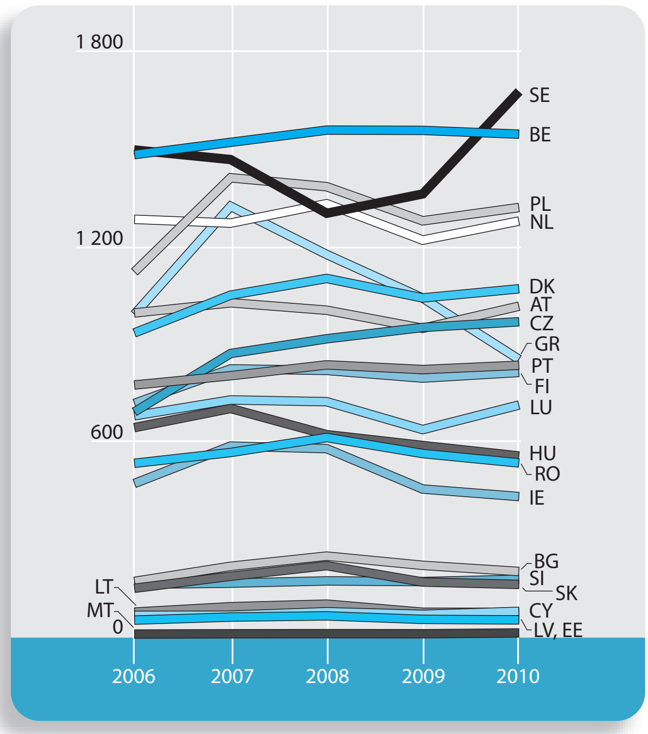
# Operating revenues of television companies in Europe
## 2006-2010

Based on unconsolidated accounts. Includes autonomous public service radio companies. Does not include small regional, local or thematical television channels nor satellite packagers (such as BSkyB, Sky Deutschland,…).

EUR million. Population reviewed in some countries since the previous edition.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|
| **AT** ❶ | 995.2 | 1 026.6 | 1 003.6 | 947.8 | 1 015.9 | ***7.2%*** |
| **BE** ❷ | 1 483.4 | 1 521.4 | 1 559.1 | 1 558.2 | 1 544.6 | ***-0.9%*** |
| **BG** ❸ | 167.3 | 213.9 | 245.3 | 216.8 | 197.9 | ***-8.7%*** |
| **CY** ❷ | 62.5 | 63.0 | 73.6 | 65.5 | 74.8 | ***14.2%*** |
| **CZ** *est.* ❶ | 690.4 | 870.1 | 915.5 | 950.5 | 968.0 | ***1.8%*** |
| **DE** ❶❷❸ | 14 809.8 | 14 795.5 | 14 748.5 | 14 570.7 | 14 827.6 | ***1.8%*** |
| **DK** | 933.9 | 1 050.1 | 1 101.6 | 1 041.5 | 1 069.7 | ***2.7%*** |
| **EE** | 47.9 | 57.2 | 60.9 | 50.1 | 48.5 | ***-3.2%*** |
| **ES** ❸ | 4 014.2 | 4 411.0 | 4 713.3 | 4 279.2 | 4 411.7 | ***3.1%*** |
| **FI** | 716.4 | 822.7 | 818.0 | 794.3 | 811.8 | ***2.2%*** |
| **FR** ❶❸ | 10 462.4 | 10 820.2 | 11 052.8 | 11 108.5 | 11 825.1 | ***6.5%*** |
| **GB** ❶❷ | 15 872.1 | 14 104.1 | 11 976.9 | 12 358.3 | 13 505.9 | ***9.3%*** |
| **GR** ❶❸❹ | 991.5 | 1 144.2 | 1 175.5 | 1 041.0 | 852.4 | ***-18.1%*** |
| **HU** | 641.7 | 700.6 | 619.8 | 586.4 | 554.1 | ***-5.5%*** |
| **IE** | 469.5 | 584.8 | 576.7 | 452.1 | 429.0 | ***-5.1%*** |
| **IT** ❸ | 6 180.2 | 6 603.5 | 6 873.5 | 6 756.7 | 6 788.7 | ***0.5%*** |
| **LT** ❸ | 72.6 | 89.2 | 97.2 | 72.1 | 71.6 | ***-0.7%*** |
| **LU** ❷ | 678.2 | 726.9 | 721.5 | 636.5 | 711.1 | ***11.7%*** |
| **LV** | 64.3 | 74.4 | 74.0 | 53.5 | 52.7 | ***-1.5%*** |
| **MT** ❶ | 4.8 | 5.7 | 6.1 | 5.8 | 8.2 | ***41.4%*** |
| **NL** ❶❷❸ | 1 284.0 | 1 272.3 | 1 332.1 | 1 219.8 | 1 278.5 | ***4.8%*** |
| **PL** ❸ | 1 121.9 | 1 412.1 | 1 384.6 | 1 279.3 | 1 320.3 | ***3.2%*** |
| **PT** ❸ | 773.0 | 801.6 | 835.1 | 820.6 | 833.8 | ***1.6%*** |
| **RO** ❸ | 531.5 | 564.8 | 610.9 | 561.5 | 532.6 | ***-5.1%*** |
| **SE** | 1 497.9 | 1 468.3 | 1 302.6 | 1 362.2 | 1 677.5 | ***23.1%*** |
| **SI** | 158.3 | 161.8 | 168.8 | 166.7 | 173.8 | ***4.3%*** |
| **SK** ❶ | 146.1 | 183.2 | 215.9 | 165.3 | 158.0 | ***-4.4%*** |
| ***Total*** | ***64 871.0*** | ***65 549.2*** | ***64 263.4*** | ***63 120.9*** | ***65 743.8*** | ***4.2%*** |




❶ Data a minima as all private televisions are not included.
❷ Population of companies reviewed.
❸ 2010 provisory.
❹ The important decrease in 2010 is due to the merger of netmed hellas in Forthnet, that we do not include in the population.

Source: European Audiovisual Observatory

T.3.5

# Operating revenues of leading private radio companies in the European Union 2006-2010 EUR million.

| Rank | Company | Country | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|
| 1 | Global Radio Services Limited | GB | 252.1 | 209.8 | 189.0 | 218.1 | 213.2 |
| 2 | Sociedad Española De Radiodifusion SL | ES | 220.0 | 249.6 | 229.8 | 210.2 | 209.1 |
| 3 | Uniprex SA | ES | 99.7 | 102.4 | 95.9 | 88.7 | ~ |
| 4 | Radio Popular SA Cadena De Ondas Populares Españolas | ES | 97.1 | 106.5 | 98.1 | 84.2 | 84.5 |
| 5 | Société pour l'Edition radiophonique | FR | 80.3 | 76.0 | 71.5 | 79.7 | 75.7 |
| 6 | Europe 1 Télécompagnie | FR | 48.8 | 54.2 | 53.0 | 63.4 | 74.9 |
| 7 | Communicorp Group Limited | IE | 47.3 | 57.0 | 85.0 | 65.0 | 68.4 |
| 8 | N R J | FR | 77.4 | 63.2 | 74.6 | 60.3 | ~ |
| 9 | Radio 538 B.V. | NL | 0.0 | 19.2 | 65.2 | 54.1 | 55.1 |
| 10 | Antenne Bayern GmbH & Co. KG | DE | 54.0 | 55.0 | 55.0 | 55.0 | 55.0 |
| 11 | Radio/Tele FFH GmbH & Co. Betriebs-KG | DE | 40.0 | 50.0 | 50.0 | 45.0 | 50.0 |
| 12 | Talksport Limited | GB | 58.4 | 55.8 | 42.0 | 41.1 | 49.0 |
| 13 | Radio Dimensione Suono S.p.A. | IT | 37.1 | 43.6 | 45.7 | 42.4 | 45.1 |
| 14 | Sienna Holding B.V. | NL | 44.3 | 53.1 | 51.0 | 41.8 | 39.7 |
| 15 | Radio Nostalgie | FR | 47.5 | 41.6 | 36.0 | 27.6 | 31.8 |
| 16 | Cherie FM | FR | 32.5 | 26.9 | 27.6 | 23.5 | 29.5 |
| 17 | Kilohertz AB | SE | 25.9 | 25.8 | 24.8 | 23.8 | 29.1 |
| 18 | SBS Radio AB | SE | 20.2 | 22.6 | 20.9 | 21.3 | 28.2 |
| 19 | Société de développement de radiodiffusion | FR | 42.1 | 27.4 | 29.1 | 27.4 | 26.1 |
| 20 | Radio E Reti | IT | 50.9 | 54.3 | 56.4 | 43.7 | 25.7 |
| 21 | Euvia Travel GmbH | DE | 0.0 | 25.4 | 24.4 | 25.3 | 25.0 |
| 22 | Sté d'exploitation Radio Chic | FR | 29.7 | 27.4 | 24.8 | 23.0 | 24.9 |
| 23 | Vives Radio S.A. | ES | 11.8 | 18.0 | 19.2 | 15.3 | 23.6 |
| 24 | Radio ZET Sp. z o.o. | PL | 19.3 | 24.0 | 21.6 | ~ | ~ |
| 25 | Vortex | FR | 23.7 | 23.3 | 21.6 | 23.3 | 21.4 |
| 26 | Orion Media Holdings Limited | GB | 0.0 | 0.0 | 0.0 | 0.0 | 20.6 |
| 27 | Zet Premium Sp. z o.o. | PL | 1.4 | 1.6 | 1.3 | 24.6 | 19.5 |
| 28 | Radio Studio 105 SRL | IT | 17.9 | 18.2 | 18.5 | 18.2 | 19.5 |
| 29 | Performances | FR | 29.8 | 25.8 | 23.7 | 20.1 | 18.6 |
| 30 | Antena 3 De Radio, Sociedad Anonima | ES | 30.6 | 35.9 | 33.4 | 23.8 | 18.6 |
| 31 | Rheinland-Pfälzische Rundfunk GmbH & Co. KG | DE | 25.1 | 28.9 | 28.6 | 18.8 | 18.6 |
| 32 | Radio Renascença, Lda. | PT | 21.1 | 22.1 | 21.1 | 19.6 | 18.5 |
| 33 | Magic 105.4 Limited | GB | 26.4 | 23.9 | 12.9 | 18.4 | 18.4 |
| 34 | Radiotjänst i Kiruna AB | SE | 18.0 | 16.4 | 14.7 | 16.4 | 18.1 |
| 35 | Radiowe Doradztwo Reklamowe Sp. z o.o. | PL | 2.6 | 0.2 | ~ | 10.1 | 18.0 |
| 36 | Omroepvereniging Max | NL | 0.0 | 0.0 | 0.0 | 13.2 | 17.9 |
| 37 | Cobelfra | BE | 17.2 | 20.7 | 20.1 | 15.0 | 17.2 |
| 38 | Timl Radio Limited | GB | 32.4 | 32.6 | 23.0 | 16.6 | 16.9 |
| 39 | Europe 2 Entreprises | FR | 31.3 | 28.7 | 33.5 | 25.8 | 15.7 |
| 40 | Monradio SRL | IT | 10.5 | 14.6 | 19.4 | 16.1 | 15.6 |
| 41 | MTG Radio AB | SE | 15.9 | 16.5 | 14.4 | 14.1 | 15.4 |
| 42 | BCS Broadcast Sachsen GmbH & Co. KG | DE | 0.0 | 0.0 | 14.0 | 14.6 | 14.7 |
| 43 | ENERGY MEDIA GmbH | DE | 15.0 | 15.0 | 15.0 | 15.0 | ~ |
| 44 | Nuova Radio SPA | IT | 15.3 | 14.9 | 13.5 | 13.9 | 14.6 |
| 45 | Radiocat XXI SL | ES | 6.9 | 9.0 | 10.6 | 12.6 | 14.6 |
| 46 | Omroepbedrijf Limburg B.V. | NL | 18.9 | 19.1 | 14.3 | 17.7 | 14.6 |
| 47 | Bauer Digital Radio Limited | GB | 18.1 | 15.4 | 9.4 | 12.8 | 14.4 |
| 48 | RTL Radio Berlin GmbH | DE | 15.0 | 16.1 | 14.3 | ~ | ~ |
| 49 | Europe 2 Communication | FR | 16.0 | 16.8 | 17.8 | 13.7 | 14.2 |
| 50 | Radio Regenbogen Hörfunk In Baden GmbH & Co. KG | DE | 18.8 | 18.8 | 16.6 | 15.8 | 14.1 |

Source: European Audiovisual Observatory

T.3.6
G.3.3

# Consolidated revenues of the main European commercial TV groups 2008-2011

**EUR million**

| Company | Country | 2008 | 2009 | 2010 | 2011 | 2011/10 |
|---|---|---|---|---|---|---|
| British Sky Broadcasting Ltd ❶ | GB | 5 537 | 6 630 | 7 581 | 8 073 | 6.5% |
| RTL Group | LU | 5 774 | 5 410 | 5 532 | 5 765 | 4.2% |
| Vivendi (Groupe Canal Plus ) | FR | 4 481 | 4 553 | 4 712 | 4 857 | 3.1% |
| Gruppo Mediaset | IT | 4 199 | 3 883 | 4 293 | 4 250 | -1.0% |
| ProSiebenSat.1 Media AG | DE | 3 117 | 2 798 | 3 012 | 2 756 | -8.5% |
| continued operations ❷ | DE | – | – | 2 600 | 2 756 | 6.0% |
| Sky Italia ❸ | IT | 2 669 | 2 877 | 3 032 | 2 876 | -5.1% |
| Groupe TF1 | FR | 2 595 | 2 365 | 2 622 | 2 620 | -0.1% |
| ITV plc | GB | 2 125 | 2 112 | 2 418 | 2 557 | 5.7% |
| Modern Times Group | SE | 1 378 | 1 382 | 1 456 | 1 512 | 3.9% |
| continued operations ❹ | | | 1 205 | 1 456 | 1 512 | 3.9% |
| Prisa-Unitad Audiovisual (Canal+ Spain) | ES | 2 169 | 1 771 | 1 281 | 1 229 | -4.1% |
| Sky Deutschland AG | DE | 941 | 902 | 977 | 1 139 | 16.6% |
| Central European Media Enterprises | BM | 724 | 498 | 556 | 668 | 20.1% |
| TVN S.A. | PL | 461 | 578 | 627 | 443 | -29.3% |
| continued operations ❺ | | | | 486 | 443 | -8.7% |
| ***Total*** | | ***36 170*** | ***35 582*** | ***41 184*** | ***41 944*** | ***1.8%*** |
| ***continued operations*** | | | | ***37 545*** | ***38 744*** | ***3.2%*** |

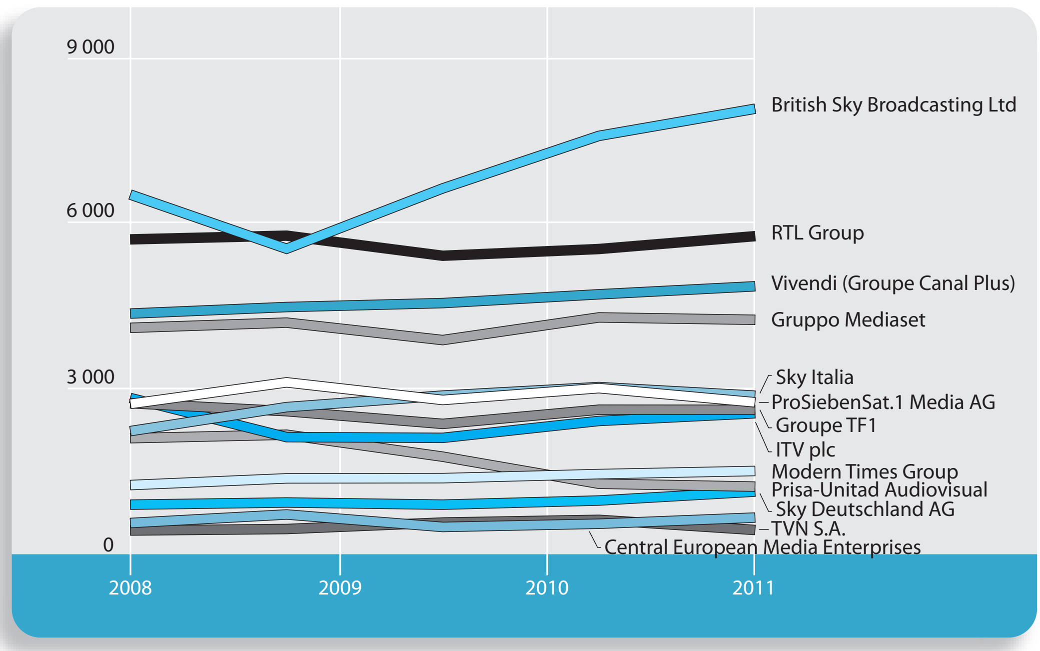
**In national currencies**

| Company | Currency | 2008 | 2009 | 2010 | 2011 | 2011/10 |
|---|---|---|---|---|---|---|
| British Sky Broadcasting Ltd (calendar year) | GBP | 5 095 | 5 631 | 6 325 | 6 765 | 7.0% |
| ITV ❷ | GBP | 2 029 | 1 879 | 2 064 | 2 140 | 3.7% |
| Modern Times Group | SEK | 13 166 | 14 173 | 13 101 | 13 473 | 2.8% |
| continued operations ❶ | SEK | | 12 427 | 13 101 | 13 473 | 2.8% |
| TVN S.A. | PLN | 1 900 | 2 391 | 2 491 | 1 960 | -21.3% |
| continued operations | PLN | | | 1 925 | 1 960 | 1.8% |
| Central European Media Enterprises | USD | 1 020 | 714 | 737 | 865 | 17.4% |

❶ Calendar year and not fiscal year.
❷ 2010 pro forma (est.) to take account of sales of Belgian and Dutch assets.
❸ As at 30 June.
❹ In 2010, Modern Times Group has deconsolidated its former retail subsidiary CDON.
❺ Following an agreement with Canal+ Group in December 2011 on the merger of the platform "n" (ITI Neovision Group) and Cyfra +, the revenues activities of ITI Neovision Group are presented as discontinued in TVN S.A. consolidated accounts.

Source: European Audiovisual Observatory

EUR million.



T.3.7

## The 50 leading European public radio-television companies 2007-2010

Unconsolidated operating revenues (EUR million, current rate).

| Rank | Company | Country | Activities | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| 1 | BBC Home Service | GB | TV+RAD | 4 288.8 | 3 866.7 | 4 037.5 | 4 231.1 | 4,8% |
| 2 | France Télévisions (cons.) 1 | FR | TV | 2 704.0 | 2 579.3 | 3 118.1 | 3 256.4 | 4,4% |
| 3 | RAI | IT | TV+RAD | 3 002.1 | 3 057.7 | 3 035.7 | 2 886.1 | -4,9% |
| 4 | ZDF | DE | TV | 1 927.2 | 1 922.4 | 2 065.1 | 1 965.9 | -4,8% |
| 5 | WDR - Westdeutscher Rundfunk | DE | TV+RAD | 1 311.4 | 1 293.3 | 1 310.7 | 1 333.7 | 1,8% |
| 6 | SRG-SSR idée suisse (cons.) | CH | TV+RAD | 983.3 | 1 098.5 | 1 122.1 | 1 323.0 | 17,9% |
| 7 | SWR - Südwestrundfunk | DE | TV+RAD | 1 096.1 | 1 098.8 | 1 122.1 | 1 132.1 | 0,9% |
| 8 | Corporacion de Radio y Television Española 2 | ES | TV+RAD | 1 183.8 | 1 143.0 | 1 143.7 | 1 126.4 | -1,5% |
| p.m. | Sociedad Mercantil Estatal Television Española S.A. | ES | TV | 1 013.8 | 981.8 | 997.7 | – | – |
| 9 | NDR - Norddeutscher Rundfunk | DE | TV+RAD | 1 042.0 | 1 049.8 | 1 060.4 | 1 081.3 | 2,0% |
| 10 | BR - Bayerischer Rundfunk | DE | TV+RAD | 955.2 | 928.4 | 978.7 | 974.7 | -0,4% |
| 11 | ORF | AT | TV+RAD | 952.9 | 943.0 | 892.7 | 948.9 | 6,3% |
| 12 | NPO | NL | TV+RAD | 842.6 | 821.5 | 829.2 | 857.2 | 3,4% |
| 13 | Channel 4 | GB | TV | 973.5 | 700.5 | 646.5 | 751.7 | 16,3% |
| 14 | MDR - Mitteldeutscher Rundfunk | DE | TV+RAD | 622.1 | 630.1 | 639.9 | 665.5 | 4,0% |
| 15 | NRK | NO | TV+RAD | 496.1 | 439.3 | 540.4 | 609.5 | 12,8% |
| 16 | Pervyi Kanal (Channel One) | RU | TV | 574.6 | 608.2 | 504.1 | 601.2 | 19,3% |
| 17 | Danmarks Radio | DK | TV+RAD | 484.4 | 499.5 | 502.9 | 514.8 | 2,4% |
| 18 | RTR | RU | TV+RAD | 615.3 | 599.2 | 426.3 | 495.4 | 16,2% |
| 19 | HR - Hessischer Rundfunk | DE | TV+RAD | 458.5 | 451.6 | 458.5 | 475.3 | 3,7% |
| 20 | Sveriges Television AB | SE | TV | 426.7 | 363.5 | 371 | 463.5 | 24,9% |
| 21 | Telewizja Polska | PL | TV | 588.8 | 536.2 | 431.1 | 453.5 | 5,2% |
| 22 | VRT | BE | TV+RAD | 453.3 | 449.2 | 450.5 | 448.1 | -0,5% |
| 23 | Yleisradio Oy | FI | TV+RAD | 409.1 | 397.5 | 411.2 | 420.0 | 2,1% |
| 24 | RBB - Rundfunk Berlin Brandenburg | DE | TV+RAD | 393.0 | 392.3 | 399.1 | 403.6 | 1,1% |
| 25 | Televisió de Catalunya S.A. | ES | TV | 148.5 | 382.3 | 385.3 | 392.8 | 1,9% |
| 26 | RTE (cons.) | IE | TV+RAD | 441.2 | 440.8 | 374.9 | 371.7 | -0,9% |
| 27 | TRT | TR | TV+RAD | 337.6 | 350.4 | 359.7 | ~ | ~ |
| 28 | 4 Ventures Ltd | GB | TV | 310.4 | 262.2 | 295.7 | 351.1 | 18,7% |
| 29 | ERT 3 | GR | TV+RAD | 540.1 | 374.0 | 353.7 | 340.8 | -3,6% |
| 30 | ARTE France (S.E.P.T.) | FR | TV | 301.5 | 316.2 | 337.5 | 340.5 | 0,9% |
| 31 | RTBF | BE | TV+RAD | 311.3 | 317.2 | 314.3 | 312.5 | -0,6% |
| 32 | Rádio e Televisão de Portugal | PT | TV+RAD | 314.9 | 298.3 | 307.5 | 308.6 | 0,4% |
| 33 | Deutsche Welle | DE | TV+RAD | 289.6 | 299.5 | 300.8 | 301.2 | 0,1% |
| 34 | Ceska Televisie | CZ | TV | 225.1 | 242.9 | 253.8 | 268.0 | 5,6% |
| 35 | Audiovisuel extérieur de la France | FR | TV+RAD | – | 249.5 | 256.7 | 262.4 | 2,2% |
| p.m. | France 24 | FR | TV | 91.6 | 96.8 | ~ | 109.5 | ~ |
| 36 | Hrvatska Radiotelevizija | HR | TV+RAD | 196.4 | 214.4 | 198.3 | 196.2 | -1,1% |
| 37 | TV2/Danmark A/S | DK | TV | 288.6 | 275.1 | 170.1 | 186.7 | 9,8% |
| 38 | Canal Sur Televisión S.A. | ES | TV | 56.7 | 188.5 | 186.1 | 179.9 | -3,3% |
| 39 | Euskal Telebista Television Vasca | ES | TV | 124.6 | 130.8 | 133.8 | 134.9 | 0,8% |
| 40 | TVR - Televizune Romania | RO | TV | 143.7 | 143.5 | 134.8 | 130.7 | -3,0% |
| 41 | RTVSLO | SI | TV+RAD | 114.5 | 114.2 | 122.7 | 125.3 | 2,1% |
| 42 | S4C | GB | TV | 136.7 | 107.6 | 118 | 122.3 | 3,6% |
| 43 | TV5 Monde | FR | TV | 87.8 | 93.9 | 100.4 | 103.6 | 3,2% |
| 44 | BBC World News Ltd | GB | TV | 64.8 | 69.5 | 70.7 | 81.8 | 15,7% |
| 45 | Magyar Televisio - MTV | HU | TV | 121.5 | 127.2 | 120.1 | 79.4 | -33,9% |
| 46 | SR | DE | TV+RAD | 85.0 | 87.3 | 78.9 | 78.4 | -0,6% |
| 47 | STV-Slovenska Televizija | SK | TV | 66.1 | 76.4 | 71 | 72.1 | 1.5% |
| 48 | TV2 Zulu A/S | DK | TV | 51 | 52.8 | 68.7 | 69.8 | 1,6% |
| 49 | Television Autonomica de Castilla-La Mancha S.A. | ES | TV | 56.6 | 62.4 | 59.4 | 54.0 | -9,1% |
| 50 | RB - Radio Bremen | DE | TV+RAD | 66.7 | 47.8 | 48.2 | 48.9 | 1,5% |

1 The reform of the public TV sector in 2008 included the merger of France 2, France 3, France 5 and Réseau France Outremer.

2 Includes Radio Nacional de España.

3 2007 over 18 months.

Source: European Audiovisual Observatory

T.3.8
G.3.4

# Financial situation of public radio-television companies in the European Union (EUR 27) 2006-2010

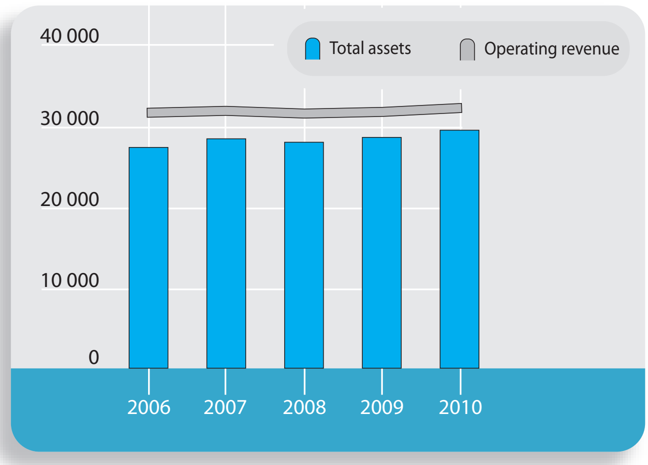
Based on unconsolidated accounts. Includes radio-only organisations. Includes companies broadcasting thematic and international services. Bulgaria, Cyprus and Lithuania are not included.

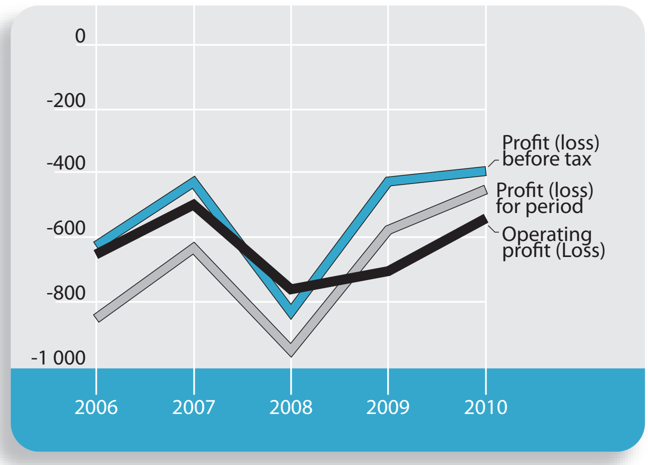
| In units | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Number of companies included (1) | 100 | 99 | 96 | 96 | 93 |
| **EUR million** | **2006** | **2007** | **2008** | **2009** | **2010** |
| Total assets | 27 429 | 28 501 | 28 073 | 28 675 | 29 567 |
| Operating revenue | 31 775 | 32 013 | 31 676 | 31 884 | 32 368 |
| **EUR million** | **2006** | **2007** | **2008** | **2009** | **2010** |
| Operating profit (loss) | -653 | -499 | -761 | -705 | -541 |
| Profit (loss) before tax | -626 | -429 | -831 | -427 | -395 |
| Profit (loss) for period | -852 | -634 | -950 | -577 | -452 |
| **In %** | **2006** | **2007** | **2008** | **2009** | **2010** |
| Solvency | 30.9 | 32.2 | 30.6 | 31.6 | 33.8 |
| **In %** | **2006** | **2007** | **2008** | **2009** | **2010** |
| Operating margin | -2.1 | -1.6 | -2.4 | -2.2 | -1.7 |
| Return on shareholders' funds | -7.4 | -4.7 | -9.7 | -4.7 | -4.0 |
| Profit margin | -2.0 | -1.3 | -2.6 | -1.3 | -1.2 |
| Return on total assets | -2.3 | -1.5 | -3.0 | -1.5 | -1.3 |

(1) Population reviewed since previous edition. Dutch NPO counted as one company. France Télévisions counted as one organisation from 2008 onwards.

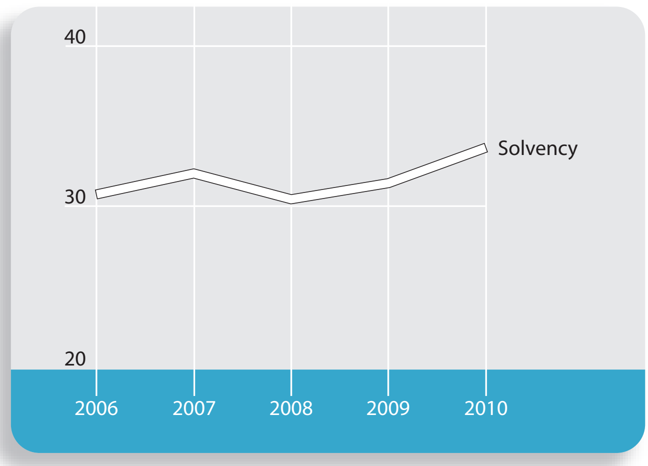
Source: European Audiovisual Observatory

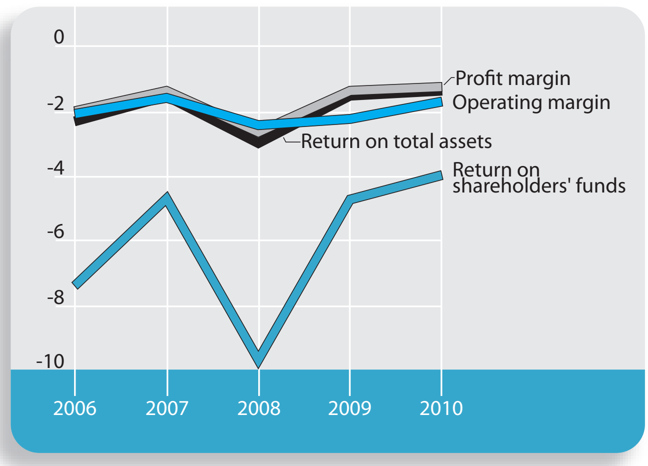
EUR million.




In %.



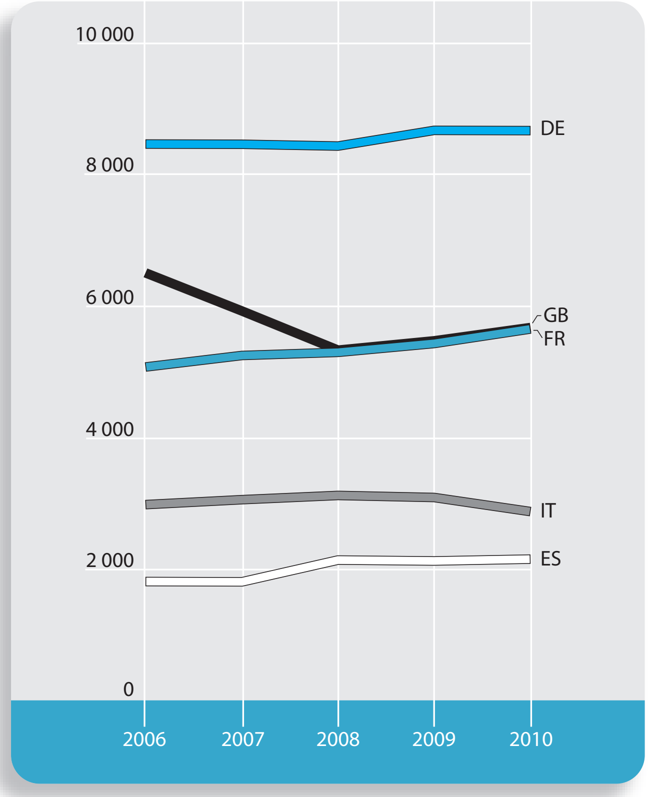



T.3.9
G.3.5

# Financial performance of public radio-television companies in the European Union (EUR 27) 2008-2010

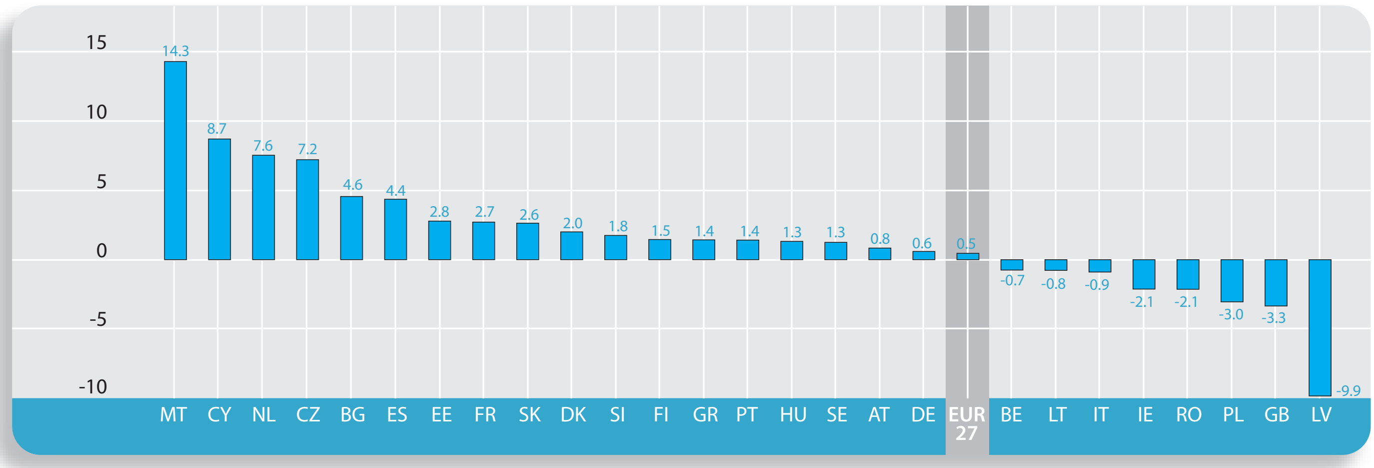
**Operating revenues (calculated on consolidated statements), in EUR million 2008-2010**

| Country | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|
| AT | 943.0 | 892.7 | 948.9 | 6.3% |
| BE | 772.4 | 771.2 | 766.9 | -0.6% |
| BG *est.* | 74.6 | 69.3 | 66.6 | -3.9% |
| CY | 43.3 | 35.8 | 45.0 | 25.7% |
| CZ | 321.0 | 338.3 | 357.1 | 5.6% |
| DE | 8 434.4 | 8 672.7 | 8 669.0 | 0.0% |
| DK | 825.0 | 764.9 | 794.2 | 3.8% |
| EE | 32.1 | 29.7 | 28.4 | -4.4% |
| ES *est.* 1 | 2 149.2 | 2 135.7 | 2 163.5 | 1.3% |
| FI | 397.5 | 411.2 | 420.0 | 2.1% |
| FR 2 | 5 302.8 | 5 436.7 | 5 656.4 | 4.0% |
| GB | 5 336.9 | 5 478.2 | 5 679.2 | 3.7% |
| GR | 374.0 | 353.7 | 340.8 | -3.6% |
| HU | 220.6 | 211.3 | 171.6 | -18.8% |
| IE | 440.8 | 374.9 | 371.7 | -0.9% |
| IT | 3 130.3 | 3 099.3 | 2 886.1 | -6.9% |
| LT | 26.6 | 19.3 | 19.1 | -1.0% |
| LV | 32.5 | 25.8 | 17.7 | -31.4% |
| MT | 6.1 | 5.8 | 8.2 | 41.4% |
| NL | 871.2 | 880.7 | 909.9 | 3.3% |
| PL | 597.4 | 491.4 | 515.8 | 5.0% |
| PT | 298.3 | 305.8 | 308.6 | 0.9% |
| RO | 236.4 | 229.4 | 223.8 | -2.4% |
| SE | 593.9 | 624.1 | 777.1 | 24.5% |
| SI | 114.2 | 122.7 | 125.3 | 2.1% |
| SK | 101.1 | 103.2 | 102.0 | -1.2% |
| *EUR 27 est.* | *31 676* | *31 884* | *32 368* | *1.5%* |




1 Grants in capital to autonomous broadcasters not included.
2 Historical series reviewed: individual companies in 2006 ; consolidated accounts of France Télévisions in 2007-2010.

**Average annual rate of growth of operating revenues, in % 2006-2010**




Source: European Audiovisual Observatory

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9

T.3.10

## Public radio companies in Europe

### 2006-2010 Unconsolidated operating revenues (EUR million, current rate).

| Company | Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|
| Radio France | FR | 569.6 | 583.0 | 594.4 | 609.7 | 631.9 | 3.6% |
| BBC World Service | GB | 399.2 | 359.9 | 319.5 | 336.5 | 346.7 | 3.0% |
| Sveriges Radio AB | SE | 251.0 | 235.0 | 201.5 | 221.9 | 269.2 | 21.3% |
| Deutschlandradio | DE | 196.6 | 197.0 | 197.7 | 210.4 | 208.2 | -1.0% |
| Radio Romania | RO | 95.6 | 91.4 | 92.9 | 94.5 | 93.2 | -1.4% |
| Cesky Rozhlas | CZ | 71.3 | 79.0 | 78.1 | 84.6 | 88.0 | 4.0% |
| Polskie Radio S.A. | PL | 79.7 | 79.6 | 61.2 | 60.3 | 67.8 | 12.4% |
| Magyar Radio RT. | HU | 63.5 | 62.0 | 59.0 | 55.9 | 54.3 | -2.9% |
| Catalunya Radio | ES | 14.5 | 18.1 | 49.2 | 52.5 | 49.7 | -5.3% |
| Canal Sur Radio S.A. | ES | 4.0 | 5.1 | 29.9 | 33.0 | 32.7 | -0.9% |
| Slovensky Rozhlas | SK | 27.5 | 29.1 | 24.7 | 32.2 | 29.9 | -7.1% |
| Bulgarian National Radio | BG | ~ | ~ | 27.8 | 27.1 | 67.8 | 12.4% |
| Eusko Irratia Radiodiffusion Vasca | ES | 17.0 | 18.2 | 19.3 | 19.5 | 19.7 | 1.0% |
| Gasteiz Irratia Radio Vitoria S.A. [1] | ES | 3.6 | 3.8 | 4.0 | 4.1 | 3.9 | -4.3% |
| Radio Autonomica de Castilla La Mancha S.A. | ES | 2.2 | 2.2 | 2.1 | 2.0 | 2.4 | 17.8% |
| Latvijas Radio | LV | 7.7 | 8.8 | 9.3 | 8.5 | 2.2 | -74.1% |
| Radio Autonomia Valenciana SA | ES | 2.1 | 1.8 | 1.5 | 1.4 | 1.2 | -14.9% |
| Radio Autonomia Madrid SA | ES | 0.7 | 0.7 | 0.7 | 0.4 | 1.1 | 175.0% |
| Radio Autonomica de Aragon SA | ES | 0.1 | 0.3 | 0.7 | 0.6 | 0.3 | -50.0% |
| Radio del Principado de Asturias | ES | – | – | 0.1 | 0.1 | 0.2 | 163.3% |
| Sociedad Publica De Radiodifusion Extremena S.A. | ES | 2.4 | 3.1 | 1.8 | 1.1 | 0.1 | -91.9% |
| Radio Publica de Canarias S.A. | ES | – | – | 0.1 | 0.1 | 0.0 | -91.3% |
| TV2 radio A/S | DK | – | 2.9 | 0.8 | 0.0 | 0.0 | -100.0% |

[1] Acquired in December 2010 by Ente Público de Derecho Privado Euskal Irrati Telebista/Radiotelevisión Vasca.

Source: European Audiovisual Observatory

T.3.11

## Television licence fee

### 2007-2011 VAT included when applicable.

| Country | Currency | 2007 | 2008 | 2009 | 2010 | 2011 |
|---|---|---|---|---|---|---|
| **AT** (Wien) | EUR | 255.4 | 276.7 | 276.7 | 277.0 | 276.7 |
| **BE** (Walloon Region only) | EUR | ~ | ~ | 100.0 | 100.0 | ~ |
| **CH** | CHF | 281.4 | 292.8 | 292.8 | 292.8 | 293.3 |
| | EUR | 177.2 | 182.1 | 192.0 | 196.4 | 197.4 |
| **CZ** | CZK | 1 440.0 | 1 620.0 | 1 620.0 | ~ | ~ |
| | EUR | 51.5 | 61.0 | 60.9 | ~ | ~ |
| **DE** | EUR | 204.4 | 204.4 | 215.8 | 215.8 | 215.8 |
| **DK** | DKK | 2 150.0 | 2 190.0 | 2 220.0 | 2 260.0 | 2 300.0 |
| | EUR | 288.4 | 293.7 | 298.0 | 303.7 | 309.1 |
| **FI** | EUR | 208.2 | 224.0 | 224.3 | 231.1 | 231.1 |
| **FR** | EUR | 116.0 | 116.0 | 118.0 | 121.0 | 123.0 |
| **GB** | GBP | 135.5 | 139.5 | 142.5 | 145.5 | 145.5 |
| | EUR | 201.2 | 189.5 | 167.5 | 163.4 | 171.8 |
| **HR** | HRK | 822.0 | 864.0 | 926.0 | ~ | ~ |
| | EUR | 111.6 | 117.5 | 125.0 | ~ | ~ |
| **IE** | EUR | 158.0 | 160.0 | 160.0 | 160.0 | 160.0 |
| **IT** | EUR | 104.0 | 106.0 | 107.5 | 110.5 | 110.5 |
| **NO** | NOK | 2 103.8 | 2 218.9 | 2 334.0 | 2 405.8 | 2 477.5 |
| | EUR | 257.7 | 279.0 | 237.8 | 289.5 | 316.9 |
| **PL** | PLZ | 186.7 | 186.7 | 186.7 | ~ | 188.3 |
| | EUR | 47.7 | 54.8 | 47.4 | ~ | 47.4 |
| **PT** | EUR | 20.0 | 21.0 | 21.0 | 21.0 | 27.0 |
| **RO** | ROL | 48.0 | 48.0 | 48.0 | 48.0 | 48.0 |
| | EUR | 14.2 | 13.4 | 12.1 | 11.4 | 11.2 |
| **SE** | SEK | 1 996.0 | 2 032.0 | 2 076.0 | 2 076.0 | 2 076.0 |
| | EUR | 220.2 | 215.5 | 189.7 | 202.2 | 231.0 |
| **SI** | EUR | 132.0 | 132.0 | 144.0 | ~ | ~ |
| **SK** | SKK | 50.0 | 56.0 | 56.0 | ~ | ~ |

Source: European Audiovisual Observatory

T.3.12

## The 40 leading European private television companies financed by advertising 2006-2010

Unconsolidated operating revenues (EUR million, current rate).

| Rank | Company | Country | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|---|
| 1 | Reti Televisive Italiane R.T.I. (R.T.I.) | **IT** | 2 341.9 | 2 577.0 | 2 724.7 | 2 707.5 | 2 936.5 | ***8.5%*** |
| 2 | TF1 | **FR** | 1 798.0 | 1 824.0 | 1 759.0 | 1 587.0 | 1 660.0 | ***4.6%*** |
| 3 | RTL Television GmbH | **DE** | 1 705.9 | 1 693.0 | 1 703.6 | 1 415.9 | 1 562.2 | ***10.3%*** |
| 4 | ITV Broadcasting Ltd (1) | **GB** | 210.2 | 1 660.3 | 1 293.1 | 1 227.0 | 1 470.5 | ***19.8%*** |
| *p.m.* | Granada Television Ltd (1) | **GB** | 453.4 | – | – | – | – | – |
| *p.m.* | London Weekend Television Ltd (1) | **GB** | 517.4 | – | – | – | – | – |
| *p.m.* | ITV Central Ltd (1) | **GB** | 368.2 | 74.4 | – | – | – | – |
| *p.m.* | Carlton Broadcasting Ltd (1) | **GB** | 334.8 | – | – | – | – | – |
| *p.m.* | Yorkshire Television Ltd (1) | **GB** | 324.4 | – | – | – | – | – |
| *p.m.* | ITV Meridian (1) | **GB** | 253.9 | 61.1 | – | – | – | – |
| *p.m.* | ITV Wales & West Ltd (1) | **GB** | 134.9 | 29.6 | – | – | – | – |
| 5 | ITV Network Ltd | **GB** | 1 673.5 | 1 461.5 | 1 092.2 | 966.0 | 1 053.6 | ***9.1%*** |
| 6 | Métropole Télévision (M6) | **FR** | 741.0 | 770.0 | 758.0 | 730.0 | 809.0 | ***10.8%*** |
| 7 | Sat.1 Satellitenfernsehen GmbH | **DE** | 885.6 | 841.1 | 742.9 | 740.1 | ~ | ~ |
| 8 | Gestevision Telecinco S.A. | **ES** | 846.2 | 913.2 | 822.3 | 535.6 | 692.3 | ***29.3%*** |
| 9 | CLT-UFA S.A. (2) | **LU** | 638.6 | 687.4 | 681.9 | 602.8 | 680.4 | ***12.9%*** |
| *p.m.* | RTL Nederland B.V. (2) | **NL** | 233.2 | 258.5 | 279.2 | 228.9 | 267.1 | ***16.7%*** |
| *p.m.* | RTL Belgium (2) | **BE** | 124.0 | 143.4 | 145.3 | 140.4 | 161.8 | ***15.2%*** |
| 10 | ProSieben Television GmbH | **DE** | 743.2 | 777.1 | 730.6 | 687.1 | ~ | ~ |
| 11 | Antena 3 de Televisión S.A. | **ES** | 869.8 | 878.0 | 722.3 | 604.4 | 657.3 | ***8.8%*** |
| 12 | Viasat Broadcasting UK Ltd | **GB** | 364.1 | 370.3 | 370.0 | 409.9 | 580.4 | ***41.6%*** |
| 13 | Vox Television GmbH | **DE** | 400.0 | 450.0 | 492.3 | 439.9 | 514.7 | ***17.0%*** |
| 14 | TVN SA. | **PL** | 260.6 | 383.6 | 404.7 | 418.7 | 421.2 | ***0.6%*** |
| 15 | Telekompaniya NTV | **RU** | 311.3 | 380.7 | 427.0 | 272.4 | 397.7 | ***46.0%*** |
| 16 | CET 21 (Nova TV) | **CZ** | 309.2 | 437.3 | ~ | 441.9 | 379.8 | ***-14.1%*** |
| 17 | Sociedad general de Television Cuatro S.A. | **ES** | – | – | – | – | 359.0 | – |
| *p.m.* | Sogecable (Cuatro) (3) | **ES** | 185.4 | 287.5 | 414.2 | 286.6 | – | – |
| 18 | Channel 5 Broadcasting Ltd | **GB** | 465.9 | 459.2 | 360.8 | 305.9 | 339.5 | ***11.0%*** |
| 19 | TV4 AB | **SE** | 286.8 | 281.4 | 255.9 | 240.4 | 324.2 | ***34.9%*** |
| 20 | TV2 AS | **NO** | 248.4 | 274.6 | 248.0 | 255.7 | 306.0 | ***19.7%*** |
| 21 | Vlaams Media Maatschappij (VTM) | **BE** | 259.2 | 271.9 | 281.4 | 275.8 | 303.9 | ***10.2%*** |
| 22 | Kabel 1 Fernsehen | **DE** | 256.5 | 283.1 | 249.9 | 289.2 | ~ | ~ |
| 23 | RTL 2 Fernsehen GmbH | **DE** | 248.5 | 244.6 | 289.1 | 265.0 | 282.9 | ***6.8%*** |
| 24 | Telewizja Polsat | **PL** | 188.2 | 248.3 | 244.6 | 214.3 | 235.7 | ***10.0%*** |
| 25 | MTV Oy | **FI** | 176.5 | 246.9 | 231.7 | 182.7 | 214.0 | ***17.1%*** |
| 26 | SBS Broadcasting B.V. | **NL** | 179.5 | 105.1 | 200.0 | 196.6 | 198.3 | ***0.9%*** |
| 27 | Gestora de Inversiones Audiovisuales La Sexta S.A. | **ES** | 76.1 | 110.4 | 151.3 | 178.9 | ~ | ~ |
| 28 | Sociedade independente de communicaçao (SIC) | **PT** | 134.1 | 135.6 | 143.5 | 151.1 | 170.3 | ***12.7%*** |
| 29 | UTV Media PLC | **GB** | 169.4 | 156.3 | 126.3 | 126.3 | 141.1 | ***11.7%*** |
| 30 | Eleftheri Tileorassi S.A. | **GR** | 87.2 | 118.6 | 147.0 | 135.5 | ~ | ~ |
| 31 | TVI - Televisão Independente | **PT** | 155.7 | 159.2 | 166.3 | 155.7 | 135.0 | ***-13.3%*** |
| 32 | Antenna Group (cons.) | **GR** | 188.6 | 172.7 | 157.7 | 134.7 | ~ | ~ |
| 33 | Kanal 5 AB | **SE** | 114.2 | 120 | 107.7 | 103.3 | 129.3 | ***25.2%*** |
| 34 | Sanoma Television Oy | **FI** | 128.9 | 137.5 | 142.4 | 145.8 | 124.9 | ***-14.3%*** |
| 35 | Pro TV S.A. | **RO** | 123.3 | 145.3 | 173.9 | 126.5 | 119.0 | ***-5.9%*** |
| 36 | Aksept (Ren TV) | **RU** | 92.9 | 114.1 | 117.2 | 86.5 | 118.4 | ***36.9%*** |
| 37 | Teletypos S.A. | **GR** | 145.4 | 173.5 | 168.1 | 139.2 | 112.1 | ***-19.5%*** |
| 38 | Magyar RTL Televizio | **HU** | 129 | 134.2 | 140.3 | 115.4 | 105.5 | ***-8.6%*** |
| 39 | MAC TV | **SK** | ~ | ~ | 100.8 | ~ | ~ | ~ |
| 40 | TVDanmark A/S | **DK** | ~ | 37.1 | 79.5 | 84.0 | 97.0 | ***15.5%*** |

(1) The various regional ITV companies were merged in ITV Broadcasting as at 1.1.2007 or 1.4.2007.

(2) Since 2005, the broadcasting activities of the channels RTL4, RTL5 and RTL7 targetting the Netherlands and of the channels RTL-TVi, RTL Club and Plug targetting the French Community of Belgium have been under the responsibility of the CLT-UFA S.A., a company of the RTL Group that consolidates various activities. RTL Nederland B.V. and RTL Belgium are providing some of the activities related to the channels as well as radio services.

(3) In 2010 the channel Cuatro (Sociedad General Cuatro) was taken over by the Mediaset Group. 2010 on 11 months.

Source: European Audiovisual Observatory

T.3.13
G.3.6

# Financial situation of private television companies financed by advertising in the European Union (EUR 27) 2006-2010

| In units | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| Number of companies included [1] | 99 | 93 | 86 | 85 | 84 |

| EUR million | 2006 | 2007 | 2008 | 2009 | prov. 2010 |
|---|---|---|---|---|---|
| Total assets | 36 465 | 32 392 | 33 322 | 33 682 | 37 844 |
| Operating revenue | 21 598 | 21 655 | 20 711 | 18 864 | 20 342 |

| EUR million | 2006 | 2007 | 2008 | 2009 | prov. 2010 |
|---|---|---|---|---|---|
| Operating profit (loss) | 2 203 | 1 238 | 1 484 | 1 545 | 2 393 |
| Profit (loss) before tax | 2 713 | 3 777 | 2 615 | 2 073 | 2 905 |
| Profit (loss) for period | 1 885 | 2 589 | 1 693 | 1 039 | 1 461 |

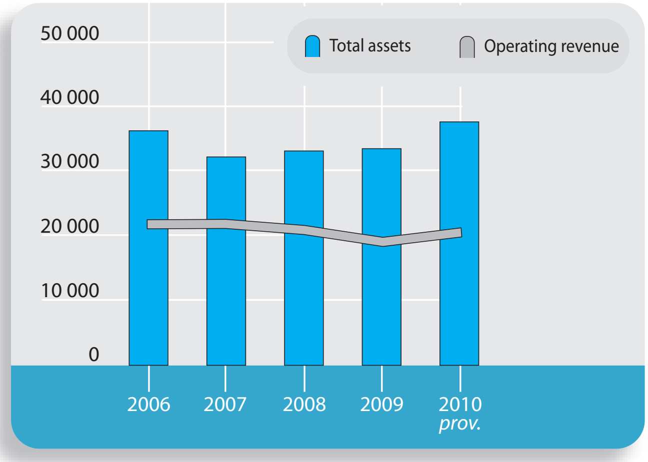
| In % | 2006 | 2007 | 2008 | 2009 | prov. 2010 |
|---|---|---|---|---|---|
| Solvency | 50.5 | 48.3 | 45.6 | 43.3 | 44.4 |

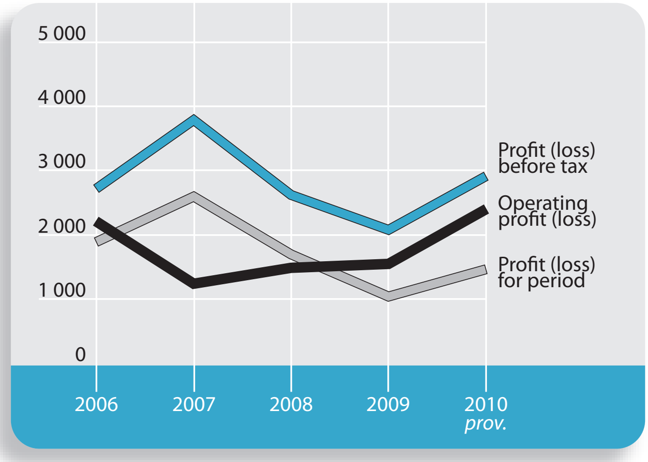
| In % | 2006 | 2007 | 2008 | 2009 | prov. 2010 |
|---|---|---|---|---|---|
| Operating margin | 10.2 | 5.7 | 7.2 | 8.2 | 11.8 |
| Return on shareholders' funds | 14.7 | 23.4 | 17.2 | 13.8 | 17.2 |
| Profit margin | 12.6 | 17.4 | 12.6 | 11.0 | 14.3 |
| Return on total assets | 7.4 | 11.7 | 7.8 | 6.2 | 7.7 |

[1] Regional and local television companies are not included.
For UK: Unconsolidated statement of individual companies of the ITV group are taken into consideration rather than ITV PLC.

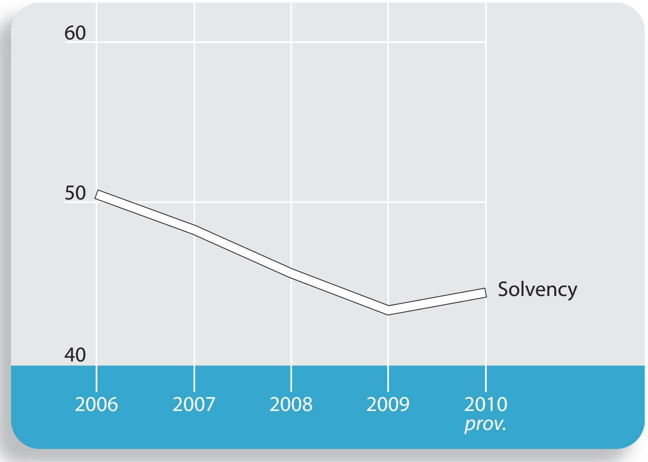
Source: European Audiovisual Observatory

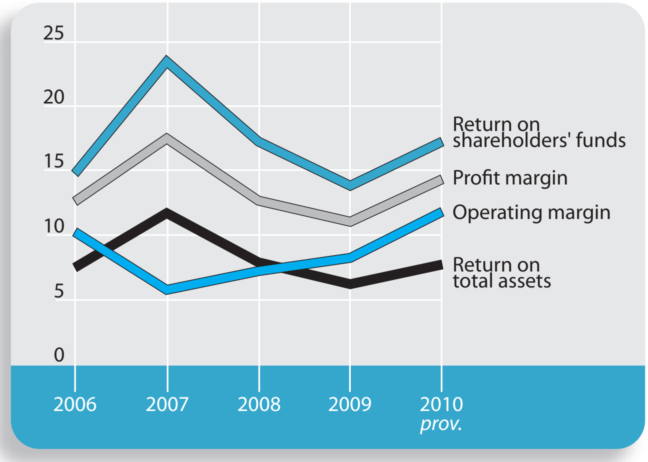
EUR million.




In %.



T.3.14
G.3.7

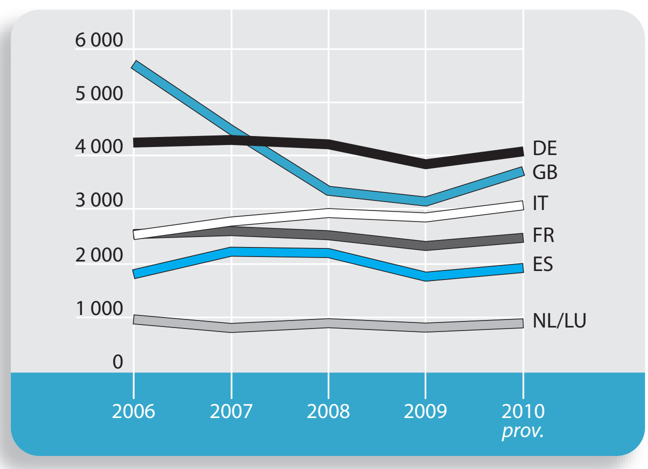
# Financial performance of private television companies financed by advertising in the European Union (EUR 27) 2006-2010

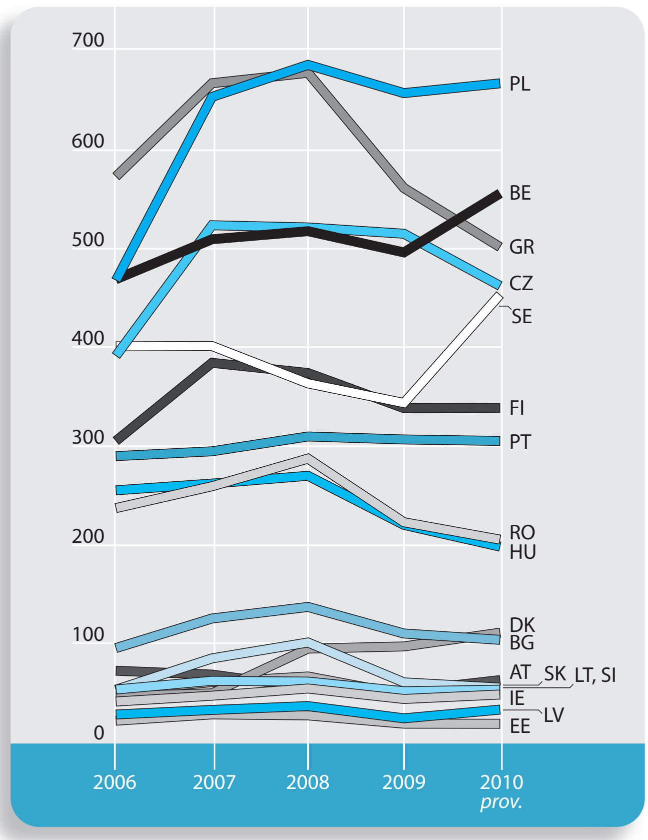
**Operating revenues, in EUR million 2006-2010**

| Country | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 | *prov.* 2010/09 |
|---|---|---|---|---|---|---|
| **AT** | 72.6 | 68.7 | 55.5 | 52.1 | 63.1 | ***21.1%*** |
| **BE** | 469.1 | 509.5 | 517.7 | 496.2 | 555.8 | ***12.0%*** |
| **BG** | 95.6 | 125.5 | 137.2 | 110.3 | 103.9 | ***-5.8%*** |
| **CZ** | 391.6 | 523.7 | 521.5 | 515.1 | 462.4 | ***-10.2%*** |
| **DE** *prov.* | 4 239.9 | 4 288.8 | 4 208.4 | 3 837.2 | 4 076.1 | ***6.2%*** |
| **DK** | 46.9 | 49.7 | 95.0 | 97.2 | 111.1 | ***14.3%*** |
| **EE** | 22.0 | 28.4 | 27.4 | 19.0 | 18.9 | ***-0.5%*** |
| **ES** *est.* | 1 792.0 | 2 211.4 | 2 185.8 | 1 746.8 | 1 908.1 | ***9.2%*** |
| **FI** | 305.4 | 384.4 | 374.1 | 338.5 | 338.9 | ***0.1%*** |
| **FR** | 2 539.0 | 2 594.0 | 2 517.0 | 2 317.0 | 2469 | ***6.6%*** |
| **GB** - UK market | 5 219.5 | 4 060.5 | 2 960.2 | 2 711.1 | 3 104.7 | ***14.5%*** |
| **GB** - Nordic market | 479.0 | 418.5 | 383.9 | 433.1 | 606.2 | ***40.0%*** |
| **GR** | 573.1 | 667.5 | 678.1 | 561.4 | 501.7 | ***-10.6%*** |
| **HU** | 255.3 | 262.1 | 270.0 | 220.3 | 198.3 | ***-10.0%*** |
| **IE** | 53.6 | 62.4 | 61.6 | 51.8 | 53.4 | ***3.1%*** |
| **IT** | 2 519.9 | 2 771.7 | 2 929.5 | 2 848.4 | 3 073.9 | ***7.9%*** |
| **LT** | 51.8 | 61.1 | 66.8 | 48.5 | 49.1 | ***1.2%*** |
| **LV** | 28.3 | 32.9 | 36.8 | 24.4 | 33.2 | ***36.1%*** |
| **NL/LU** *est.* | 952.2 | 792.4 | 881.9 | 799.4 | 878.7 | ***9.9%*** |
| **PL** | 468.1 | 653.7 | 686.1 | 657.5 | 667.4 | ***1.5%*** |
| **PT** | 289.9 | 294.8 | 309.8 | 306.8 | 305.3 | ***-0.5%*** |
| **RO** | 237.3 | 259.4 | 287.4 | 223.0 | 205.4 | ***-7.9%*** |
| **SE** | 401.1 | 401.4 | 363.6 | 343.7 | 453.2 | ***31.9%*** |
| **SI** | 41.4 | 47.3 | 54.6 | 44.0 | 48.5 | ***10.2%*** |
| **SK** | 53.4 | 85.1 | 101.2 | 60.8 | 55.5 | ***-8.7%*** |
| | | | | | | |
| ***EUR 27** est.* | ***21 598.0*** | ***21 655.0*** | ***20 711.0*** | ***18 863.6*** | ***20 341.8*** | ***7.8%*** |
| ***Growth*** | ***3.0%*** | ***0.3%*** | ***-4.4%*** | ***-8.9%*** | ***7.8%*** | |

Source: European Audiovisual Observatory

EUR million.

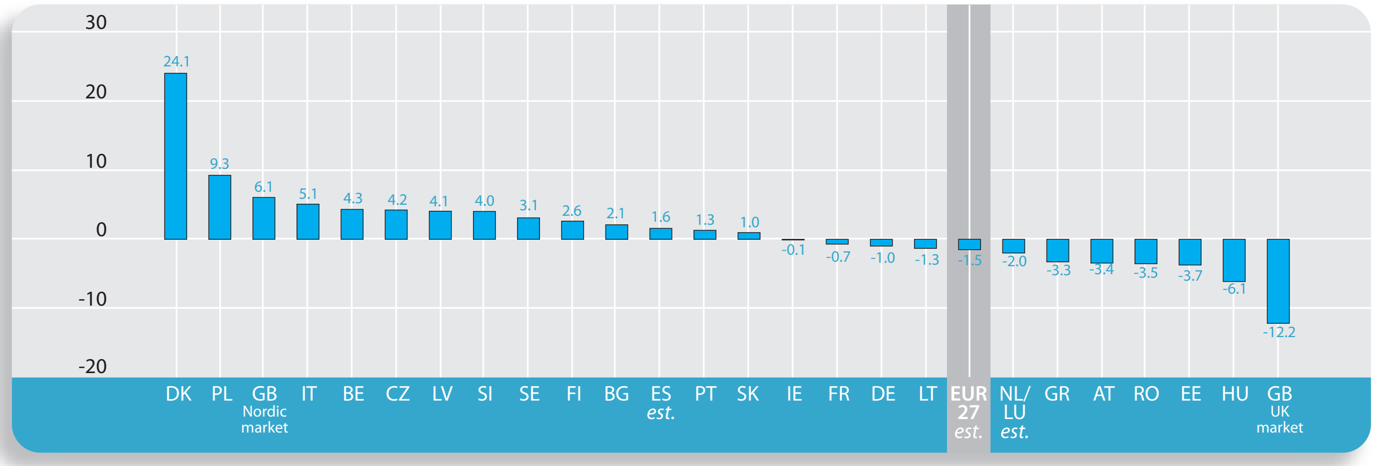


T.3.14
G.3.7

# Financial performance of private television companies financed by advertising in the European Union (EUR 27) 2006-2010 (Continued)

**Average annual rate of growth of operating revenues, in % 2006-2010**




**Return on shareholders funds 2007-2010**

| Country | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|
| BE | 38.6% | 36.6% | 25.4% | 49.6% |
| BG | 37.9% | 30.3% | 8.8% | 0.8% |
| DE | 54.9% | 57.3% | 60.1% | 76.6% |
| DK | 29.1% | 28.1% | 21.3% | 260.1% |
| EE | 44.4% | 12.7% | -27.7% | -19.5% |
| ES | 51.0% | 28.0% | -1.6% | 5.8% |
| FI | 48.0% | 38.7% | 17.6% | 33.3% |
| FR | 25.6% | 21.7% | 15.7% | 18.9% |
| GB | 39.2% | -120.0% | 0.4% | 23.7% |
| GR | -0.1% | -17.9% | -47.0% | -43.9% |
| HU | 37.8% | 32.4% | 15.3% | 5.6% |
| IE | 51.2% | 5.1% | 13.8% | 12.2% |
| IT | 18.5% | 14.7% | 12.7% | 16.9% |
| LT | 48.1% | 37.3% | 21.9% | 47.4% |
| LV | 27.8% | 34.7% | -28.4% | ~ |
| NL/LU | -0.7% | 16.5% | 7.5% | 7.4% |
| PL | 31.3% | 37.9% | 29.0% | 23.1% |
| PT | 26.5% | 26.5% | 32.5% | 36.5% |
| RO | 87.5% | 61.2% | 5.6% | -9.1% |
| SE | 58.2% | 84.4% | 51.4% | 76.0% |
| SK | 103.0% | 73.9% | 6.6% | -27.0% |

**Profit margin 2007-2010**

| Country | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|
| AT | -60.4% | -15.8% | -15.5% | 2.7% |
| BE | 14.3% | 12.7% | 9.8% | 16.2% |
| BG | 36.8% | 20.5% | -23.8% | 0.4% |
| CZ | 15.3% | 12.7% | 8.5% | 3.9% |
| DE | 17.3% | 18.3% | 21.1% | 25.3% |
| EE | 25.7% | 8.7% | -21.6% | -12.8% |
| ES | 26.8% | 15.4% | -1.0% | 7.4% |
| FI | 29.4% | 25.1% | 12.5% | 12.6% |
| FR | 19.0% | 16.9% | 13.8% | 14.5% |
| GB | 18.7% | -23.2% | 0.0% | 5.0% |
| GR | 0.0% | -8.6% | -26.7% | -23.8% |
| HU | 13.4% | 12.1% | 8.1% | 3.3% |
| IE | 14.4% | 1.4% | 3.5% | 3.2% |
| IT | 10.4% | 7.9% | 6.3% | 8.9% |
| LT | 28.5% | 27.2% | 7.5% | 19.0% |
| LV | 2.2% | 7.2% | -15.2% | -10.1% |
| NL/LU | -4.3% | 121.3% | 4.4% | 4.6% |
| PL | 21.7% | 25.7% | 25.8% | 23.1% |
| PT | 23.9% | 10.8% | 14.5% | 18.9% |
| RO | 36.3% | 12.0% | -5.4% | -10.4% |
| SE | 23.9% | 20.0% | 12.9% | 19.1% |
| SK | 34.5% | 30.4% | 3.4% | -13.4% |

Source: European Audiovisual Observatory

T.3.15

## The 40 leading European thematic television companies 2007-2010

Unconsolidated operating revenues (EUR million). Include companies providing film pay-TV premium services and "mini-generalists channels".

| Rank | Company | Country | Activities | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| 1 | Canal Plus (cons.) | **FR** | Canal+, Canal+ channels, Foot+, Rugby+, etc. | 1 740.0 | 1 813.0 | 1 775.0 | 1 787.0 | ***0.7%*** |
| 2 | Discovery Communications Europe | **GB** | Discovery Channels | 328.8 | 293.7 | 396.7 | 424.7 | ***7.1%*** |
| 3 | Eurosport | **FR** | Eurosport | 275.3 | 318.3 | 315.5 | 360.8 | ***14.4%*** |
| 4 | Satellite Information Services (Holdings) Ltd | **GB** | Racing UK | 199.9 | 207.9 | 222.8 | 288.5 | ***29.5%*** |
| 5 | C More Entertainment | **SE** | Canal+ channels | 232.7 | 211.7 | 240.8 | 277.8 | ***15.4%*** |
| 6 | Turner Entertainment Networks International | **GB** | TCM, Cartoon Network | 223.5 | 224.6 | 241.3 | 272.7 | ***13.0%*** |
| 7 | Turner Broadcasting System Europe | **GB** | CNN International | 229.4 | 223.5 | 233.7 | 238.8 | ***2.2%*** |
| 8 | Fox International Channels Italy | **IT** | Fox Italia, Fox Crime, ... | 124.4 | 152.7 | 171.9 | 184.7 | ***7.4%*** |
| 9 | ESPN (Europe, Middle east, Africa) Ltd | **GB** | ESPN | – | 5.2 | 61.7 | 178.4 | ***189.1%*** |
| 10 | Super RTL Disney Fernsehen | **DE** | Super RTL | 168.0 | 171.5 | 155.9 | 172.3 | ***10.5%*** |
| 11 | Sport TV Portugal S.A. | **PT** | Sport TV | 106.5 | 129.6 | 147.7 | 158.3 | ***7.2%*** |
| 12 | Canal+ Afrique | **FR** | Canal+ Afrique | 63.1 | 75.5 | 96.2 | 124.3 | ***29.2%*** |
| 13 | Orange Sports | **FR** | Orange Sports | 0.0 | 40.4 | 81.3 | 121.9 | ***49.9%*** |
| 14 | EDI-TV | **FR** | W9, M6 Music | 26.6 | 57.5 | 84.4 | 108.9 | ***29.0%*** |
| 15 | ITV2 Ltd | **GB** | ITV2, ITV3 | 205.8 | 191.6 | 207.3 | 96.7 | ***-53.4%*** |
| 16 | N 24 GmbH | **DE** | N24 | 98.6 | 95.6 | 96.4 | ~ | ***~*** |
| 17 | TV Norge AS | **NO** | TV Norge | 82.3 | 69.4 | 80 | 96.3 | ***20.4%*** |
| 18 | Viasat Sport A/S | **DK** | Viasat Sport | 105.8 | 108.5 | 107.4 | 93.6 | ***-12.8%*** |
| 19 | DSF Deutsches Sportfernsehen | **DE** | Sport 1 | 113.8 | 110.0 | 79.6 | 86.9 | ***9.2%*** |
| 20 | BETV | **BE** | BETV | 57.4 | 63.1 | 68.4 | 81.9 | ***19.7%*** |
| 21 | MTV Italia S.R.L. | **IT** | MTV Italia | 91.7 | 102.4 | 85.7 | 80.4 | ***-6.2%*** |
| 22 | MTV Networks Germany GmbH | **DE** | MTV Deutschland | 78.5 | 84.6 | 80.1 | ~ | ***~*** |
| 23 | Living TV Ltd | **GB** | Living TV | 115.4 | 101.9 | 135.5 | 79.8 | ***-41.1%*** |
| 24 | Skynet iMotion Activities | **BE** | 11 Jupiler League | 59.0 | 67.5 | 75.5 | 79 | ***4.6%*** |
| 25 | HBO Ceska Republika | **CZ** | HBO, HBO Comedy, Cinemax,... | 20.2 | ~ | 61.9 | 78.5 | ***26.8%*** |
| 26 | TV1000 AB | **SE** | TV1000 channels | 75.5 | 68.9 | 74.2 | 78.3 | ***5.5%*** |
| 27 | UK Channel Management | **GB** | Alibi, Eden … | 92.4 | 73.2 | 75.9 | 77 | ***1.4%*** |
| 28 | Sparrowhawk International Channels | **GB** | Hallmark channels (Europe) | 54.9 | 68.8 | 63 | 67.1 | ***6.5%*** |
| 29 | Orange Cinémas Séries | **FR** | Orange Cinéma | – | 4.0 | 40 | 65 | ***62.5%*** |
| 30 | Eurosport France | **FR** | Eurosport France | 64.9 | 64.4 | 62.4 | 66.8 | ***7.1%*** |
| 31 | AB Thématiques | **FR** | AB1, AB Moteurs, Action,… | ~ | ~ | ~ | 63.3 | ***~*** |
| 32 | MTV Networks B.V. | **NL** | MTV Nederland, Comedy Central, TMF,… | 41.7 | 60.7 | ~ | ~ | ***~*** |
| 33 | NRJ 12 | **FR** | NRJ 12 | 10.2 | 24.9 | 43.8 | 57.5 | ***31.3%*** |
| 34 | 9Live Fernsehen GmbH | **DE** | 9Live | 104.2 | 79.8 | 56.5 | ~ | ***~*** |
| 35 | Fox International Channels España | **ES** | Fox España | 34.2 | 46.2 | 56 | ~ | ***~*** |
| 36 | Zon Conteudos | **PT** | TVC, MOV | 58.3 | 61.4 | 42.8 | 55.5 | ***29.7%*** |
| 37 | n-tv Nachrichtenfernsehen GmbH | **DE** | n-tv | 52.2 | 53.4 | 47.6 | 53.8 | ***13.0%*** |
| 38 | NBC Universal Global Networks Italia | **IT** | Studio Universal, Steel | 21.4 | 40.6 | 47.6 | 53.2 | ***11.8%*** |
| 39 | HBO Polska | **PL** | HBO Polska | 19.9 | 25.7 | 42.4 | 49.6 | ***17.0%*** |
| 40 | Zonemedia Broadcasting Ltd | **GB** | Zone Club, Europa, Fantasy, Horror, Reality, Romantica, Thriller | 58.2 | 51.2 | 56 | 48.8 | ***-12.9%*** |

**Companies not publishing complete accounts:** Multithématiques (FR), Soc. d'exploitation d'un service d'information (I>Tele, FR).

Source: European Audiovisual Observatory

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T.3.16
G.3.8

# Financial situation of thematic television companies in the European Union (EUR 27) 2006-2010

| In units | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Number of companies included (1) | 466 | 493 | 507 | 484 | 450 |

| EUR million | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Total assets | 11 336 | 11 626 | 11 865 | 11 865 | 12 688 |
| Operating revenue | 8 863 | 9 317 | 9 484 | 9 990 | 10 592 |

| EUR million | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Operating profit (loss) | 428 | 155 | 232 | 306 | 495 |
| Profit (loss) before tax | 613 | 250 | 210 | 273 | 283 |
| Profit (loss) for period | 443 | 155 | 49 | 94 | 388 |

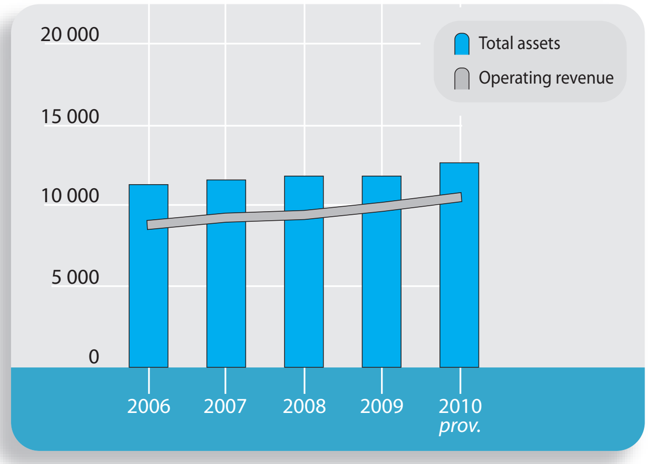
| In % | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Solvency | 17.3 | 24.3 | 23.3 | 29.7 | 30.7 |

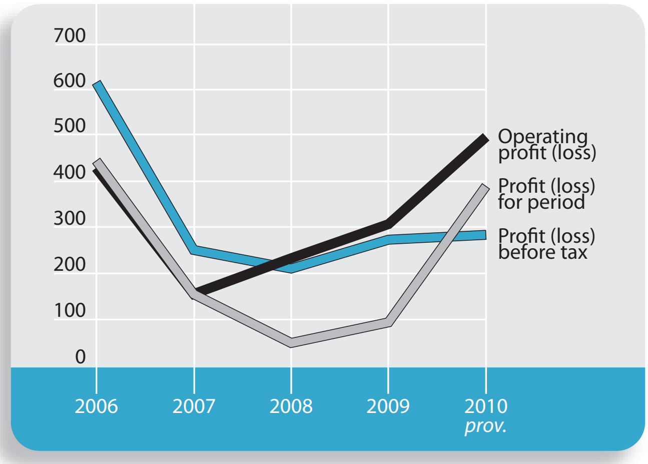
| In % | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Operating margin | 4.8 | 1.7 | 2.5 | 3.1 | 4.7 |
| Profit margin | 6.9 | 2.7 | 2.2 | 2.7 | 2.7 |
| Return on shareholders' funds | 31.4 | 9.0 | 7.6 | 7.7 | 7.3 |
| Return on total assets | 5.4 | 2.8 | -0.2 | 1.5 | 7.6 |

(1) Population has been reviewed since last edition. The corpus includes companies for which financial elements are available. The real number of companies broadcasting thematic channels in the European Union is estimated to be between 700 and 800. A great number of UK licensed companies do not publish financial statements or are indicated as dormant. Companies whose the main activity is distribution (e.g. BSkyB) are not included.

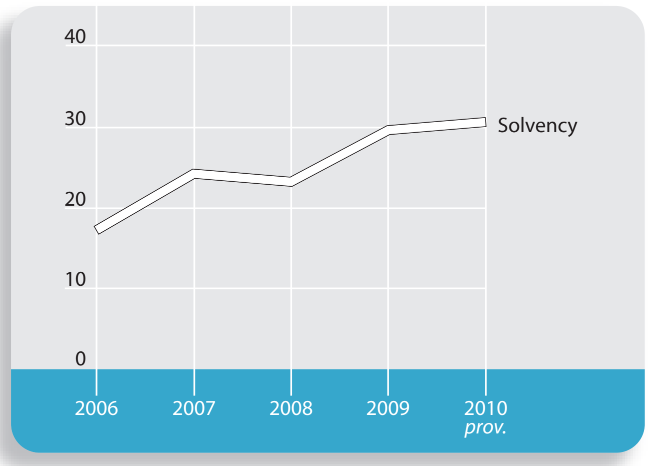
Source: European Audiovisual Observatory

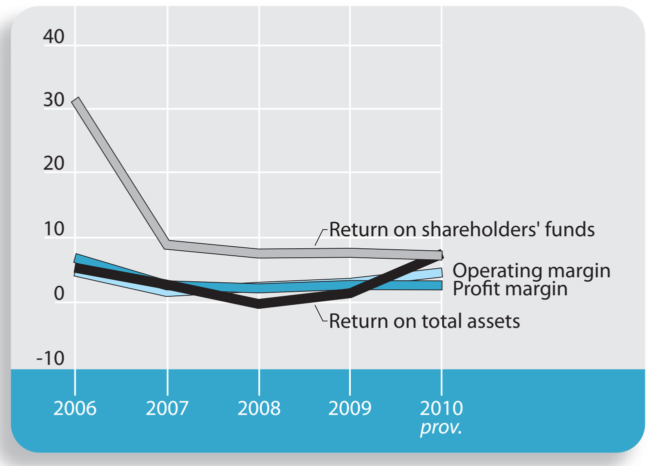
EUR million.




In %.



T.3.17

## Operating revenues of home shopping companies in Europe 2006-2010 EUR million.

| Rank | Company | TV Channels | Country | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|---|---|
| 1 | QVC Deutschland GmbH (cons.) *est.* | QVC Deutschland | **DE** | 706.6 | 624.5 | 680.3 | 672.0 | 719.0 | ***7.0%*** |
| 2 | QVC | QVC - The Shopping Channel | **GB** | 493.9 | 479.9 | 376.7 | 411.8 | 453.7 | ***10.2%*** |
| 3 | Home Shopping Europe GmbH | Home Shopping Europe | **DE** | 312.5 | 320.0 | 352.6 | 379.2 | ~ | ~ |
| 4 | Sit-Up Ltd | Sit-Up | **GB** | 336.0 | 322.7 | 251.7 | 191.7 | 173 | ***-9.8%*** |
| 5 | Ideal Shopping Direct PLC | Ideal World TV | **GB** | 127.8 | 131.4 | 99.1 | 116.2 | 137.3 | ***18.2%*** |
| 6 | Home Shopping Service (HSS) | Best of Shopping | **FR** | 113.8 | 123.4 | 127.1 | 123.6 | 121.2 | ***-1.9%*** |
| 7 | 1-2-3.TV GmbH | 1-2-3 TV | **DE** | 66.4 | 78.2 | 87.5 | 93.5 | 98.5 | ***5.3%*** |
| 8 | Channel 21 GmbH *est.* | Channel 21 Shop (formerly RTL Shop) | **DE** | 100.1 | 84.8 | ~ | 82.5 | 89 | ***7.9%*** |
| 9 | Telemarket S.P.A. | Telemarket | **IT** | 65.3 | 88.4 | 69.9 | 67.2 | 63.4 | ***-5.7%*** |
| 10 | M6 Boutique La Chaîne | M6 Boutique | **FR** | 16.6 | 27.4 | 34.7 | 36.2 | 36.8 | ***1.7%*** |
| 11 | Euvia Travel GmbH | Sonnenklar | **DE** | ~ | 26.7 | 25.5 | 26.1 | ~ | ~ |
| 12 | Canal Club de Distribución de Ocio y Cultura S.A. | Canal Club | **ES** | 33.3 | 32.5 | ~ | 20.6 | ~ | ~ |
| 13 | Mango Media SP z.o.o. | Telezakupy Mango 24 | **PL** | 4.2 | 7.8 | 12.3 | 16.7 | 17.3 | ***3.6%*** |
| 14 | Studio Moderna 2000 Shop Hungary | Top Shop | **HU** | 11 | 13.7 | 16.8 | 16.2 | 16.4 | ***1.2%*** |
| 15 | European Home Shopping SL | European Home Shopping | **ES** | 8.4 | 10.5 | 12.7 | 15.4 | ~ | ~ |
| 16 | Gems TV (UK) [1] | Gems TV | **GB** | 114.8 | 101.2 | 63.7 | 32.3 | 15.2 | – |
| 17 | JML Direct | JML Direct | **GB** | – | – | – | 15.7 | 13.9 | ***-11.5%*** |
| 18 | Guthy-Renker U.K. Ltd | TV Shop | **GB** | 16.4 | 19.6 | 15.9 | 10.5 | 12.6 | ***20.0%*** |
| *p.m.* | TV-Shop Broadcasting Ltd | TV Shop | **GB** | 5.0 | 3.4 | 1.0 | – | – | – |
| 19 | Simply Media TV Ltd | Simply TV | **GB** | – | – | 11.3 | ~ | ~ | ~ |
| 20 | Thane Direct UK Ltd | Thane Direct | **GB** | 7.6 | 7.1 | 7.5 | 6.7 | 6.9 | ***3.0%*** |
| 21 | Telebazaar Marketing *est.* | Türk Shop | **DE** | 5.2 | 5.2 | 5.2 | 5.2 | ~ | ~ |
| 22 | The Entrepreneur Channel PLC | The Entrepreneur Channel | **GB** | – | 5.6 | 4.8 | 3.8 | 3.8 | ***0.0%*** |
| 23 | Lojas de Televendas E Marketing S.A. | Gigashopping | **ES** | ~ | ~ | 2.7 | ~ | ~ | ~ |
| 24 | OCT Network s.r.o. | OCT TV | **CZ** | – | – | – | 1.7 | ~ | ~ |
| 25 | Delta TV | Delta TV | **IT** | 2.1 | 2.0 | 1.8 | 1.5 | 1.5 | ***-0.8%*** |
| 26 | QVC Italia | QVC Italia | **IT** | – | – | 0.0 | 0.1 | 1.4 | ***1300.0%*** |
| 27 | Event Network | Liberty TV | **BE** | 1.0 | 1.3 | 0.8 | 0.8 | 1.3 | ***70.1%*** |
| 27 | Thomas Cook TV Ltd | Thomas Cook TV | **GB** | 8.9 | 5.8 | 2.8 | 1.5 | 1.2 | ***-20.0%*** |
| 28 | Telestar Bulgaria EooD | Telestar | **BG** | 0.9 | 1.1 | 1.0 | 0.7 | 0.8 | ***6.3%*** |
| 29 | Irexx Television GmbH *est.* | Univermag | **DE** | – | 0.5 | 0.5 | ~ | ~ | ~ |
| 30 | TV Shop Direct International BH D.O.O. | | **BA** | 0.2 | 0.1 | 0.5 | 0.5 | 0.5 | ***-15.7%*** |
| 31 | Transact TV Ltd | IPLAY | **GB** | 0.5 | 0.3 | 0.0 | 0.0 | 0.2 | ***544.7%*** |
| 32 | Info Euroshop SRL | Canal Teleshop | **RO** | 0.1 | 0.2 | 0.2 | ~ | 0.0 | ~ |
| 33 | Event TV Vlanderen | Liberty TV | **BE** | 0.5 | 0.5 | 0.2 | 0.1 | 0.0 | |
| *p.m.* | TV Shop A/S | TV Shop | **DK** | 4.0 | 3.3 | 2.5 | – | – | – |
| *p.m.* | Elefante TV | Elefante TV Telemarket | **IT** | 1.2 | 1.2 | 1.3 | – | – | – |
| *p.m.* | Real Estate TV | Real Estate TV | **GB** | 1.8 | 3.2 | 1.6 | 0.7 | – | – |
| *p.m.* | Canal Teleshop SRL | Canal Teleshop | **RO** | 0.4 | 0.6 | 0.7 | – | – | – |
| *p.m.* | RTN Realestate Television Network GmbH *est.* | RTN My Estate | **DE** | – | 0.2 | 0.2 | – | – | – |
| *p.m.* | Sirius Retail Television [2] | TV Warehouse | **GB** | 0.6 | 0.0 | 0.0 | – | – | – |

[1] 2010 over 9 months.

[2] 2006 over 15 months.

Source: European Audiovisual Observatory

T.3.18
G.3.9

# Financial situation of home shopping companies in the European Union (EUR 27) 2006-2010

| In units | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Number of companies included (1) | 37 | 37 | 37 | 30 | 28 |

| EUR million | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Total assets | 1 270 | 1 338 | 1 291 | 1 107 | 1 144 |
| Operating revenue | 2 635 | 2 564 | 2 393 | 2 384 | 2 442 |

| EUR million | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Operating profit (loss) | 125 | 58 | 46 | 99 | 144 |
| Profit (loss) before tax | 213 | 79 | 54 | 103 | 145 |
| Profit (loss) for period | 150 | 63 | 36 | 10 | 25 |

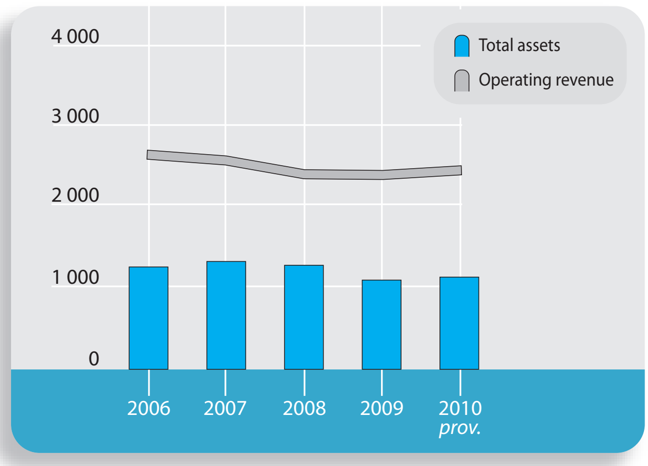
| In % | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Solvency | 42.7 | 42.7 | 37.6 | 23.3 | 22.6 |

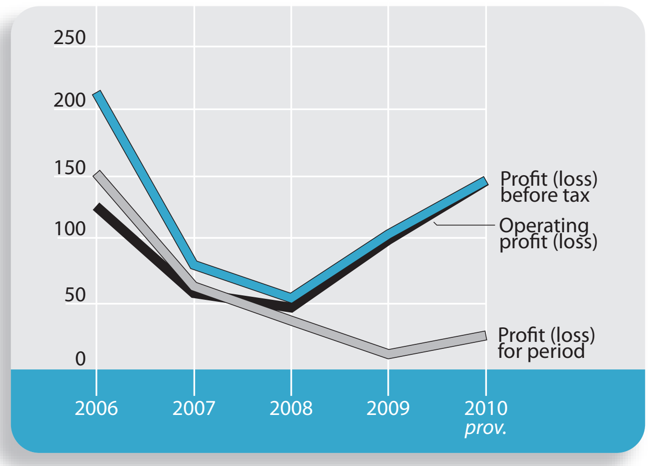
| In % | 2006 | 2007 | 2008 | 2009 | *prov.* 2010 |
|---|---|---|---|---|---|
| Operating margin | 4.7 | 2.2 | 1.9 | 4.1 | 5.9 |
| Profit margin | 8.1 | 3.1 | 2.2 | 4.3 | 5.9 |
| Return on shareholders' funds | 16.8 | 5.9 | 4.2 | 9.3 | 12.6 |
| Return on total assets | 35.9 | 10.0 | 10.9 | 42.3 | 54.1 |

(1) Population reviewed since last edition.

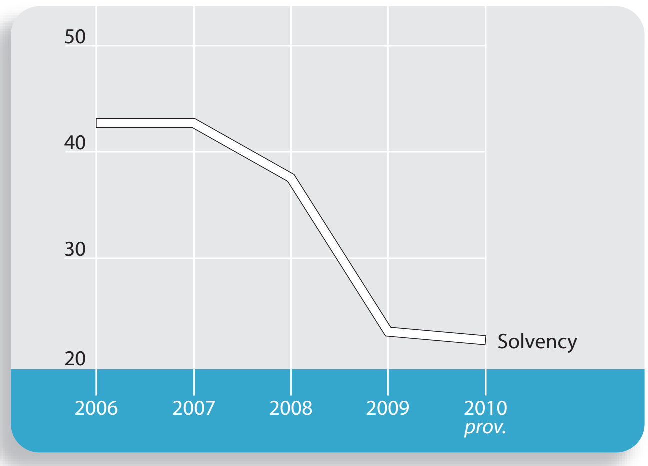
Source: European Audiovisual Observatory

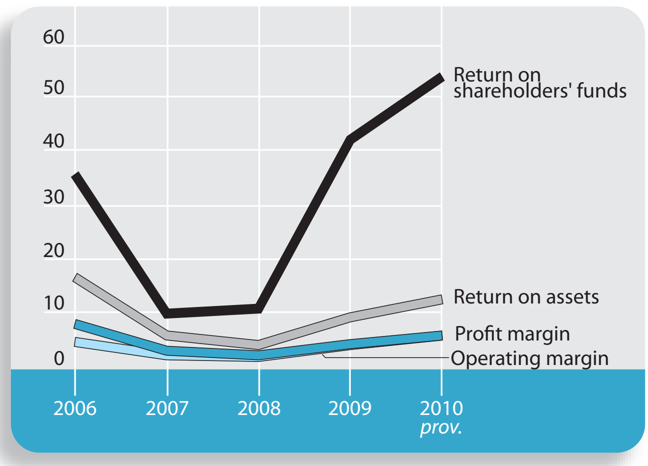
EUR million.




In %.



T.3.19

## Gross radio-TV revenues in the European Union (EUR 27) 2006-2010 EUR million.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 | Yearly average growth |
|---|---|---|---|---|---|---|---|---|
| **AT** | TV adspend | 523.6 | 573.2 | 598.0 | 602.8 | 648.1 | **7.5%** | *5.5%* |
| | Radio-TV public income | 463.7 | 474.1 | 505.0 | 527.9 | 581.0 | **10.1%** | *5.8%* |
| | Radio adspend | 163.4 | 166.5 | 170.8 | 165.2 | 174.1 | **5.4%** | *1.6%* |
| | Consumers pay-TV spend | 268.2 | 290.8 | 323.2 | 352.2 | 383.8 | **9.0%** | *9.4%* |
| | ***Total*** | ***1 418.9*** | ***1 504.6*** | ***1 597.0*** | ***1 648.1*** | ***1 787.0*** | **8.4%** | ***5.9%*** |
| **BE** | TV adspend | 831.2 | 853.6 | 869.8 | 910.1 | 990.0 | **8.8%** | *4.5%* |
| | Radio-TV public income | 455.2 | 498.5 | 511.5 | 526.9 | 520.4 | **-1.2%** | *3.4%* |
| | Radio adspend | 276.3 | 286.3 | 284.8 | 271.9 | 299.2 | **10.0%** | *2.0%* |
| | Consumers pay-TV spend | 650.4 | 699.7 | 777.3 | 972.8 | 1 167.4 | **20.0%** | *15.7%* |
| | ***Total*** | ***2 213.1*** | ***2 338.1*** | ***2 443.4*** | ***2 681.7*** | ***2 977.0*** | **11.0%** | ***7.7%*** |
| **BG** | TV adspend | 200.0 | 260.0 | 292.4 | 239.4 | 239.7 | **0.1%** | *4.6%* |
| | Radio-TV public income (1) | 58.2 | 65.7 | 68.9 | 64.9 | 62.4 | **-3.9%** | *1.8%* |
| | Radio adspend | 5.0 | 5.9 | 8.1 | 10.3 | 6.3 | **-38.8%** | *5.9%* |
| | Consumers pay-TV spend | 139.7 | 164.6 | 180.2 | 185.9 | 161.6 | **-13.1%** | *3.7%* |
| | ***Total*** | ***402.9*** | ***496.2*** | ***549.6*** | ***500.5*** | ***470.0*** | **-6.1%** | ***3.9%*** |
| **CY** | TV adspend | 46.90 | 52.27 | 55.90 | 62.64 | 59.10 | **-5.7%** | *6.0%* |
| | Radio-TV public income | 24.76 | 25.89 | 34.72 | 29.14 | 38.92 | **33.6%** | *12.0%* |
| | Radio adspend | 6.90 | 6.86 | 7.21 | 7.27 | 7.00 | **-3.7%** | *0.4%* |
| | Consumers pay-TV spend | 10.74 | 15.73 | 20.89 | 24.52 | 25.70 | **4.8%** | *24.4%* |
| | ***Total*** | ***89.3*** | ***100.8*** | ***118.7*** | ***123.6*** | ***130.7*** | **5.8%** | ***10.0%*** |
| **CZ** | TV adspend | 312.5 | 343.3 | 391.1 | 334.7 | 339.4 | **1.4%** | *2.1%* |
| | Radio-TV public income | 214.7 | 263.2 | 290.2 | 297.8 | 312.1 | **4.8%** | *9.8%* |
| | Radio adspend | 49.3 | 52.3 | 61.9 | 43.3 | 68.1 | **57.3%** | *8.4%* |
| | Consumers pay-TV spend | 151.7 | 196.9 | 273.3 | 286.3 | 311.9 | **9.0%** | *19.7%* |
| | ***Total*** | ***728.2*** | ***855.6*** | ***1 016.5*** | ***962.1*** | ***1 031.5*** | **7.2%** | ***9.1%*** |
| **DE** | TV adspend | 4 525.7 | 4 571.4 | 4 439.1 | 4 003.6 | 4 349.1 | **8.6%** | *-1.0%* |
| | Radio-TV public income | 7 366.2 | 7 374.1 | 7 345.8 | 7 683.3 | 7 617.6 | **-0.9%** | *0.8%* |
| | Radio adspend | 748.5 | 817.7 | 791.7 | 746.3 | 761.3 | **2.0%** | *0.4%* |
| | Consumers pay-TV spend | 3 249.2 | 3 388.1 | 3 541.6 | 3 936.4 | 4 389.7 | **11.5%** | *7.8%* |
| | ***Total*** | ***15 889.6*** | ***16 151.3*** | ***16 118.2*** | ***16 369.6*** | ***17 117.7*** | **4.6%** | ***1.9%*** |
| **DK** | TV adspend | 331.2 | 337.7 | 325.9 | 276.4 | 300.8 | **8.8%** | *-2.4%* |
| | Radio-TV public income | 413.0 | 436.6 | 446.2 | 453.7 | 465.7 | **2.6%** | *3.0%* |
| | Radio adspend | 37.4 | 38.3 | 33.5 | 29.1 | 30.9 | **6.2%** | *-4.7%* |
| | Consumers pay-TV spend | 636.3 | 733.8 | 815.0 | 864.9 | 910.0 | **5.2%** | *9.4%* |
| | ***Total*** | ***1 417.9*** | ***1 546.3*** | ***1 620.6*** | ***1 624.1*** | ***1 707.4*** | **5.1%** | ***4.8%*** |
| **EE** | TV adspend | 23.2 | 30.6 | 30.0 | 20.8 | 21.1 | **1.4%** | *-2.3%* |
| | Radio-TV public income | 21.3 | 25.3 | 28.7 | 26.7 | 24.4 | **-8.6%** | *3.5%* |
| | Radio adspend | 6.7 | 8.6 | 9.4 | 7.0 | 6.5 | **-7.1%** | *-0.8%* |
| | Consumers pay-TV spend | 25.5 | 33.1 | 41.5 | 47.5 | 52.0 | **9.5%** | *19.5%* |
| | ***Total*** | ***76.7*** | ***97.6*** | ***109.6*** | ***102.0*** | ***104.0*** | **2.0%** | ***7.9%*** |
| **ES** | TV adspend | 3 188.4 | 3 467.0 | 3 038.7 | 2 377.8 | 2 471.9 | **4.0%** | *-6.2%* |
| | Radio-TV public income (2) | 1 191.0 | 1 026.5 | 1 277.5 | 1 450.4 | 1 848.9 | **27.5%** | *11.6%* |
| | Radio adspend | 636.7 | 678.1 | 571.8 | 537.2 | 548.5 | **2.1%** | *-3.7%* |
| | Consumers pay-TV spend | 1 807.7 | 1 880.1 | 1 916.3 | 1 802.7 | 1 810.0 | **0.4%** | *0.0%* |
| | ***Total*** | ***6 823.8*** | ***7 051.7*** | ***6 804.3*** | ***6 168.1*** | ***6 679.3*** | **8.3%** | ***-0.5%*** |
| **FI** | TV adspend | 269.9 | 291.2 | 297.9 | 263.6 | 295.4 | **12.1%** | *2.3%* |
| | Radio-TV public income | 379.4 | 387.0 | 380.5 | 394.3 | 398.4 | **1.0%** | *1.2%* |
| | Radio adspend | 52.2 | 52.2 | 56.1 | 55.2 | 57.8 | **4.7%** | *2.6%* |
| | Consumers pay-TV spend | 240.2 | 296.2 | 299.4 | 312.3 | 306.0 | **-2.0%** | *6.2%* |
| | ***Total*** | ***941.6*** | ***1 026.6*** | ***1 033.9*** | ***1 025.4*** | ***1 057.6*** | **3.1%** | ***2.9%*** |
| **FR** | TV adspend | 3 896.9 | 4 033.0 | 3 875.7 | 3 449.8 | 3 836.7 | **11.2%** | *-0.4%* |
| | Radio-TV public income | 2 486.4 | 2 759.7 | 2 923.0 | 3 443.9 | 3 523.1 | **2.3%** | *9.1%* |
| | Radio adspend | 945.5 | 897.6 | 868.6 | 789.4 | 829.6 | **5.1%** | *-3.2%* |
| | Consumers pay-TV spend | 3 351.8 | 3 394.2 | 3 459.9 | 3 632.7 | 3 970.8 | **9.3%** | *4.3%* |
| | ***Total*** | ***10 680.6*** | ***11 084.4*** | ***11 127.2*** | ***11 315.8*** | ***12 160.2*** | **7.5%** | ***3.3%*** |

T.3.19

## Gross radio-TV revenues in the European Union (EUR 27) (Continued)

## 2006-2010 EUR million.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 | Yearly average growth |
|---|---|---|---|---|---|---|---|---|
| **GB** | TV adspend | 6 000.9 | 6 172.1 | 5 147.9 | 4 171.8 | 5 053.1 | **21.1%** | *-4.2%* |
| | Radio-TV public income | 5 354.0 | 4 775.0 | 4 227.0 | 4 366.0 | 4 584.3 | **5.0%** | *-3.8%* |
| | Radio adspend | 855.4 | 879.7 | 700.4 | 568.1 | 614.8 | **8.2%** | *-7.9%* |
| | Consumers pay-TV spend | 6 833.6 | 7 324.3 | 6 513.6 | 6 593.0 | 7 778.4 | **18.0%** | *3.3%* |
| | ***Total*** | ***19 043.9*** | ***19 151.1*** | ***16 588.9*** | ***15 698.9*** | ***18 030.6*** | ***14.9%*** | ***-1.4%*** |
| **GR** | TV adspend | 753.9 | 894.4 | 818.9 | 679.2 | 524.8 | **-22.7%** | *-8.7%* |
| | Radio-TV public income | 258.0 | 293.3 | 299.0 | 295.0 | 352.4 | **19.5%** | *8.1%* |
| | Radio adspend | 59.7 | 82.8 | 107.5 | 83.1 | 62.1 | **-25.3%** | *1.0%* |
| | Consumers pay-TV spend | 187.2 | 208.8 | 219.7 | 238.2 | 266.8 | **12.0%** | *9.3%* |
| | ***Total*** | ***1 258.8*** | ***1 479.3*** | ***1 445.1*** | ***1 295.5*** | ***1 206.1*** | ***-6.9%*** | ***-1.1%*** |
| **HU** | TV adspend | 412.6 | 403.9 | 421.2 | 391.5 | 396.4 | **1.3%** | *-1.0%* |
| | Radio-TV public income ❶ | 155.0 | 156.0 | 162.0 | 155.0 | 144.0 | **-7.1%** | *-1.8%* |
| | Radio adspend | 78.2 | 85.5 | 84.6 | 39.9 | 39.1 | **-2.0%** | *-15.9%* |
| | Consumers pay-TV spend | 424.9 | 484.8 | 502.1 | 462.1 | 481.9 | **4.3%** | *3.2%* |
| | ***Total*** | ***1 070.7*** | ***1 130.2*** | ***1 169.9*** | ***1 048.5*** | ***1 061.4*** | ***1.2%*** | ***-0.2%*** |
| **IE** | TV adspend | 316.3 | 374.3 | 363.2 | 312.0 | 277.1 | **-11.2%** | *-3.3%* |
| | Radio-TV public income | 182.8 | 195.7 | 200.9 | 200.2 | 196.0 | **-2.1%** | *1.8%* |
| | Radio adspend | 124.1 | 140.3 | 148.1 | 123.2 | 111.5 | **-9.5%** | *-2.6%* |
| | Consumers pay-TV spend | 397.7 | 462.8 | 492.1 | 530.8 | 559.1 | **5.3%** | *8.9%* |
| | ***Total*** | ***1 021.0*** | ***1 173.1*** | ***1 204.3*** | ***1 166.2*** | ***1 143.7*** | ***-1.9%*** | ***2.9%*** |
| **IT** | TV adspend | 4 598.8 | 4 653.5 | 4 851.0 | 4 359.0 | 4 619.3 | **6.0%** | *0.1%* |
| | Radio-TV public income | 1 585.9 | 1 634.7 | 1 676.0 | 1 730.7 | 1 771.7 | **2.4%** | *2.8%* |
| | Radio adspend | 440.7 | 476.8 | 473.0 | 436.0 | 470.0 | **7.8%** | *1.6%* |
| | Consumers pay-TV spend | 1 940.1 | 2 348.7 | 2 684.7 | 3 124.9 | 3 650.9 | **16.8%** | *17.1%* |
| | ***Total*** | ***8 565.4*** | ***9 113.7*** | ***9 684.7*** | ***9 650.6*** | ***10 511.9*** | ***8.9%*** | ***5.3%*** |
| **LT** | TV adspend | 54.2 | 65.8 | 66.4 | 41.8 | 43.8 | **4.8%** | *-5.2%* |
| | Radio-TV public income ❶ | 12.3 | 14.0 | 15.6 | 12.4 | 10.2 | **-17.7%** | *-4.6%* |
| | Radio adspend | 8.1 | 9.9 | 11.2 | 8.1 | 7.4 | **-8.4%** | *-2.3%* |
| | Consumers pay-TV spend | 28.1 | 37.1 | 45.5 | 51.7 | 54.7 | **5.8%** | *18.1%* |
| | ***Total*** | ***102.7*** | ***126.8*** | ***138.7*** | ***114.0*** | ***116.1*** | ***1.9%*** | ***3.1%*** |
| **LU** | TV adspend | 10.0 | 10.0 | 14.0 | 14.9 | 14.7 | **-1.3%** | *10.1%* |
| | Radio-TV public income | | 0.5 | 0.7 | 0.7 | 0.6 | **-14.3%** | *4.7%* |
| | Radio adspend | 20.1 | 27.1 | 26.2 | 27.3 | 27.9 | **2.3%** | *8.6%* |
| | Consumers pay-TV spend | 20.9 | 21.9 | 22.8 | 25.9 | 27.5 | **6.1%** | *7.0%* |
| | ***Total*** | ***51.0*** | ***59.5*** | ***63.7*** | ***68.8*** | ***70.7*** | ***2.8%*** | ***8.5%*** |
| **LV** | TV adspend | 38.7 | 46.9 | 48.9 | 29.3 | 28.9 | **-1.4%** | *-7.0%* |
| | Radio-TV public income | 15.3 | 18.7 | 21.2 | 19.0 | 15.6 | **-17.9%** | *0.5%* |
| | Radio adspend | 12.1 | 14.0 | 14.9 | 9.2 | 7.5 | **-18.5%** | *-11.3%* |
| | Consumers pay-TV spend | 29.5 | 36.2 | 42.0 | 46.9 | 59.9 | **27.7%** | *19.4%* |
| | ***Total*** | ***95.6*** | ***115.8*** | ***127.0*** | ***104.4*** | ***111.9*** | ***7.2%*** | ***4.0%*** |
| **MT** | TV adspend | 8.7 | 8.3 | 7.5 | 7.1 | 7.5 | **5.6%** | *-3.6%* |
| | Radio-TV public income | 1.2 | 1.2 | 1.2 | 1.2 | 2.2 | **83.3%** | *16.4%* |
| | Radio adspend | 2.4 | 2.3 | 1.9 | 1.8 | 2.1 | **16.7%** | *-3.3%* |
| | Consumers pay-TV spend | 13.2 | 15.0 | 16.4 | 18.0 | 20.4 | **13.3%** | *11.6%* |
| | ***Total*** | ***25.5*** | ***26.8*** | ***27.0*** | ***28.1*** | ***32.2*** | ***14.6%*** | ***6.1%*** |
| **NL** | TV adspend | 810.0 | 862.7 | 867.0 | 791.5 | 875.4 | **10.6%** | *2.0%* |
| | Radio-TV public income | 567.6 | 712.2 | 785.8 | 791.9 | 817.7 | **3.3%** | *9.6%* |
| | Radio adspend | 262.0 | 274.3 | 278.7 | 234.4 | 246.1 | **5.0%** | *-1.6%* |
| | Consumers pay-TV spend | 1 229.7 | 1 331.2 | 1 397.6 | 1 482.6 | 1 599.3 | **7.9%** | *6.8%* |
| | ***Total*** | ***2 869.3*** | ***3 180.4*** | ***3 329.1*** | ***3 300.4*** | ***3 538.5*** | ***7.2%*** | ***5.4%*** |
| **PL** | TV adspend | 806.4 | 908.7 | 1 045.0 | 693.6 | 864.7 | **24.7%** | *1.8%* |
| | Radio-TV public income ❶ | 195.0 | 205.0 | 166.0 | 124.0 | 105.6 | **-14.8%** | *-14.2%* |
| | Radio adspend | 130.3 | 153.7 | 179.9 | 165.4 | 201.3 | **21.7%** | *11.5%* |
| | Consumers pay-TV spend | 774.3 | 977.2 | 1 322.5 | 1 292.4 | 1 603.4 | **24.1%** | *20.0%* |
| | ***Total*** | ***1 906.0*** | ***2 244.6*** | ***2 713.4*** | ***2 275.4*** | ***2 775.0*** | ***22.0%*** | ***9.8%*** |

T.3.19

## Gross radio-TV revenues in the European Union (EUR 27) (Continued)

## 2006-2010 EUR million.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 | Yearly average growth |
|---|---|---|---|---|---|---|---|---|
| **PT** | TV adspend | 1 164.5 | 1 203.5 | 1 232.4 | 1 301.4 | 1 405.1 | ***8.0%*** | *4.8%* |
| | Radio-TV public income | 224.3 | 240.3 | 227.5 | 234.5 | 230.6 | ***-1.7%*** | *0.7%* |
| | Radio adspend | 102.6 | 101.8 | 99.2 | 109.9 | 112.1 | ***2.0%*** | *2.2%* |
| | Consumers pay-TV spend | 595.4 | 642.5 | 704.4 | 759.6 | 888.2 | ***16.9%*** | *10.5%* |
| | ***Total*** | ***2 086.8*** | ***2 188.1*** | ***2 263.5*** | ***2 405.4*** | ***2 636.0*** | ***9.6%*** | ***6.0%*** |
| **RO** | TV adspend | 495.8 | 487.6 | 465.9 | 222.7 | 240.6 | ***8.0%*** | *-16.5%* |
| | Radio-TV public income | 216.6 | 213.9 | 212.2 | 210.6 | 205.1 | ***-2.6%*** | *-1.4%* |
| | Radio adspend | 48.4 | 59.7 | 73.4 | 47.3 | 48.0 | ***1.5%*** | *-0.2%* |
| | Consumers pay-TV spend | 297.2 | 399.1 | 428.9 | 397.5 | 406.9 | ***2.4%*** | *8.2%* |
| | ***Total*** | ***1 058.0*** | ***1 160.3*** | ***1 180.4*** | ***878.1*** | ***900.6*** | ***2.6%*** | ***-3.9%*** |
| **SE** | TV adspend | 545.1 | 562.1 | 570.7 | 454.8 | 637.4 | ***40.1%*** | *4.0%* |
| | Radio-TV public income | 682.1 | 660.6 | 568.2 | 588.5 | 732.1 | ***24.4%*** | *1.8%* |
| | Radio adspend | 71.8 | 83.4 | 83.1 | 65.0 | 84.4 | ***29.8%*** | *4.1%* |
| | Consumers pay-TV spend | 846.7 | 951.9 | 968.9 | 904.0 | 1 001.0 | ***10.7%*** | *4.3%* |
| | ***Total*** | ***2 145.7*** | ***2 258.0*** | ***2 190.9*** | ***2 012.3*** | ***2 454.9*** | ***22.0%*** | ***3.4%*** |
| **SI** | TV adspend | 107.0 | 134.0 | 142.6 | 157.1 | 203.0 | ***29.2%*** | *17.4%* |
| | Radio-TV public income | 77.7 | 79.6 | 84.1 | 88.3 | 95.2 | ***7.8%*** | *5.2%* |
| | Radio adspend | 11.5 | 12.3 | 13.9 | 13.9 | 13.9 | ***0.0%*** | *4.8%* |
| | Consumers pay-TV spend | 44.3 | 53.3 | 65.7 | 73.8 | 80.5 | ***9.1%*** | *16.1%* |
| | ***Total*** | ***240.5*** | ***279.1*** | ***306.3*** | ***333.1*** | ***392.6*** | ***17.9%*** | ***13.0%*** |
| **SK** | TV adspend | 482.3 | 628.1 | 888.4 | 495.5 | 485.4 | ***-2.0%*** | *0.2%* |
| | Radio-TV public income (2) | 68.6 | 70.2 | 77.0 | 92.7 | 90.6 | ***-2.3%*** | *7.2%* |
| | Radio adspend | 24.3 | 30.2 | 39.4 | 44.1 | 47.7 | ***8.2%*** | *18.4%* |
| | Consumers pay-TV spend | 96.5 | 127.6 | 160.2 | 185.4 | 229.8 | ***23.9%*** | *24.2%* |
| | ***Total*** | ***671.7*** | ***856.1*** | ***1 165.0*** | ***817.7*** | ***853.5*** | ***4.4%*** | ***6.2%*** |
| | | | | | | | | |
| **EUR 27** | TV adspend | 30 754.7 | 32 229.1 | 31 165.6 | 26 664.9 | 29 228.5 | ***9.6%*** | *-1.3%* |
| | Radio-TV public income | 22 670.3 | 22 607.5 | 22 536.3 | 23 809.6 | 24 746.8 | ***3.9%*** | *2.2%* |
| | Radio adspend | 5 179.6 | 5 444.0 | 5 199.4 | 4 638.8 | 4 885.2 | ***5.3%*** | *-1.5%* |
| | Consumers pay-TV spend | 24 290.6 | 26 515.5 | 27 235.5 | 28 605.1 | 32 197.7 | ***12.6%*** | *7.3%* |
| | ***Total*** | ***82 895.2*** | ***86 796.1*** | ***86 136.8*** | ***83 718.4*** | ***91 058.2*** | ***8.8%*** | ***2.4%*** |

(1) 2010 data estimated.

(2) Estimates.

Source: European Audiovisual Observatory on EBU, Screen Digest and Warc data

T.3.20

## Relative importance of gross radio-TV revenues in the European Union (EUR 27) 2006-2010

In % of total revenues.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| AT | TV adspend | 36.9% | 38.1% | 37.4% | 36.6% | 36.3% |
| | Radio-TV public income | 32.7% | 31.5% | 31.6% | 32.0% | 32.5% |
| | Radio adspend | 11.5% | 11.1% | 10.7% | 10.0% | 9.7% |
| | Consumers pay-TV spend | 18.9% | 19.3% | 20.2% | 21.4% | 21.5% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| BE | TV adspend | 37.6% | 36.5% | 35.6% | 33.9% | 33.3% |
| | Radio-TV public income | 20.6% | 21.3% | 20.9% | 19.6% | 17.5% |
| | Radio adspend | 12.5% | 12.2% | 11.7% | 10.1% | 10.1% |
| | Consumers pay-TV spend | 29.4% | 29.9% | 31.8% | 36.3% | 39.2% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| BG | TV adspend | 49.6% | 52.4% | 53.2% | 47.8% | 51.0% |
| | Radio-TV public income (1) | 14.4% | 13.2% | 12.5% | 13.0% | 13.3% |
| | Radio adspend | 1.2% | 1.2% | 1.5% | 2.1% | 1.3% |
| | Consumers pay-TV spend | 34.7% | 33.2% | 32.8% | 37.1% | 34.4% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| CY | TV adspend | 52.5% | 51.9% | 47.1% | 50.7% | 45.2% |
| | Radio-TV public income | 27.7% | 25.7% | 29.2% | 23.6% | 29.8% |
| | Radio adspend | 7.7% | 6.8% | 6.1% | 5.9% | 5.4% |
| | Consumers pay-TV spend | 12.0% | 15.6% | 17.6% | 19.8% | 19.7% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| CZ | TV adspend | 42.9% | 40.1% | 38.5% | 34.8% | 32.9% |
| | Radio-TV public income | 29.5% | 30.8% | 28.5% | 31.0% | 30.3% |
| | Radio adspend | 6.8% | 6.1% | 6.1% | 4.5% | 6.6% |
| | Consumers pay-TV spend | 20.8% | 23.0% | 26.9% | 29.8% | 30.2% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| DE | TV adspend | 28.5% | 28.3% | 27.5% | 24.5% | 25.4% |
| | Radio-TV public income | 46.4% | 45.7% | 45.6% | 46.9% | 44.5% |
| | Radio adspend | 4.7% | 5.1% | 4.9% | 4.6% | 4.4% |
| | Consumers pay-TV spend | 20.4% | 21.0% | 22.0% | 24.0% | 25.6% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| DK | TV adspend | 23.4% | 21.8% | 20.1% | 17.0% | 17.6% |
| | Radio-TV public income | 29.1% | 28.2% | 27.5% | 27.9% | 27.3% |
| | Radio adspend | 2.6% | 2.5% | 2.1% | 1.8% | 1.8% |
| | Consumers pay-TV spend | 44.9% | 47.5% | 50.3% | 53.3% | 53.3% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| EE | TV adspend | 30.2% | 31.3% | 27.4% | 20.4% | 20.3% |
| | Radio-TV public income | 27.8% | 25.9% | 26.2% | 26.2% | 23.5% |
| | Radio adspend | 8.7% | 8.8% | 8.6% | 6.9% | 6.3% |
| | Consumers pay-TV spend | 33.3% | 33.9% | 37.9% | 46.6% | 50.0% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| ES | TV adspend | 46.7% | 49.2% | 44.7% | 38.5% | 37.0% |
| | Radio-TV public income (2) | 17.5% | 14.6% | 18.8% | 23.5% | 27.7% |
| | Radio adspend | 9.3% | 9.6% | 8.4% | 8.7% | 8.2% |
| | Consumers pay-TV spend | 26.5% | 26.7% | 28.2% | 29.2% | 27.1% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| FI | TV adspend | 28.7% | 28.4% | 28.8% | 25.7% | 27.9% |
| | Radio-TV public income | 40.3% | 37.7% | 36.8% | 38.5% | 37.7% |
| | Radio adspend | 5.5% | 5.1% | 5.4% | 5.4% | 5.5% |
| | Consumers pay-TV spend | 25.5% | 28.9% | 29.0% | 30.5% | 28.9% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| FR | TV adspend | 36.5% | 36.4% | 34.8% | 30.5% | 31.6% |
| | Radio-TV public income | 23.3% | 24.9% | 26.3% | 30.4% | 29.0% |
| | Radio adspend | 8.9% | 8.1% | 7.8% | 7.0% | 6.8% |
| | Consumers pay-TV spend | 31.4% | 30.6% | 31.1% | 32.1% | 32.7% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |

T.3.20

## Relative importance of gross radio-TV revenues in the European Union (EUR 27) (Continued) 2006-2010

In % of total revenues.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| **GB** | TV adspend | 31.5% | 32.2% | 31.0% | 26.6% | 28.0% |
| | Radio-TV public income | 28.1% | 24.9% | 25.5% | 27.8% | 25.4% |
| | Radio adspend | 4.5% | 4.6% | 4.2% | 3.6% | 3.4% |
| | Consumers pay-TV spend | 35.9% | 38.2% | 39.3% | 42.0% | 43.1% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **GR** | TV adspend | 59.9% | 60.5% | 56.7% | 52.4% | 43.5% |
| | Radio-TV public income | 20.5% | 19.8% | 20.7% | 22.8% | 29.2% |
| | Radio adspend | 4.7% | 5.6% | 7.4% | 6.4% | 5.1% |
| | Consumers pay-TV spend | 14.9% | 14.1% | 15.2% | 18.4% | 22.1% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **HU** | TV adspend | 38.5% | 35.7% | 36.0% | 37.3% | 37.3% |
| | Radio-TV public income ❶ | 14.5% | 13.8% | 13.8% | 14.8% | 13.6% |
| | Radio adspend | 7.3% | 7.6% | 7.2% | 3.8% | 3.7% |
| | Consumers pay-TV spend | 39.7% | 42.9% | 42.9% | 44.1% | 45.4% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **IE** | TV adspend | 31.0% | 31.9% | 30.2% | 26.8% | 24.2% |
| | Radio-TV public income | 17.9% | 16.7% | 16.7% | 17.2% | 17.1% |
| | Radio adspend | 12.2% | 12.0% | 12.3% | 10.6% | 9.7% |
| | Consumers pay-TV spend | 39.0% | 39.5% | 40.9% | 45.5% | 48.9% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **IT** | TV adspend | 53.7% | 51.1% | 50.1% | 45.2% | 43.9% |
| | Radio-TV public income | 18.5% | 17.9% | 17.3% | 17.9% | 16.9% |
| | Radio adspend | 5.1% | 5.2% | 4.9% | 4.5% | 4.5% |
| | Consumers pay-TV spend | 22.7% | 25.8% | 27.7% | 32.4% | 34.7% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **LT** | TV adspend | 52.8% | 51.9% | 47.9% | 36.7% | 37.7% |
| | Radio-TV public income ❶ | 12.0% | 11.0% | 11.2% | 10.9% | 8.8% |
| | Radio adspend | 7.9% | 7.8% | 8.1% | 7.1% | 6.4% |
| | Consumers pay-TV spend | 27.4% | 29.2% | 32.8% | 45.4% | 47.1% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **LU** | TV adspend | 19.6% | 16.8% | 22.0% | 21.7% | 20.8% |
| | Radio-TV public income | 0.0% | 0.8% | 1.1% | 1.0% | 0.8% |
| | Radio adspend | 39.4% | 45.6% | 41.2% | 39.7% | 39.5% |
| | Consumers pay-TV spend | 41.0% | 36.8% | 35.7% | 37.6% | 38.9% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **LV** | TV adspend | 40.5% | 40.5% | 38.5% | 28.1% | 25.8% |
| | Radio-TV public income | 16.0% | 16.1% | 16.7% | 18.2% | 13.9% |
| | Radio adspend | 12.7% | 12.1% | 11.8% | 8.8% | 6.7% |
| | Consumers pay-TV spend | 30.8% | 31.3% | 33.0% | 44.9% | 53.5% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **MT** | TV adspend | 34.2% | 31.0% | 27.8% | 25.3% | 23.3% |
| | Radio-TV public income | 4.7% | 4.5% | 4.5% | 4.3% | 6.8% |
| | Radio adspend | 9.4% | 8.6% | 7.0% | 6.4% | 6.5% |
| | Consumers pay-TV spend | 51.7% | 56.0% | 60.7% | 64.1% | 63.4% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **NL** | TV adspend | 28.2% | 27.1% | 26.0% | 24.0% | 24.7% |
| | Radio-TV public income | 19.8% | 22.4% | 23.6% | 24.0% | 23.1% |
| | Radio adspend | 9.1% | 8.6% | 8.4% | 7.1% | 7.0% |
| | Consumers pay-TV spend | 42.9% | 41.9% | 42.0% | 44.9% | 45.2% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **PL** | TV adspend | 42.3% | 40.5% | 38.5% | 30.5% | 31.2% |
| | Radio-TV public income ❶ | 10.2% | 9.1% | 6.1% | 5.4% | 3.8% |
| | Radio adspend | 6.8% | 6.8% | 6.6% | 7.3% | 7.3% |
| | Consumers pay-TV spend | 40.6% | 43.5% | 48.7% | 56.8% | 57.8% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |

T.3.20

## Relative importance of gross radio-TV revenues in the European Union (EUR 27) (Continued) 2006-2010

In % of total revenues.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|
| **PT** | TV adspend | 55.8% | 55.0% | 54.4% | 54.1% | 53.3% |
| | Radio-TV public income | 10.7% | 11.0% | 10.1% | 9.7% | 8.7% |
| | Radio adspend | 4.9% | 4.7% | 4.4% | 4.6% | 4.3% |
| | Consumers pay-TV spend | 28.5% | 29.4% | 31.1% | 31.6% | 33.7% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **RO** | TV adspend | 46.9% | 42.0% | 39.5% | 25.4% | 26.7% |
| | Radio-TV public income | 20.5% | 18.4% | 18.0% | 24.0% | 22.8% |
| | Radio adspend | 4.6% | 5.1% | 6.2% | 5.4% | 5.3% |
| | Consumers pay-TV spend | 28.1% | 34.4% | 36.3% | 45.3% | 45.2% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **SE** | TV adspend | 25.4% | 24.9% | 26.0% | 22.6% | 26.0% |
| | Radio-TV public income | 31.8% | 29.3% | 25.9% | 29.2% | 29.8% |
| | Radio adspend | 3.3% | 3.7% | 3.8% | 3.2% | 3.4% |
| | Consumers pay-TV spend | 39.5% | 42.2% | 44.2% | 44.9% | 40.8% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **SI** | TV adspend | 44.5% | 48.0% | 46.5% | 47.2% | 51.7% |
| | Radio-TV public income | 32.3% | 28.5% | 27.5% | 26.5% | 24.2% |
| | Radio adpsend | 4.8% | 4.4% | 4.5% | 4.2% | 3.5% |
| | Consumers pay-TV spend | 18.4% | 19.1% | 21.5% | 22.2% | 20.5% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| **SK** | TV adspend | 71.8% | 73.4% | 76.3% | 60.6% | 56.9% |
| | Radio-TV public income [2] | 10.2% | 8.2% | 6.6% | 11.3% | 10.6% |
| | Radio adspend | 3.6% | 3.5% | 3.4% | 5.4% | 5.6% |
| | Consumers pay-TV spend | 14.4% | 14.9% | 13.7% | 22.7% | 26.9% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |
| | | | | | | |
| **EUR 27** | TV adspend | 37.1% | 37.1% | 36.2% | 31.9% | 32.1% |
| | Radio-TV public income | 27.3% | 26.0% | 26.2% | 28.4% | 27.2% |
| | Radio adspend | 6.2% | 6.3% | 6.0% | 5.5% | 5.4% |
| | Consumers pay-TV spend | 29.3% | 30.5% | 31.6% | 34.2% | 35.4% |
| | ***Total*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** | ***100.0%*** |

[1] 2010 data estimated.
[2] Estimates.

Source: European Audiovisual Observatory

T.3.21

## Breakdown of revenues of public broadcasting organisations in the European Union (EUR 27) 2010 EUR million.

| Country | Channels | | Public revenues | Commercial revenues | Other revenues | Total | Public revenues | Commercial revenues | Other revenues |
|---|---|---|---|---|---|---|---|---|---|
| **AT** | ***Total*** (ORF) | TV+RAD | ***581.0*** | ***390.3*** | ***0.0*** | ***971.2*** | ***59.8%*** | ***40.2%*** | ***0.0%*** |
| **BE** | RTBF | TV+RAD | 211.8 | 63.6 | 19.2 | 294.6 | 71.9% | 21.6% | 6.5% |
| | VRT | TV+RAD | 303.2 | 137.3 | 12.4 | 452.9 | 66.9% | 30.3% | 2.7% |
| | BRF | TV+RAD | 5.4 | 0.7 | 0.4 | 6.3 | 85.7% | 11.1% | 6.3% |
| | ***Total*** | | ***520.4*** | ***201.6*** | ***32.0*** | ***753.8*** | ***69.0%*** | ***26.7%*** | ***4.2%*** |
| **BG** | BNT (2009) | TV | 37.8 | 3.4 | 0.0 | 41.1 | 92.0% | 8.3% | 0.0% |
| | BNR | RAD | 24.6 | 0.4 | 0.5 | 25.5 | 96.5% | 1.6% | 2.0% |
| | ***Total*** *prov.* | | ***62.4*** | ***3.8*** | ***0.5*** | ***66.6*** | ***93.7%*** | ***5.7%*** | ***0.8%*** |
| | | | | | | | | | – |
| **CY** | ***Total*** (CyBC) | TV+RAD | ***38.9*** | ***5.9*** | ***0.2*** | ***45.0*** | ***86.4%*** | ***13.1%*** | ***0.4%*** |
| **CZ** | CT | TV | 231.2 | 41.6 | 14.6 | 287.4 | 80.4% | 14.5% | 5.1% |
| | CR | RAD | 80.9 | 4.3 | 2.9 | 88.0 | 91.9% | 4.9% | 3.3% |
| | ***Total*** | | ***312.1*** | ***45.9*** | ***17.5*** | ***375.4*** | ***83.1%*** | ***12.2%*** | ***4.7%*** |
| **DE** | ARD | TV+RAD | 5 390.9 | 773.1 | 97.6 | 6 261.6 | 86.1% | 12.3% | 1.6% |
| | ZDF | TV | 1 742.9 | 287.5 | -64.4 | 1 965.9 | 88.7% | 14.6% | -3.3% |
| | Deutsche Welle | TV+RAD | 291.4 | 9.8 | 0.2 | 301.2 | 96.7% | 3.3% | 0.1% |
| | Deutschlandsradio | RAD | 192.4 | 13.7 | 3.5 | 209.6 | 91.8% | 6.5% | 1.7% |
| | ***Total*** | TV+RAD | ***7 617.6*** | ***1 084.1*** | ***36.9*** | ***8 738.3*** | ***87.2%*** | ***12.4%*** | ***0.4%*** |
| **DK** | DR | TV+RAD | 465.7 | – | 49.0 | 514.8 | 90.5% | – | 9.5% |
| | TV2 (cons.) | TV | – | 275.8 | 10.5 | 286.3 | – | 96.3% | 3.7% |
| | ***Total*** | | ***465.7*** | ***275.8*** | ***59.5*** | ***801.1*** | ***58.1%*** | ***34.4%*** | ***7.4%*** |
| **EE** | ***Total*** (ERR) | TV+RAD | ***24.4*** | ***2.6*** | ***1.3*** | ***28.4*** | ***85.9%*** | ***9.2%*** | ***4.6%*** |
| **ES** | RTVE | TV+RAD | 1 110.0 | 15.1 | 10.0 | 1 136.4 | 97.7% | 1.3% | 0.9% |
| | Autonomicas *est.* | TV+RAD | 738.9 | 207.2 | – | 946.1 | 78.1% | 21.9% | – |
| | ***Total*** *est.* | | ***1 848.9*** | ***222.3*** | ***10.0*** | ***2 082.5*** | ***88.8%*** | ***10.7%*** | ***0.5%*** |
| **FI** | ***Total*** (YLE) | TV+RAD | ***398.4*** | ***0.0*** | ***21.7*** | ***420.1*** | ***94.8%*** | ***0.0%*** | ***5.2%*** |
| **FR** | France Télévisions | TV | 2 472.7 | 664.0 | 119.6 | 3 256.4 | 75.9% | 20.4% | 3.7% |
| | Arte France | TV | 228.9 | 7.2 | 7.5 | 243.6 | 94.0% | 3.0% | 3.1% |
| | Audiovisuel extérieur de la France | TV+RAD | 240.1 | 6.7 | 12.3 | 259.2 | 92.6% | 2.6% | 4.7% |
| | Chaîne parlementaire AP | TV | 16.5 | – | – | 16.5 | 100.0% | – | – |
| | Chaîne parlementaire Sénat | TV | 15.3 | – | – | 15.3 | 100.0% | – | – |
| | Radio France | RAD | 549.6 | 63.7 | 18.6 | 631.9 | 87.0% | 10.1% | 2.9% |
| | ***Total*** | | ***3 523.1*** | ***741.6*** | ***158.0*** | ***4 422.9*** | ***79.7%*** | ***16.8%*** | ***3.6%*** |
| **GB** | BBC Group | TV+RAD | 4 420.5 | 1 419.0 | 181.5 | 6 021.0 | 73.4% | 23.6% | 3.0% |
| | Channel 4 Group | TV | – | 1 095.7 | | 1 095.7 | – | 100.0% | 0.0% |
| | S4C | TV | 119.2 | 3.1 | – | 122.3 | 97.5% | 2.5% | |
| | Services Sound and Vision Corporation *est.* | TV+RAD | 44.6 | – | – | 44.6 | 100.0% | | |
| | ***Total*** | | ***4 584.3*** | ***2 517.8*** | ***181.5*** | ***7 283.6*** | ***62.9%*** | ***34.6%*** | ***2.5%*** |
| **GR** | ***Total*** (ERT) | TV+RAD | ***352.4*** | ***28.9*** | ***4.7*** | ***386.0*** | ***91.3%*** | ***7.5%*** | ***1.2%*** |

T.3.21

## Breakdown of revenues of public broadcasting organisations (Continued) in the European Union (EUR 27) 2010 EUR million.

| Country | Channels | | Public revenues | Commercial revenues | Other revenues | Total | Public revenues | Commercial revenues | Other revenues |
|---|---|---|---|---|---|---|---|---|---|
| **HU** | Magyar Televizio | TV | 66.2 | 12.1 | 1.7 | 79.9 | 82.9% | 15.1% | 2.1% |
| | Duna (2009) | TV | 33.0 | 2.4 | – | 35.4 | 93.2% | 6.8% | |
| | Magyar Radio | RAD | 44.8 | 4.5 | 6.3 | 55.6 | 80.6% | 8.1% | 11.3% |
| | ***Total*** | | ***144.0*** | ***19.0*** | ***8.0*** | ***170.9*** | ***84.3%*** | ***11.1%*** | ***4.7%*** |
| **IE** | ***Total*** (RTE) | TV+RAD | ***196.0*** | ***175.7*** | ***0.0*** | ***371.7*** | ***52.7%*** | ***47.3%*** | ***0.0%*** |
| **IT** | ***Total*** (RAI) | TV+RAD | ***1 771.7*** | ***1 259.0*** | ***9.2*** | ***3 039.9*** | ***58.3%*** | ***41.4%*** | ***0.3%*** |
| **LT** | ***Total*** (LRT) | TV+RAD | ***10.2*** | ***4.6*** | ***2.4*** | ***17.2*** | ***59.3%*** | ***26.7%*** | ***14.0%*** |
| **LU** | ***Total*** (Chaîne parlementaire) | TV | ***0.6*** | ***0.0*** | ***0.0*** | ***0.6*** | ***100.0%*** | | |
| **LV** | LTV | TV | 10.0 | 4.4 | 1.2 | 15.6 | 64.1% | 28.2% | 7.7% |
| | LR | RAD | 5.6 | 1.1 | 0.1 | 6.8 | 82.4% | 16.2% | 1.5% |
| | ***Total*** | | ***15.6*** | ***5.5*** | ***1.3*** | ***22.4*** | ***69.6%*** | ***24.6%*** | ***5.8%*** |
| **MT** | ***Total*** (PBS) | TV+RAD | ***2.2*** | ***6.0*** | ***0.0*** | ***8.2*** | ***26.8%*** | ***73.2%*** | ***0.0%*** |
| **NL** | NPO | TV+RAD | 771.3 | 85.9 | | 857.2 | 90.0% | 10.0% | 0.0% |
| | NRW *est.* | TV+RAD | 46.4 | | 0.9 | 47.3 | 98.1% | 0.0% | 1.9% |
| | ***Total*** | | ***817.7*** | ***85.9*** | ***0.9*** | ***904.5*** | ***90.4%*** | ***9.5%*** | ***0.1%*** |
| **PL** | TVP | TV | 61.9 | 356.7 | 38.9 | 457.5 | 13.5% | 78.0% | 8.5% |
| | PR (2009) | RAD | 43.7 | 15.5 | 2.1 | 61.3 | 71.3% | 25.3% | 3.4% |
| | ***Total*** *prov.* | | ***105.6*** | ***372.2*** | ***41.0*** | ***518.8*** | ***20.4%*** | ***71.7%*** | ***7.9%*** |
| **PT** | ***Total*** (RTP) | TV+RAD | ***230.6*** | ***75.8*** | ***2.2*** | ***308.6*** | ***74.7%*** | ***24.6%*** | ***0.7%*** |
| **RO** | TVR | TV | 113.4 | 17.3 | 2.7 | 133.4 | 85.0% | 13.0% | 2.0% |
| | SRR | RAD | 91.7 | 1.0 | 1.6 | 94.3 | 97.2% | 1.1% | 1.7% |
| | ***Total*** | TV+RAD | ***205.1*** | ***18.3*** | ***4.3*** | ***227.7*** | ***90.1%*** | ***8.0%*** | ***1.9%*** |
| **SE** | SVT | TV | 431.9 | 0.0 | 31.7 | 463.5 | 93.2% | 0.0% | 6.8% |
| | SR | RAD | 262.4 | 0.0 | 6.5 | 269.1 | 97.5% | 0.0% | 2.4% |
| | UR | TV+RAD | 37.8 | 0.0 | 2.0 | 39.8 | 95.0% | 0.0% | 5.0% |
| | ***Total*** | | ***732.1*** | ***0.0*** | ***40.2*** | ***772.4*** | ***94.8%*** | ***0.0%*** | ***5.2%*** |
| **SI** | ***Total*** (RTVSLO) | TV+RAD | ***95.2*** | ***20.5*** | ***7.3*** | ***123.0*** | ***77.4%*** | ***16.7%*** | ***5.9%*** |
| **SK** | STV (2009) | TV | 63.3 | 7.3 | 0.4 | 71.0 | 89.2% | 10.3% | 0.6% |
| | SR | RAD | 27.3 | 1.8 | 0.9 | 30.0 | 91.0% | 6.0% | 3.0% |
| | ***Total*** *prov.* | | ***90.6*** | ***9.1*** | ***1.3*** | ***101.0*** | ***89.7%*** | ***9.0%*** | ***1.3%*** |
| ***EUR 27*** | ***Total*** | | ***24 746.8*** | ***7 572.2*** | ***641.9*** | ***32 961.8*** | ***75.1%*** | ***23.0%*** | ***1.9%*** |

Source: European Audiovisual Observatory

Chapter
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4

# Advertising

# Publicité

# *Werbung*

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## Results for 2010: the recovery

According to data published by Warc, total major media ad spend in the European Union reached EUR 88.8 billion in 2010. The market was accordingly staging a recovery, with growth of 6.8% compared with 2009, although the figure was lower than for 2008 and even for 2006. The growth was driven by the internet (+17.4%), followed by the cinema industry (+13%) and television (+9.6%). Press ad spend posted weak growth (1.1%), while magazine ad spend remained in recession (-0.2%).

Growth in Greater Europe was stronger than in the European Union (+ 8.6%). Owing to the weakening of the euro and the fact that the recovery was stronger in the overall economy, it was the countries outside the eurozone that enjoyed the strongest growth: +39.2% in Turkey, +27% in Russia +25.9% in Sweden, +19.8% in Poland, +16.4% in Switzerland, +16.1% in Norway and +13.2% in the United Kingdom. Within the eurozone, the best growth was obtained by Austria (+7.2%), Belgium (6.7%) and Finland (6.4%). Germany (+5.7%), France (+4.9%) Italy (+4.1%) and Spain (+4.1%) had lower growth rates that the EU average. The recession continued in Lithuania (-0.9%), Ireland (-1.3%) and Bulgaria (-2.7%)

### First estimates for 2011: strong growth in Russia, weak growth in Germany, France and the United Kingdom and recession in Italy.

**Germany:** According to a Nielsen report, major media ad spend increased by 3.5% and reached EUR 25.8 billion. Growth was 5% in the first half of the year but fell back to 2.1% in the second. The growth was driven by ad spend such as that of Deutsche Telekom to announce the launch of its cloud computing service or Apple to launch the iPad 2. The growth of internet ad spend was particularly strong (+22.5%), especially at portals such as Preis24.de and MyVideo. Television advertising grew by 1.8% to nearly EUR 11.1 billion. Sending on radio advertising was EUR 1.4 billion, an increase of 3.9% over 2010. Warc provides a lower growth estimate (+2.5%) but confirms the key role of internet ad spend (+13.1%). The growth in TV ad spend is estimated at 2%.

**France:** According to the Advertising Market Barometer (produced by Kantar Media for CNC) [1] gross ad spend in multiple media grew by 5.2% in 2011 and reached EUR 27.8 billion. The growth was half that in 2010 (+10.2%). All media posted increases throughout the year with the exception of outdoor

## Résultats 2010 : la reprise

Selon les données publiées par Warc, les investissements publicitaires grands médias dans l'Union européenne ont atteint en 2010 88,8 milliards EUR. Le marché a ainsi connu une reprise, avec une croissance de 6,8 % par rapport à 2009, mais est resté inférieur aux résultats de 2008 et même de 2006. Internet a tiré la croissance (+17,4 %), suivi par le cinéma (+13 %) et la télévision (+9,6 %). Les investissements presse ont eu une croissance faible (1,1 %) tandis que les investissements dans les magazines restaient en récession (-0,2 %).

La croissance pour la grande Europe a été plus forte que celle de l'Union européenne (+8,6 %). En raison de l'affaiblissement de l'euro mais aussi en raison de la plus grande amplitude de la reprise de l'ensemble de l'économie, ce sont les pays hors zone euro qui ont connu la croissance la plus forte : +39,2 % en Turquie, +27 % en Russie, +25,9 % en Suède, +19,8 % en Pologne, +16,4 % en Suisse, +16,1 % en Norvège, +13,2 % au Royaume-Uni. Au sein de la zone euro, les meilleures croissances ont été obtenues par l'Autriche (+7,2 %), la Belgique (+6,7 %) et la Finlande (+6,4 %). L'Allemagne (+5,7 %), la France (+4,9 %) l'Italie (+4,1%) et l'Espagne (+4,1%) ont eu des taux de croissance inférieurs à la moyenne de l'Union européenne. La récession a continué en Lituanie (-0,9 %), en Irlande (-1,3 %) et en Bulgarie (-2,7 %).

### Premières estimations pour l'année 2011 : forte croissance en Russie, croissance faible en Allemagne, en France, au Royaume-Uni, récession en Italie.

**Allemagne :** Selon un rapport de Nielsen, les dépenses publicitaires grands médias ont augmenté de 3,5 % pour atteindre 25,8 milliards EUR. La croissance a été de 5 % pendant le premier semestre mais est retombée à 2,1% durant le deuxième semestre. Des investissements comme ceux de Deutsche Telekom pour annoncer le lancement du « cloud computing » ou de Apple pour lancer l'iPad 2 ont tiré la croissance. La croissance des investissements sur internet a été particulièrement forte (+22,5 %), en particulier sur des portails tels que Preis24.de et MyVideo. La publicité télévisée a cru de 1,8 % à près de 11,1 milliards EUR. La radio a généré des investissements de 1,4 milliards EUR, soit une augmentation de 3,9 % par rapport à 2010. Warc propose une estimation de croissance moins élevée (+2,5 %) mais confirme le rôle moteur des investissements sur internet (+13,1%). La croissance des investissements TV est estimée à 2 %.

## Ergebnisse 2010: Erholung

Nach Daten von Warc erreichten die Werbeinvestitionen in die Massenmedien in der Europäischen Union 2010 den Betrag von 88,8 Mrd. EUR. So kam es in diesem Markt mit einem Wachstum von 6,8 % gegenüber 2009 zu einer Erholung, auch wenn die Zahlen noch unter denen von 2008 und sogar 2006 lagen. Treibende Kraft war das Internet (+17,4 %), gefolgt von Kino (+13 %) und Fernsehen (+9,6 %). Die Investitionen in die Presse sind schwach gestiegen (+1,1 %), während die Investitionen in Magazine rückläufig blieben (-0,2 %).

Das Wachstum war in Gesamteuropa stärker als in der Europäischen Union (+8,6 %). Aufgrund der Schwächung des Euros, aber auch wegen der umfangreicheren Erholung der Gesamtwirtschaft verzeichneten die Länder außerhalb der Eurozone das stärkste Wachstum: +39,2 % in der Türkei, +27 % in Russland, +25,9 % in Schweden, +19,8 % in Polen, +16,4% in der Schweiz, +16,1% in Norwegen, +13,2 % im Vereinigten Königreich. Das beste Wachstum innerhalb der Eurozone erzielten Österreich (+7,2 %), Belgien (6,7 %) und Finnland (6,4 %). Unterhalb des EU-Durchschnitts lag die Wachstumsrate in Deutschland (+5,7 %), Frankreich (+4,9 %), Italien (+4,1 %) und Spanien (+4,1 %). Die Rezession setzte sich in Litauen (-0,9 %), Irland (-1,3 %) und Bulgarien (-2,7 %) fort.

### *Erste Schätzungen für 2011: Starkes Wachstum in Russland, schwaches Wachstum in Deutschland, Frankreich und im Vereinigten Königreich, Rezession in Italien.*

**Deutschland:** Nach einem Bericht von Nielsen stiegen die Werbeinvestitionen in die Massenmedien um 3,5 % auf 25,8 Mrd. EUR an. Das Wachstum lag im ersten Halbjahr bei 5 %, fiel im zweiten Halbjahr aber wieder auf 2,1 %. Investitionen wie die der Deutschen Telekom zur Ankündigung der Einführung von „Cloud Computing" oder die von Apple zum Verkaufsstart des iPad 2 haben das Wachstum beschleunigt. Die Investitionen im Internet nahmen besonders stark zu (+22,5 %), insbesondere auf Portalen wie Preis24.de und MyVideo. Die Fernsehwerbung legte um 1,8 % auf fast 11,1 Mrd. EUR zu. Der Hörfunk generierte Investitionen von 1,4 Mrd. EUR, ein Anstieg um 3,9 % gegenüber 2010. Nach Schätzungen von Warc ist das Wachstum zwar etwas niedriger (+2,5 %), die Internetinvestitionen gelten aber auch hier als Motor (+13,1 %). Das Wachstum der Investitionen im Fernsehen wird mit 2 % veranschlagt.

[1] *Baromètre du marché publicitaire*, CNC, 27 Janvier 2012.

advertising (-0.6%). Television advertising, which went up by 6%, was the main engine of advertising market growth and was the primary advertising medium for the third year in a row, with a 33.7% market share. Spending on radio advertising grew by 6.2% and internet advertising by 1.5%. According to the Institute for Advertising Research and Studies (IREP) [2], which provides net data, advertisers' communication expenditure rose by 1.9% last year to EUR 31.4 billion. The media did not benefit much from this growth as their income remained stable (+0.1%, to EUR 10.7 billion), after growing by 1.9% in 2010 and falling by 12.6% in 2009. The internet enjoyed the strongest growth (14% of display advertising revenue), whereas television recorded an increase of 1.6%, to a large extent due to the new channels, the revenue of which rose by 18%, while that of the incumbent channels fell at the same time by 1.8%.

**Italy:** According to figures supplied by Warc, ad spend was in decline by 4.2%. The growth of internet ad spend (+11%) did not compensate for the decline in the case of the other media (press: -10.9%, radio: -11.9%, cinema: -19%, television: -3.8%).

**United Kingdom:** According to the Advertising Association and Warc, the British advertising market posted growth of 1.7% in 2011. Internet ad spend rose by 10.6%, radio by 3.9% and television by 1.8%.

**Russia:** According to figures supplied by Warc, ad spend in Russia increased by 25.5%, driven here too by the internet (+50.1%) but also by television (+27.5%) and the cinema (+ 24.9%).

## Forecasts for 2012 and 2013

**Global market:** According to the agency Carat, the global advertising market will probably grow by 6% in 2012 and 5.8% in 2013. Television advertising revenues are set to increase by 5.5% in 2012 and 5.3% in 2013, while the internet ad spend growth rate will be significantly higher: after growth estimated at 15.5% in 2011, the figures are likely to be 16.5% in 2012 and 13.5% in 2013. According to the forecasts of the agency Aegis Group, global online advertising revenues will overtake those for press advertising in 2013 for the first time. [3]

**Germany:** According to forecasts produced by Warc, ad spend will be lower in 2012 than in 2011 (+1% against +2.5%), while internet ad spend growth is likely to weaken to +8.9% and TV ad spend to +1.4%.

**France :** Selon le *Baromètre du marché publicitaire* réalisé par Kantar Media pour le CNC [1] les investissements publicitaires bruts plurimédias ont été en croissance de 5,2 % en 2011, atteignant 27,8 milliards EUR. La croissance diminue de moitié par rapport à 2010 (+10,2 %). Tous les médias sont en progression sur l'ensemble de l'année à l'exception de la publicité extérieure (-0,6 %). La télévision, en croissance de 6 %, est le principal moteur de la croissance du marché publicitaire et, pour la troisième année consécutive, est le premier support publicitaire avec 33,7 % de parts de marché. Les investissements radio ont connu une croissance de 6,2 % et les investissements sur internet une croissance de 1,5 %. Selon l'IREP [2], qui fournit des données nettes, les dépenses de communication des annonceurs ont progressé de 1,9 % l'an dernier à 31,4 milliards EUR. Les médias ont peu profité de cette croissance, puisque leurs recettes sont restées stables (+0,1 %, à 10,7 milliards EUR), après avoir progressé de 1,9 % en 2010 et chuté de 12,6 % en 2009. Internet a connu la croissance la plus forte (14 % des recettes du *display*) tandis que la télévision a connu une progression de 1,6 %, en grande partie grâce aux nouvelles chaînes, dont les recettes ont progressé de 18 % alors que celles des chaînes historiques reculaient dans le même temps de 1,8 %.

**Italie :** Selon les prévisions de Warc, les investissements publicitaires auraient été en récession de 4,2 %. La croissance des investissements sur internet (+11%) n'aurait pas compensé la récession sur les autres médias (-10,9 % pour la presse, -11,9% pour la radio, -19 % pour le cinéma, -3,8 % pour la télévision).

**Royaume-Uni :** Selon l'Advertising Association et Warc, la croissance du marché publicitaire britannique en 2011 a été de 1,7%. Les investissements sur internet auraient augmenté de 10,6 %, ceux en radio de 3,9 % et ceux en télévision de 1,8 %.

**Russie :** Selon les prévisions de Warc, les investissements publicitaires en Russie auraient augmenté de 25,5 %, ici aussi tirés par internet (+50,1 %) mais également par la télévision (+27,5 %) et le cinéma (+24,9 %).

## Prévisions pour 2012 et 2013

**Marché mondial :** Selon l'agence Carat, le marché mondial de la publicité devrait connaître une croissance de 6 % en 2012 et de 5,8 % en 2013. Les revenus publicitaires de la télévision devraient croître de 5,5 % en 2012 et de 5,3 % en 2013. Le taux de croissance des investissements publicitaires sur internet serait nettement

**Frankreich:** Nach dem von Kantar Media für den CNC erstellten *Baromètre du marché publicitaire* [1] sind die medienübergreifenden Bruttowerbeinvestitionen 2011 um 5,2 % auf 27,8 Mrd. EUR angestiegen. Gegenüber 2010 (+10,2 %) ist das ein Einbruch von 50 %. Das Wachstum betraf alle Medien ganzjährig, mit Ausnahme der Außenwerbung (-0,6 %). Das Fernsehen war mit einem Anstieg von 6 % der wichtigste Wachstumsmotor für den Werbemarkt und im dritten Jahr hintereinander der Hauptwerbeträger mit einem Marktanteil von 33,7 %. Die Werbeinvestitionen im Radio stiegen um 6,2 % und im Internet um 1,5 %. Nach den von IREP bereitgestellten Nettodaten [2] stiegen die Ausgaben der Werbekunden im vergangenen Jahr um 1,9 % auf 31,4 Mrd. EUR. Die Medien profitierten davon wenig, da ihre Einnahmen stabil blieben (10,7 Mrd. EUR, +0,1 %), nachdem sie 2010 um 1,9 % zulegten und 2009 um 12,6 % abstürzten. Das Internet verzeichnete das stärkste Wachstum (14 % der Einnahmen aus der Bannerwerbung), während es im Fernsehen zu einem Anstieg von 1,6 % kam, zum Großteil dank der neuen Sender, deren Einnahmen um 18 % stiegen, während die der etablierten Sender im selben Zeitraum um 1,8 % sanken.

**Italien:** Nach den Prognosen von Warc sind die Werbeinvestitionen um 4,2 % gesunken. Der Anstieg der Investitionen im Internet (+11 %) habe nicht den Rückgang in anderen Medien kompensiert (-10,9 % in der Presse, -11,9 % im Radio, -19 % im Kino, -3,8 % im Fernsehen).

**Vereinigtes Königreich:** Nach Angaben von Advertising Association und Warc lag das Wachstum des britischen Werbemarktes 2011 bei 1,7 %. Die Investitionen im Internet seien um 10,6 % gestiegen, im Radio um 3,9 % und im Fernsehen um 1,8 %.

**Russland:** Nach den Prognosen von Warc sind die Werbeinvestitionen in Russland um 25,5 % gestiegen, was ebenfalls auf das Internet (+50,1 %), aber auch auf Fernsehen (+27,5 %) und Kino (+24,9 %) zurückzuführen sei.

## *Prognosen für 2012 und 2013*

**Weltmarkt:** Nach Angaben der Agentur Carat dürfte der weltweite Werbemarkt 2012 ein Wachstum von 6 % und 2013 von 5,8 % erreichen. Die Werbeeinnahmen beim Fernsehen sollen 2012 um 5,5 % und 2013 um 5,3 % zulegen. Die Wachstumsrate der Werbeinvestitionen im Internet soll deutlich höher liegen: Nach einem geschätzten Wachstum von 15,5 % 2011 dürften 2012 16,5 % und

[2] *Les Echos*, 15 March 2012.
[3] *Financial Times*, 15 March 2012.

**France:** According to the Advertising Market Barometer produced by Kantar Media for CNC, ad spend increased by 2.9% in January 2012 compared with January 2011. Television is the principal engine of growth (+10.2%), followed by radio (+2.8%) and the internet (+2.3%). 4 At 37.3%, the advertising market share achieved by television has reached its highest historical level. The experts from Kantar Media and IREP forecast that the market will stabilise in 2012, with an increase limited to 0.8%.

**United Kingdom:** In March 2012, the agency ZenithOptimedia revised its growth forecasts for the British advertising market in 2012, which it estimates at 3.2% (against 3.7% in December 2011). In the first quarter 2012, growth was 1% lower than in the first quarter 2011. The growth forecast for TV ad spend in 2012 is 1%. 5 Warc and the Advertising Association forecast growth of 4,2 %, driven by the internet (7.8%), outdoor advertising (6%) and radio (4.4%), while TV ad spend growth will remain weak at 2.5%.

**Russia:** Warc forecasts slower growth but it is nonetheless substantial (+16.5%) and is still driven by the internet (+ 29.1%) and television (+ 27.5%).

plus élevé : après une croissance estimée à 15,5 % en 2011, on devrait assister à une croissance de 16,5 % en 2012 et de 13,5 % en 2013. Selon les prévisions de l'agence Aegis Group, au niveau mondial, les recettes publicitaires en ligne vont dépasser celles de la presse écrite pour la première fois en 2013. 3

**Allemagne :** Selon les prévisions de Warc, la croissance des investissements serait inférieure en 2012 à celle de 2011 (+1 %, contre +2,5 %). La croissance des investissements sur internet devrait faiblir à +8,9 % et celle des investissements TV à +1,4 %.

**France :** Selon le Baromètre du marché publicitaire réalisé par Kantar Media pour le CNC, les investissements publicitaires ont augmenté de 2,9 % en janvier 2012 par rapport à janvier 2011. La télévision est le principal moteur de la croissance (+10,2 %), suivie par la radio (+2,8 %) et internet (+2,3 %). 4 A 37,3 %, la part de marché publicitaire de la télévision atteint son plus haut niveau historique. Les experts de Kantar Media et de l'IREP prévoient pour 2012 une stabilisation du marché, avec une hausse limitée à 0,8 %.

**Royaume-Uni :** En mars 2012, l'agence ZenithOptimedia a revu à la baisse ses prévisions pour la croissance du marché publicitaire britannique en 2012, estimée à 3,2 % (contre 3,7 % en décembre 2011). Au premier trimestre 2012, la croissance a été de 1 % inférieure à celle du premier trimestre 2011. La croissance prévue pour les investissements TV en 2012 est de 1 %. 5 Warc et l'Advertising Association prévoient quant à eux une croissance de 4,2 %, tirée par internet (7,8 %), l'affichage extérieur (6 %) et la radio (4,4 %), tandis que la croissance des investissements TV resterait faible à 2,5 %.

**Russie :** Warc prévoit un ralentissement de la croissance, mais celle-ci resterait substantielle (+16,5 %), toujours tirée par internet (+29,1 %) et par la télévision (+27,5 %).

2013 13,5 % erreicht werden. Nach den Prognosen der Agentur Aegis Group werden 2013 die Einnahmen aus der Onlinewerbung zum ersten Mal höher liegen als bei den Printmedien. 3

**Deutschland:** Nach den Prognosen von Warc soll das Investitionswachstum 2012 unter dem von 2011 liegen: (+1 % gegenüber +2,5 %). Im Internet dürfte sich das Wachstum abschwächen auf +8,9 %, im Fernsehen auf +1,4 %.

**Frankreich:** Nach dem von Kantar Media für den CNC erstellten Baromètre du marché publicitaire sind die Werbeinvestitionen im Januar 2012 um 2,9 % gegenüber dem Vorjahresmonat gestiegen. Treibende Kraft war das Fernsehen (+10,2 %), gefolgt vom Hörfunk (+2,8 %) und vom Internet (+2,3 %). 4 Mit 37,3 % hat der Werbemarktanteil des Fernsehens einen historischen Höchststand erreicht. Die Experten von Kantar Media und IREP erwarten für 2012 eine Stabilisierung des Marktes mit einem Wachstum von bis zu 0,8 %.

**Vereinigtes Königreich:** Im März 2012 korrigierte die Agentur ZenithOptimedia ihre Wachstumsprognosen für den britischen Werbemarkt 2012 mit 3,2 % nach unten (gegenüber 3,7 % im Dezember 2011). Im ersten Quartal 2012 lag das Wachstum 1 % unter dem Quartal des Vorjahres. Bei den Fernsehinvestitionen wird für 2012 mit einem Anstieg um 1 % gerechnet. Warc und Advertising Association erwarten ein Wachstum von 4,2 %, verursacht durch das Internet (7,8 %), Plakatwerbung (6 %) und Radio (4,4 %), während der Anstieg bei den Fernsehinvestitionen auf schwachem Niveau bei 2,5 % bleiben soll.

**Russland:** Warc prognostiziert ein langsameres Wachstum, das jedoch substanziell bleiben soll (+16,5 %), weiterhin dank Internet (+29,1 %) und Fernsehen (+27,5 %).

4 *Baromètre du marché publicitaire*, CNC, 24 February 2012.
5 *Marketing Week*, 14 March 2012.
Source: European Audiovisual Observatory

T.4.1
G.4.1

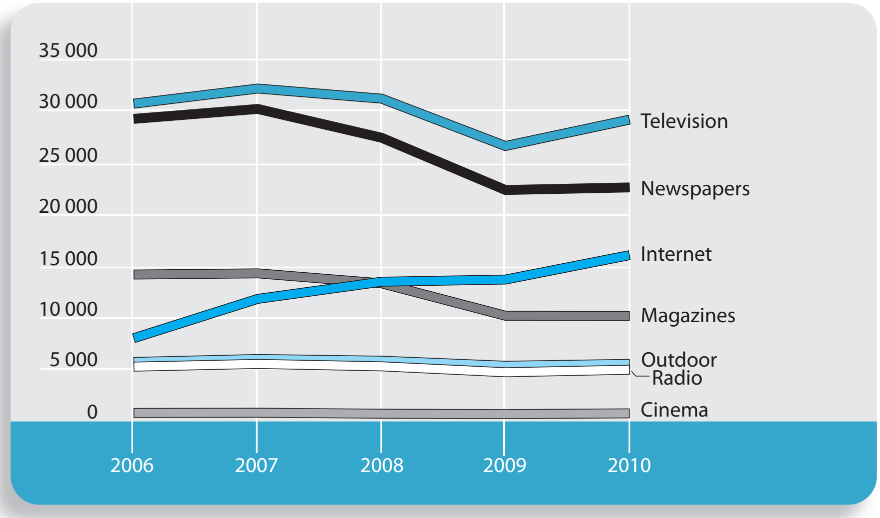
# Breakdown of the display adspend in the European Union (EUR 27) 2006-2010

EUR million.

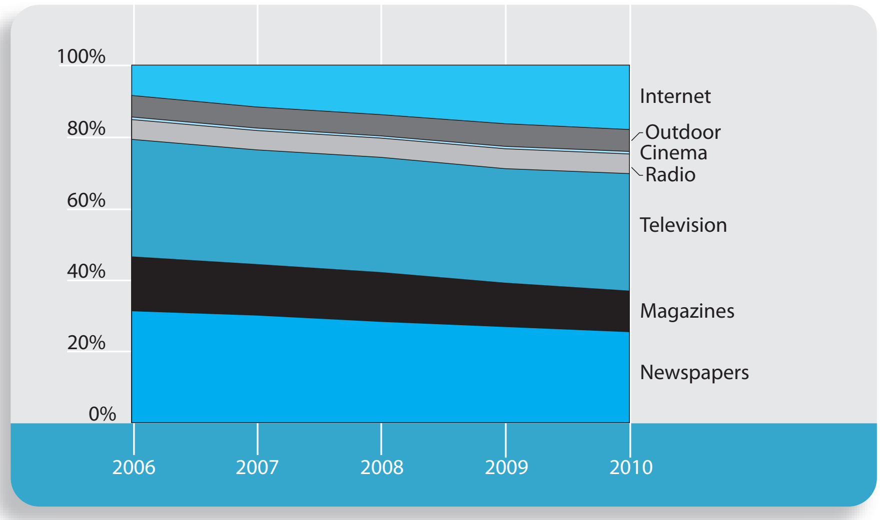
| | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|
| **Newspapers** | 29 250 | 30 214 | 27 415 | 22 339 | 22 592 | ***1.1%*** |
| **Magazines** | 14 124 | 14 239 | 13 270 | 10 121 | 10 101 | ***-0.2%*** |
| **Television** | 30 728 | 32 196 | 31 214 | 26 612 | 29 170 | ***9.6%*** |
| **Radio** | 5 176 | 5 439 | 5 205 | 4 629 | 4 875 | ***5.3%*** |
| **Cinema** | 678 | 698 | 602 | 563 | 636 | ***13.0%*** |
| **Outdoor** | 5 630 | 5 918 | 5 753 | 5 260 | 5 441 | ***3.5%*** |
| **Internet** | 7 945 | 11 760 | 13 427 | 13 637 | 16 004 | ***17.4%*** |
| ***TOTAL*** | ***93 530*** | ***100 464*** | ***96 887*** | ***83 161*** | ***88 820*** | ***6.8%*** |

| % | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| **Newspapers** | 31.3 | 30.1 | 28.3 | 26.9 | 25.4 |
| **Magazines** | 15.1 | 14.2 | 13.7 | 12.2 | 11.4 |
| **Television** | 32.9 | 32.0 | 32.2 | 32.0 | 32.8 |
| **Radio** | 5.5 | 5.4 | 5.4 | 5.6 | 5.5 |
| **Cinema** | 0.7 | 0.7 | 0.6 | 0.7 | 0.7 |
| **Outdoor** | 6.0 | 5.9 | 5.9 | 6.3 | 6.1 |
| **Internet** | 8.5 | 11.7 | 13.9 | 16.4 | 18.0 |

Source: European Audiovisual Observatory on data provided by WARC and IP




EUR million.




In %.

2 3 4 5 6 7 8 9

T.4.2

# Total display adspend in Europe

## 2006-2010

EUR million at current prices and exchange rates, net of discounts. Data include agency commission and Internet but exclude production costs, classified advertising, direct mail and directories.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| AT | 2 440 | 2 832 | 2 993 | 2 979 | 3 195 | 7.2% |
| BE | 2 472 | 2 697 | 2 737 | 2 749 | 2 934 | 6.7% |
| BG | 281 | 353 | 381 | 331 | 322 | -2.7% |
| CH | 2 424 | 2 449 | 2 500 | 2 289 | 2 664 | 16.4% |
| CY | 74 | 84 | 89 | 95 | 85 | -10.4% |
| CZ | 670 | 764 | 886 | 789 | 882 | 11.8% |
| DE | 18 215 | 19 204 | 19 169 | 17 391 | 18 377 | 5.7% |
| DK | 1 760 | 1 885 | 1 809 | 1 507 | 1 553 | 3.1% |
| EE | 87 | 115 | 111 | 71 | 66 | -7.0% |
| ES | 7 307 | 7 998 | 7 007 | 5 643 | 5 874 | 4.1% |
| FI | 1 383 | 1 514 | 1 543 | 1 323 | 1 408 | 6.4% |
| FR | 12 467 | 13 288 | 13 188 | 11 521 | 12 089 | 4.9% |
| GB | 20 959 | 22 200 | 18 651 | 14 711 | 16 650 | 13.2% |
| GR | 1 716 | 1 966 | 1 953 | 1 950 | 1 597 | -18.1% |
| HR | 222 | 241 | 285 | 242 | 222 | -8.3% |
| HU | 870 | 937 | 990 | 771 | 804 | 4.3% |
| IE | 1 457 | 1 626 | 1 579 | 1 224 | 1 208 | -1.3% |
| IT | 9 060 | 9 511 | 9 616 | 8 468 | 8 817 | 4.1% |
| LT | 125 | 144 | 157 | 95 | 94 | -0.9% |
| LU (1) | 112 | 121 | 120 | 130 | 134 | 3.3% |
| LV | 109 | 134 | 138 | 75 | 65 | -13.6% |
| MK | 85 | 124 | 169 | 182 | 210 | 15.4% |
| MT | 30 | 31 | 29 | 26 | 27 | 0.8% |
| NL | 4 079 | 4 380 | 4 312 | 3 815 | 4 004 | 5.0% |
| NO | 1 795 | 2 036 | 2 020 | 1 778 | 2 064 | 16.1% |
| PL | 1 647 | 1 949 | 2 304 | 1 760 | 2 108 | 19.8% |
| PT | 1 929 | 1 997 | 2 041 | 2 066 | 2 156 | 4.4% |
| RO | 746 | 767 | 795 | 403 | 429 | 6.5% |
| RU | 4 873 | 6 101 | 7 604 | 4 602 | 5 844 | 27.0% |
| SE | 2 682 | 2 874 | 2 856 | 2 245 | 2 826 | 25.9% |
| SI | 229 | 283 | 298 | 305 | 332 | 8.6% |
| SK | 625 | 806 | 1 133 | 756 | 786 | 4.0% |
| TR | 1 537 | 1 920 | 1 782 | 1 404 | 1 955 | 39.2% |
| *EUR 27* | *93 529* | *100 459* | *96 884* | *83 199* | *88 820* | *6.8%* |
| *EUR 33* | *104 465* | *113 330* | *111 244* | *93 696* | *101 780* | *8.6%* |

(1) Gross advertising expenditure. Source: IP Key facts.

Source : WARC (except for LU) / European Audiovisual Observatory

Data from WARC are provided in national currency and converted in EUR by the Observatory.

T.4.3

## Total adspend in Europe as a percentage of GDP 2006-2010

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/06 |
|---|---|---|---|---|---|---|
| **AT** | 0.96% | 1.05% | 1.08% | 1.10% | 1.14% | ***0.18%*** |
| **BE** | 0.79% | 0.82% | 0.81% | 0.82% | 0.84% | ***0.05%*** |
| **BG** | 1.13% | 1.25% | 1.17% | 0.99% | 0.92% | ***-0.21%*** |
| **CH** | 0.78% | 0.76% | 0.77% | 0.68% | 0.73% | ***-0.05%*** |
| **CY** | ~ | ~ | ~ | ~ | ~ | ***~*** |
| **CZ** | 0.60% | 0.61% | 0.65% | 0.54% | 0.61% | ***0.01%*** |
| **DE** | 0.79% | 0.80% | 0.78% | 0.74% | 0.75% | ***-0.04%*** |
| **DK** | 0.82% | 0.85% | 0.80% | 0.68% | 0.68% | ***-0.14%*** |
| **EE** | 0.71% | 0.80% | 0.72% | 0.51% | 0.47% | ***-0.24%*** |
| **ES** | 0.77% | 0.78% | 0.66% | 0.54% | 0.56% | ***-0.21%*** |
| **FI** | 0.84% | 0.87% | 0.85% | 0.78% | 0.78% | ***-0.06%*** |
| **FR** | 0.71% | 0.72% | 0.70% | 0.61% | 0.63% | ***-0.08%*** |
| **GB** | 1.11% | 1.10% | 0.92% | 0.85% | 1.06% | ***-0.05%*** |
| **GR** | 0.84% | 0.91% | 0.88% | 0.87% | 0.71% | ***-0.13%*** |
| **HR** | 0.59% | 0.58% | 0.64% | 0.54% | 0.49% | ***-0.09%*** |
| **HU** | 0.94% | 1.04% | 0.99% | 0.78% | 0.87% | ***-0.07%*** |
| **IE** | 0.85% | 0.87% | 0.86% | 0.73% | 0.76% | ***-0.09%*** |
| **IT** | 0.62% | 0.63% | 0.63% | 0.57% | 0.57% | ***-0.05%*** |
| **LT** | 0.55% | 0.54% | 0.53% | 0.34% | 0.35% | ***-0.20%*** |
| **LU** | 0.35% | 0.33% | 0.32% | 0.35% | 0.35% | ***0.00%*** |
| **LV** | 0.76% | 0.76% | 0.68% | 0.40% | 0.35% | ***-0.41%*** |
| **MK** | 1.68% | 2.23% | 2.70% | 2.74% | 3.10% | ***1.42%*** |
| **MT** | 0.62% | 0.59% | 0.49% | 0.46% | 0.46% | ***-0.16%*** |
| **NL** | 0.77% | 0.78% | 0.74% | 0.67% | 0.69% | ***-0.08%*** |
| **NO** | 0.72% | 0.73% | 0.70% | 0.58% | 0.76% | ***0.04%*** |
| **PL** | 0.63% | 0.67% | 0.70% | 0.48% | 0.65% | ***0.02%*** |
| **PT** | 1.23% | 1.21% | 1.21% | 1.24% | 1.26% | ***0.03%*** |
| **RO** | 0.87% | 0.74% | 0.59% | 0.31% | 0.37% | ***-0.50%*** |
| **SE** | 0.86% | 0.87% | 0.85% | 0.71% | 0.92% | ***0.06%*** |
| **SI** | 0.75% | 0.85% | 0.83% | 0.89% | 0.93% | ***0.17%*** |
| **SK** | 1.50% | 1.64% | 1.95% | 1.23% | 1.20% | ***-0.30%*** |
| **TR** | 0.37% | 0.44% | 0.40% | 0.11% | 0.16% | ***-0.21%*** |
| ***EUR27*** | ***0.82%*** | ***0.83%*** | ***0.78%*** | ***0.70%*** | ***0.74%*** | ***-0.08%*** |

Source: European Audiovisual Observatory on data provided by Warc, IP Key facts (for LU) and Eurostat

T.4.4

# Television adspend in Europe
## 2006-2010

| Country | EUR million 2006 | 2007 | 2008 | 2009 | 2010 | As a percentage of total display adspend 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|---|---|---|
| **AT** | 524 | 573 | 598 | 603 | 648 | 21.5% | 20.2% | 20.0% | 20.2% | 20.3% |
| **BE** | 831 | 854 | 870 | 910 | 990 | 33.6% | 31.6% | 31.8% | 33.1% | 33.7% |
| **BG** | 201 | 261 | 293 | 240 | 240 | 71.5% | 73.9% | 76.9% | 72.5% | 74.5% |
| **CH** | 396 | 393 | 401 | 399 | 485 | 16.3% | 16.0% | 16.0% | 17.4% | 18.2% |
| **CY** | 47 | 52 | 56 | 63 | 59 | 63.6% | 62.2% | 62.6% | 66.1% | 69.4% |
| **CZ** | 313 | 343 | 392 | 335 | 336 | 46.7% | 44.9% | 44.2% | 42.5% | 38.1% |
| **DE** | 4 526 | 4 571 | 4 439 | 4 004 | 4 349 | 24.8% | 23.8% | 23.2% | 23.0% | 23.7% |
| **DK** | 331 | 338 | 326 | 277 | 303 | 18.8% | 17.9% | 18.0% | 18.4% | 19.5% |
| **EE** | 23 | 31 | 30 | 21 | 21 | 26.4% | 27.0% | 27.0% | 29.6% | 31.8% |
| **ES** | 3 188 | 3 467 | 3 039 | 2 378 | 2 472 | 43.6% | 43.3% | 43.4% | 42.1% | 42.1% |
| **FI** | 270 | 291 | 298 | 264 | 295 | 19.5% | 19.2% | 19.3% | 19.9% | 21.0% |
| **FR** | 3 897 | 4 033 | 3 876 | 3 450 | 3 837 | 31.3% | 30.4% | 29.4% | 29.9% | 31.7% |
| **GB** | 5 986 | 6 133 | 5 172 | 4 167 | 5 007 | 28.6% | 27.6% | 27.7% | 28.3% | 30.1% |
| **GR** | 754 | 894 | 819 | 679 | 525 | 43.9% | 45.5% | 41.9% | 34.8% | 32.9% |
| **HR** | 113 | 118 | 136 | 118 | 108 | 51.0% | 49.0% | 47.7% | 48.8% | 48.6% |
| **HU** | 394 | 408 | 438 | 378 | 401 | 45.3% | 43.5% | 44.2% | 49.0% | 49.9% |
| **IE** | 316 | 374 | 363 | 312 | 277 | 21.7% | 23.0% | 23.0% | 25.5% | 22.9% |
| **IT** | 4 599 | 4 653 | 4 851 | 4 359 | 4 619 | 50.8% | 48.9% | 50.5% | 51.5% | 52.4% |
| **LT** | 54 | 66 | 67 | 42 | 44 | 43.3% | 45.8% | 42.7% | 44.0% | 46.8% |
| **LU** | 10 | 12 | 14 | 15 | 15 | 9.2% | 9.5% | 11.4% | 11.5% | 11.0% |
| **LV** | 39 | 47 | 49 | 29 | 29 | 35.6% | 34.9% | 35.7% | 39.3% | 44.6% |
| **MK** | 62 | 92 | 153 | 158 | 186 | 72.9% | 74.2% | 90.5% | 86.8% | 88.6% |
| **MT** | 9 | 8 | 8 | 7 | 8 | 28.6% | 26.7% | 26.3% | 27.1% | 28.3% |
| **NL** | 810 | 863 | 867 | 792 | 875 | 19.9% | 19.7% | 20.1% | 20.7% | 21.9% |
| **NO** | 398 | 418 | 423 | 352 | 421 | 22.2% | 20.5% | 20.9% | 19.8% | 20.4% |
| **PL** | 809 | 908 | 1 047 | 657 | 857 | 49.1% | 46.6% | 45.4% | 37.3% | 40.7% |
| **PT** | 1 165 | 1 204 | 1 232 | 1 301 | 1 405 | 60.4% | 60.3% | 60.4% | 63.0% | 65.2% |
| **RO** | 498 | 487 | 468 | 223 | 244 | 66.8% | 63.5% | 58.9% | 55.3% | 56.9% |
| **RU** | 2 347 | 3 013 | 3 555 | 2 401 | 3 026 | 48.2% | 49.4% | 46.8% | 52.2% | 51.8% |
| **SE** | 545 | 562 | 572 | 455 | 600 | 20.3% | 19.6% | 20.0% | 20.3% | 21.2% |
| **SI** | 107 | 134 | 143 | 157 | 203 | 46.7% | 47.4% | 47.9% | 51.5% | 61.2% |
| **SK** | 482 | 628 | 888 | 496 | 511 | 77.2% | 77.9% | 78.4% | 65.6% | 65.0% |
| **TR** | 797 | 985 | 885 | 667 | 1 011 | 51.9% | 51.3% | 49.7% | 47.5% | 51.7% |
| ***EUR 27*** | ***30 728*** | ***32 196*** | ***31 214*** | ***26 612*** | ***29 170*** | ***32.9%*** | ***32.0%*** | ***32.2%*** | ***32.0%*** | ***32.8%*** |

Source: Warc (and IP for LU), European Audiovisual Observatory

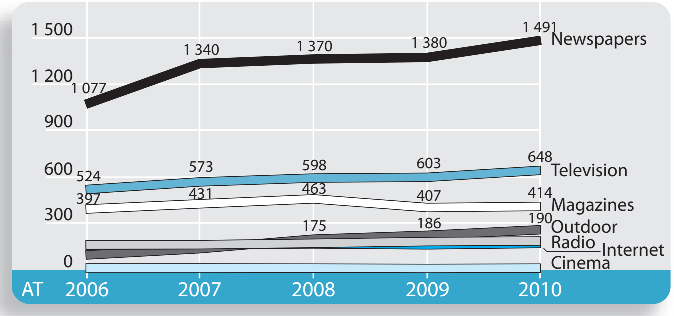
G.4.2

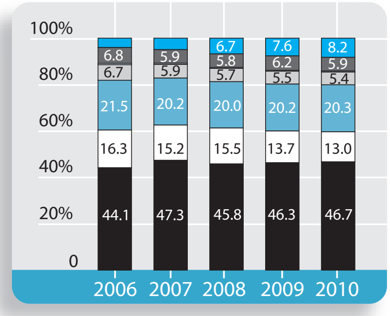
# Total display adspend in Europe

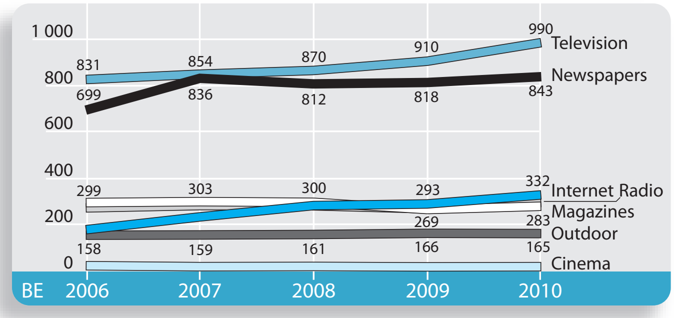
## 2006-2010

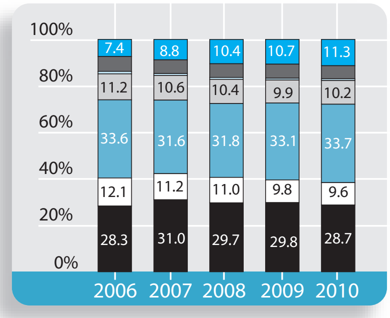
EUR million at current prices and exchange rates, net of discount.
Data exclude production costs, classified advertising, direct mail and directories.

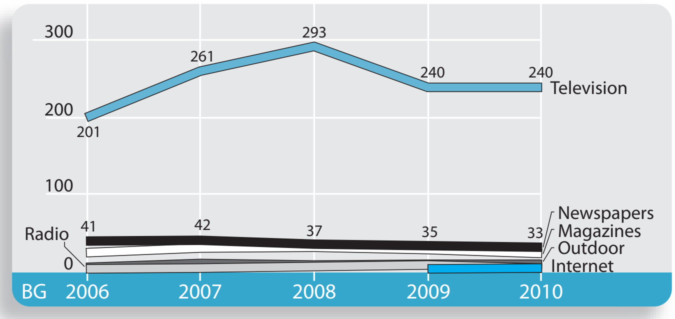
Internet
Outdoor
Cinema
Radio
Television
Magazines
Newspapers

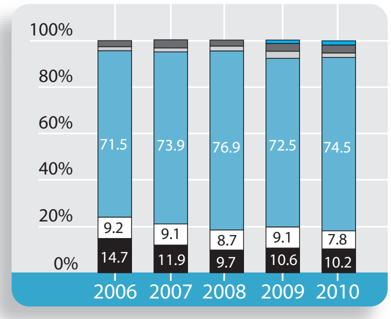


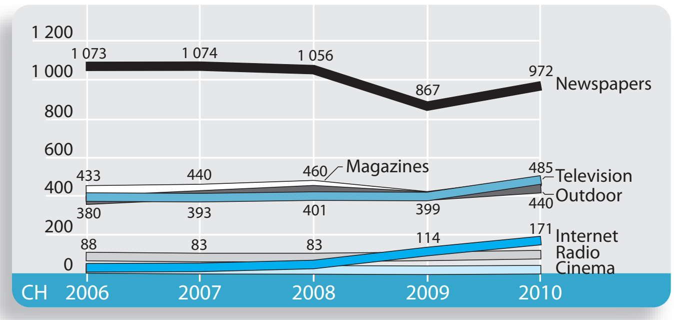



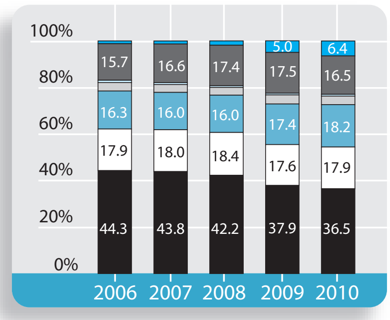



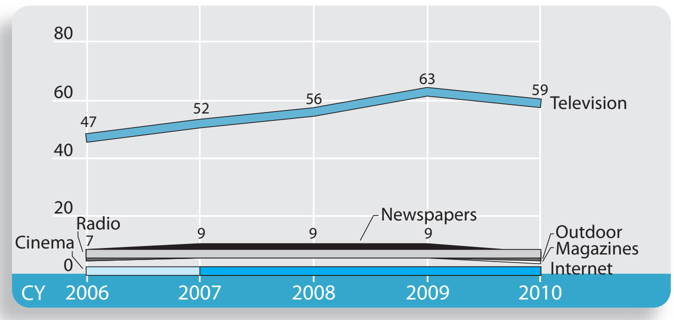



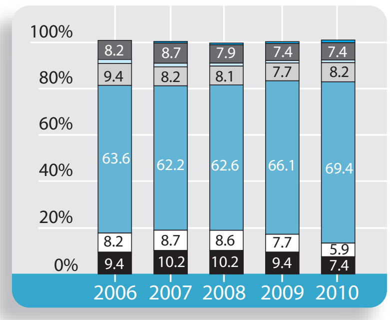



G.4.2

## Total display adspend in Europe (Continued)

## 2006-2010

EUR million at current prices and exchange rates, net of discount.
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Internet
Outdoor
Cinema
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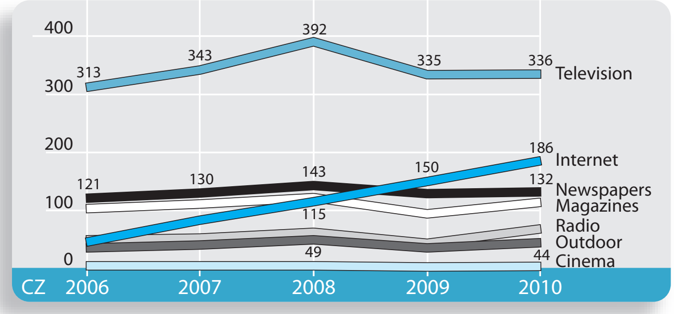
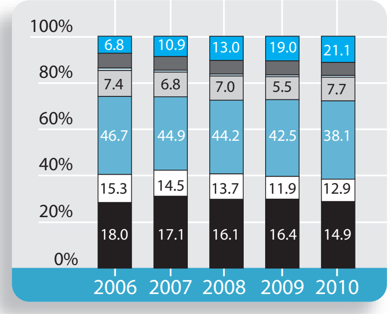
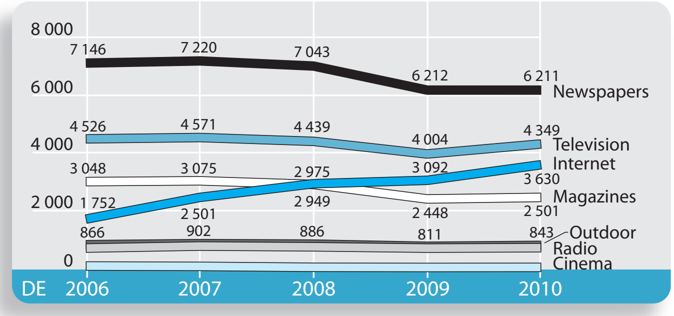
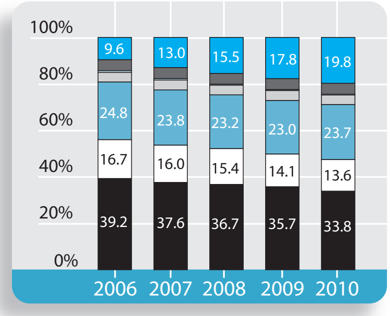
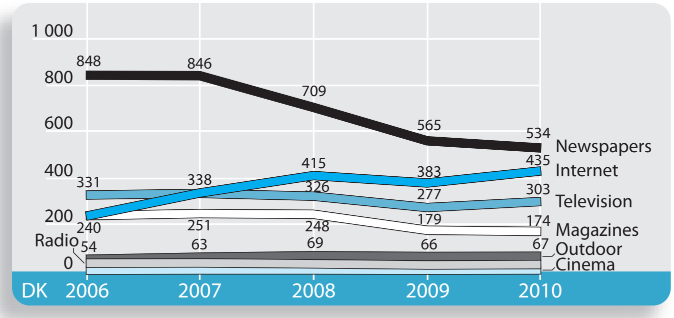
Television
Magazines
Newspapers

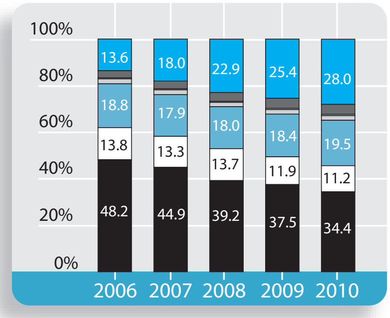


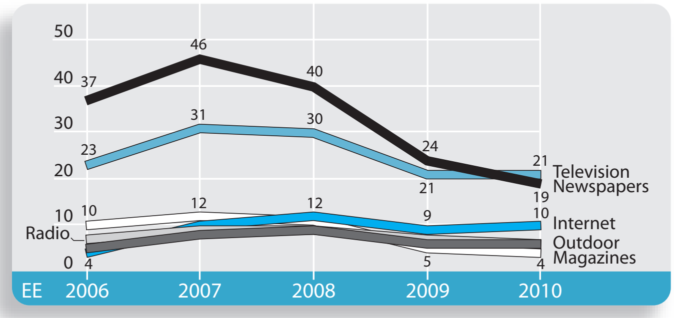



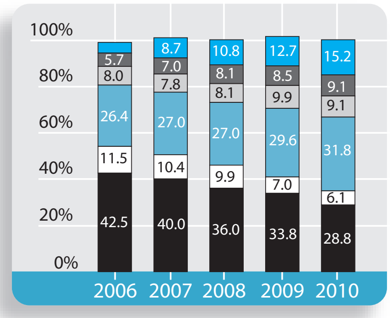



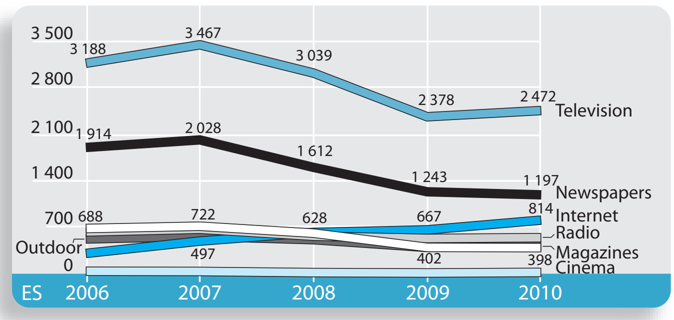



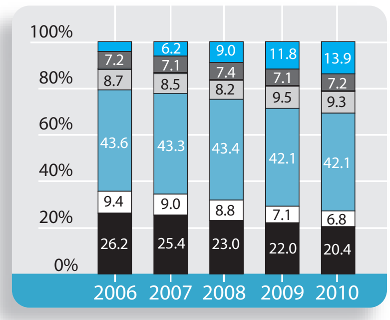



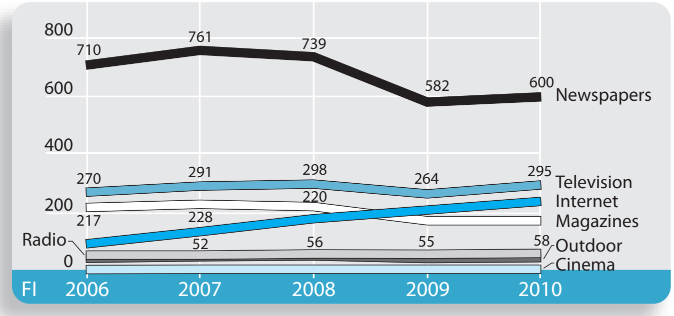
G.4.2

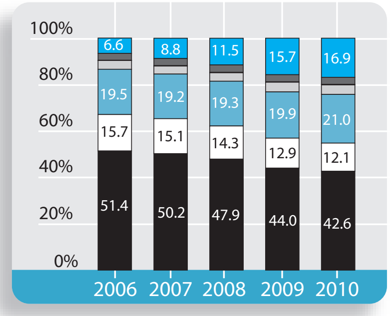
# Total display adspend in Europe (Continued)

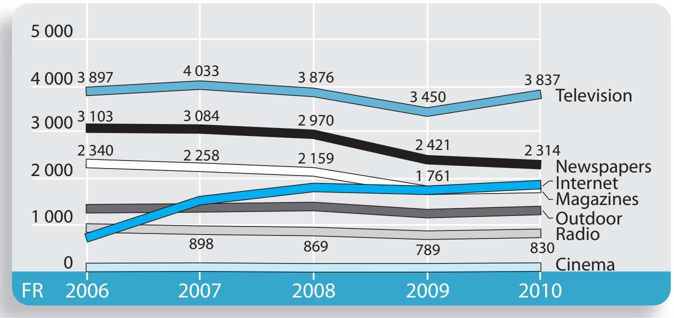
## 2006-2010

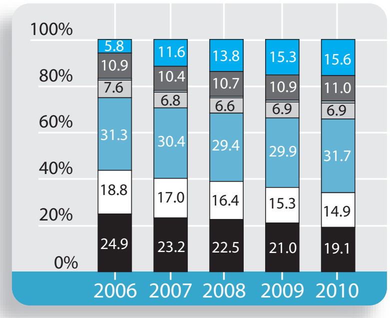
EUR million at current prices and exchange rates, net of discount.
Data exclude production costs, classified advertising, direct mail and directories.

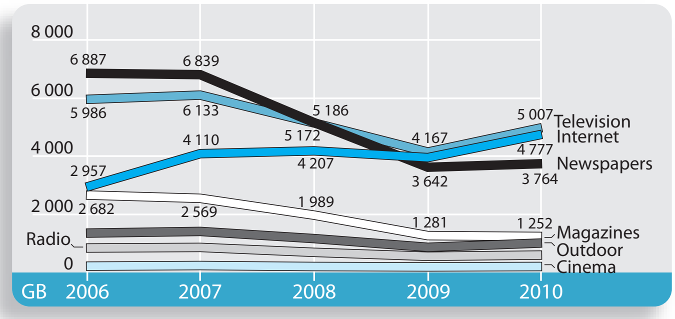
- Internet
- Outdoor
- Cinema
- Radio
- Television
- Magazines
- Newspapers

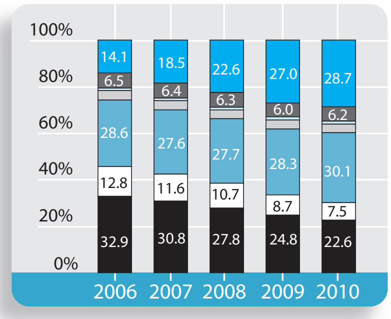


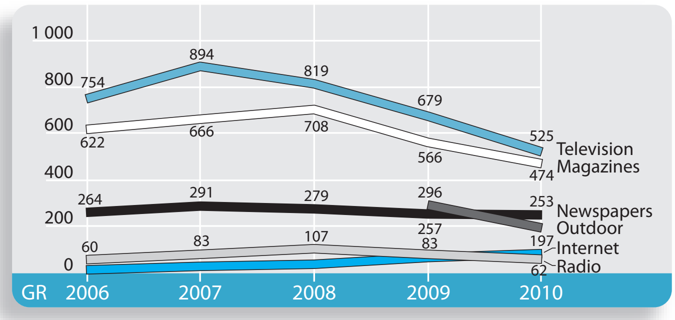



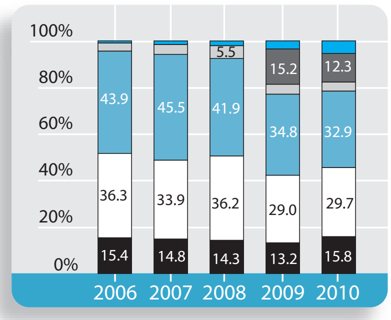



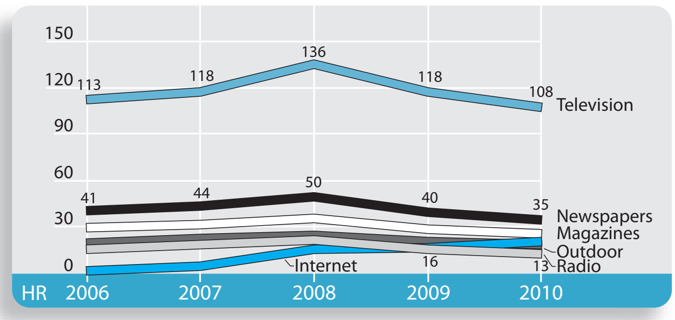



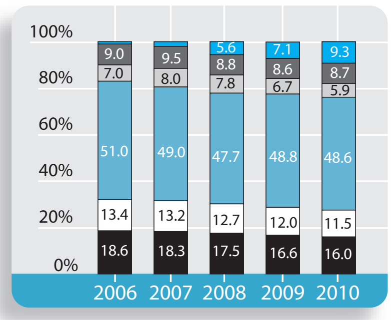



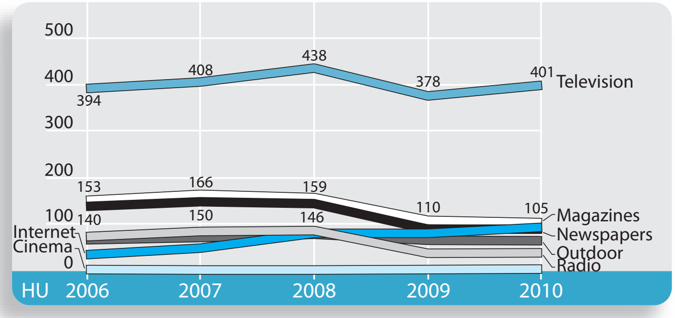
G.4.2

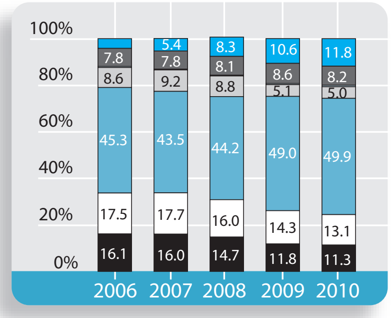
# Total display adspend in Europe (Continued)

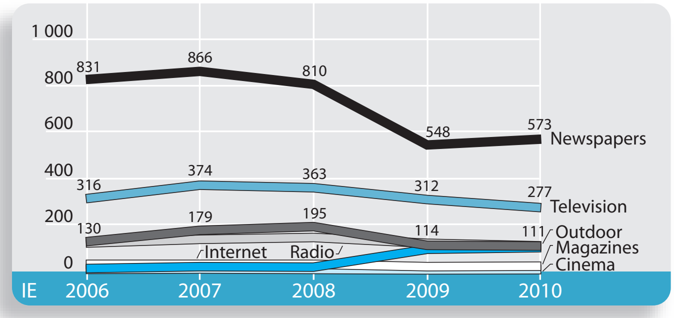
## 2006-2010

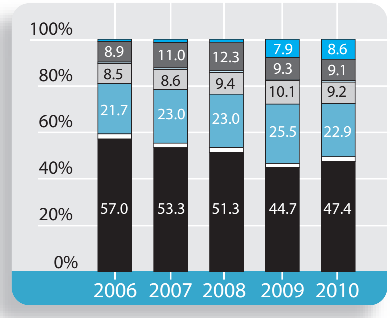
EUR million at current prices and exchange rates, net of discount.
Data exclude production costs, classified advertising, direct mail and directories.

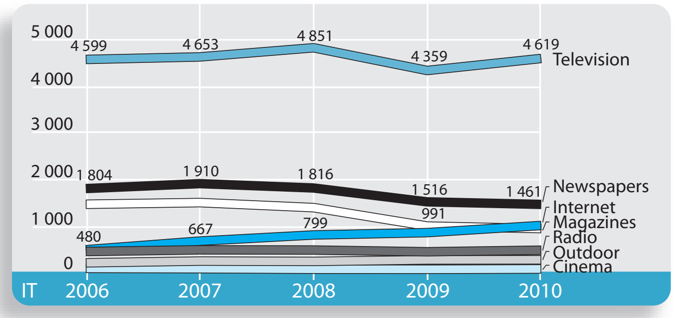
- Internet
- Outdoor
- Cinema
- Radio
- Television
- Magazines
- Newspapers

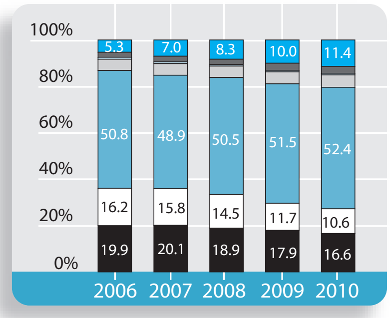


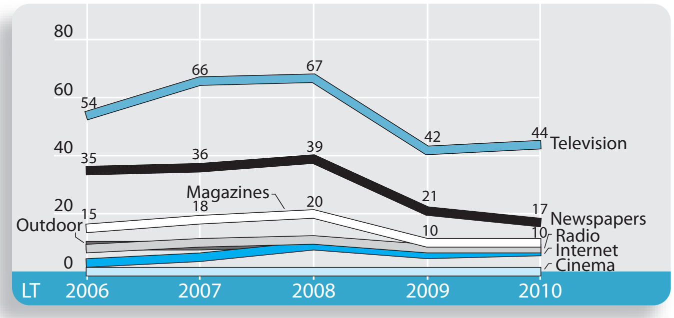



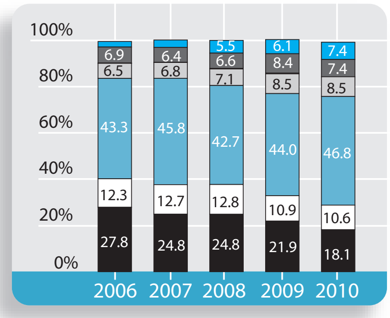



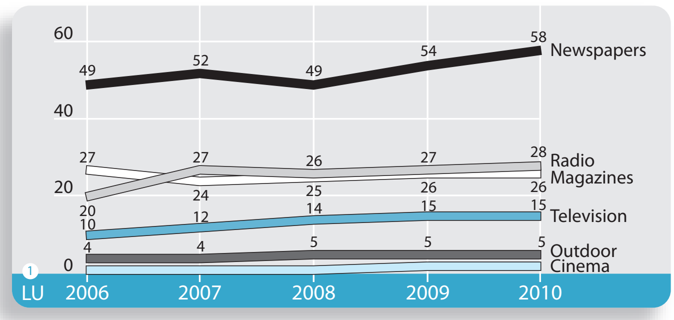



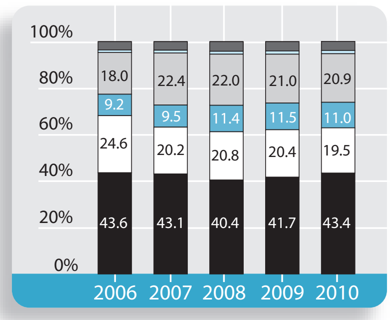



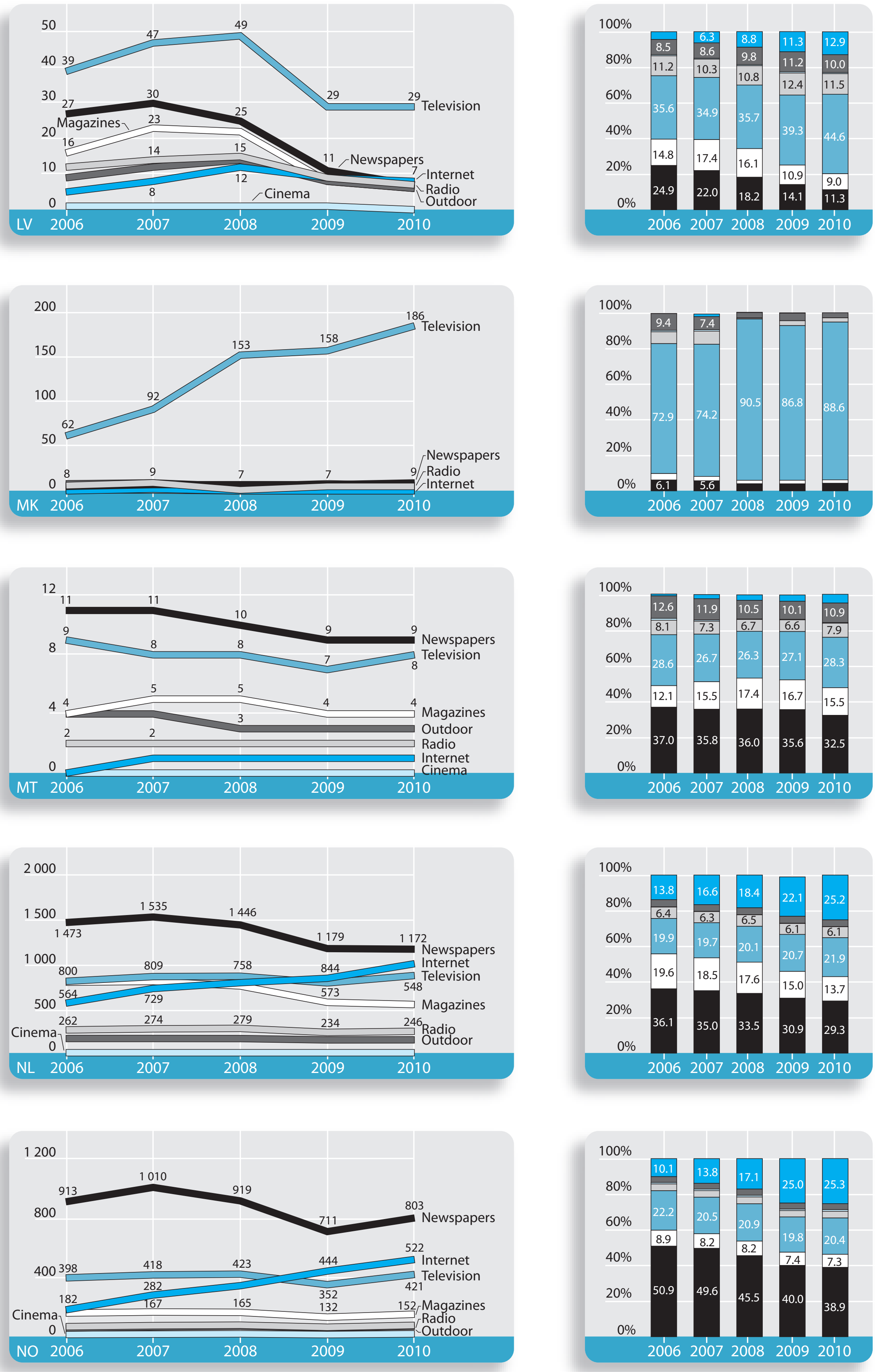

1 Gross advertising expenditure. Source: Mediaxim, IP Key Facts.

G.4.2

# Total display adspend in Europe (Continued)

## 2006-2010

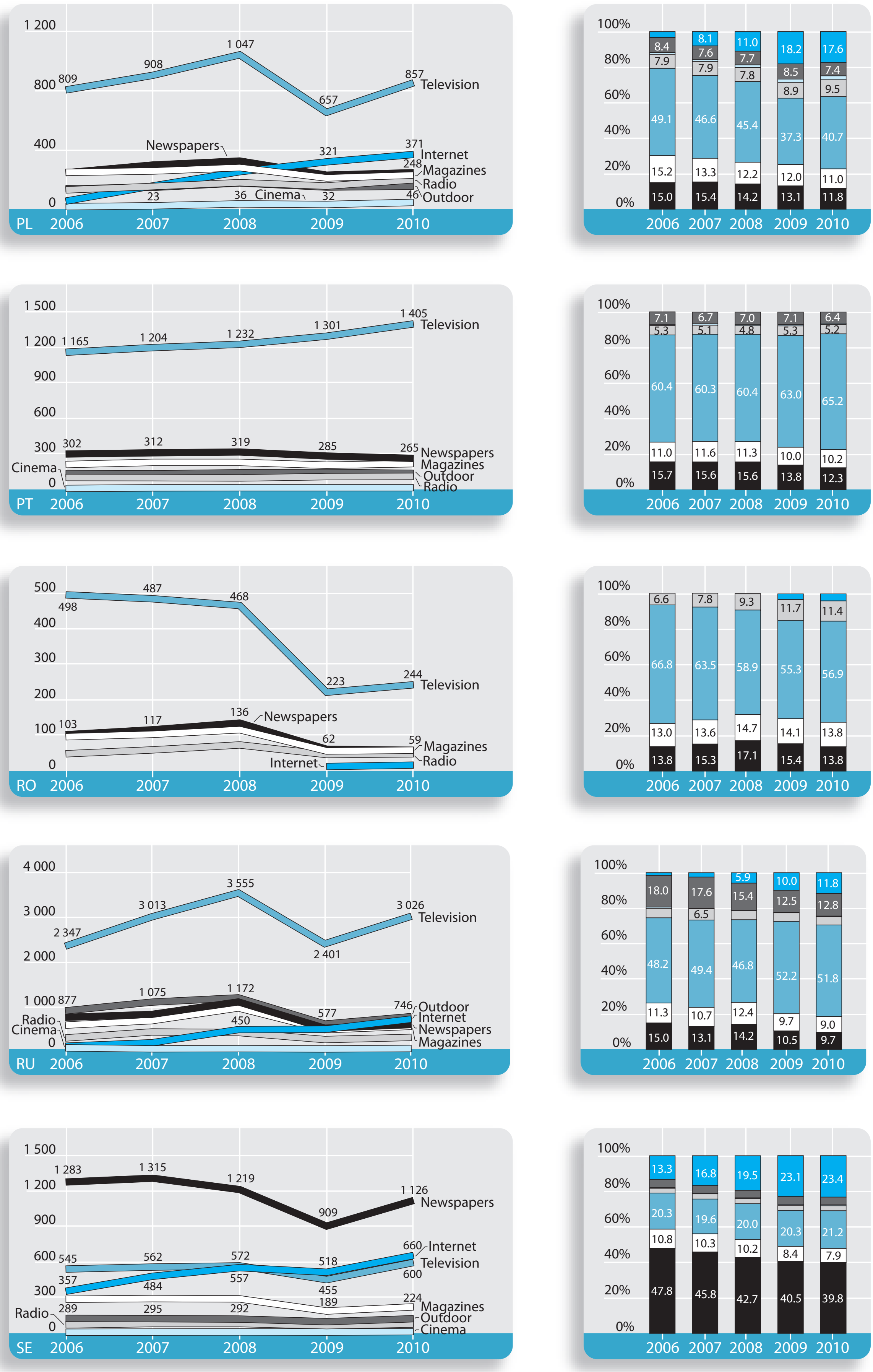
EUR million at current prices and exchange rates, net of discount.
Data exclude production costs, classified advertising, direct mail and directories.

G.4.2

## Total display adspend in Europe (Continued)

**2006-2010** EUR million at current prices and exchange rates, net of discount.
Data exclude production costs, classified advertising, direct mail and directories.

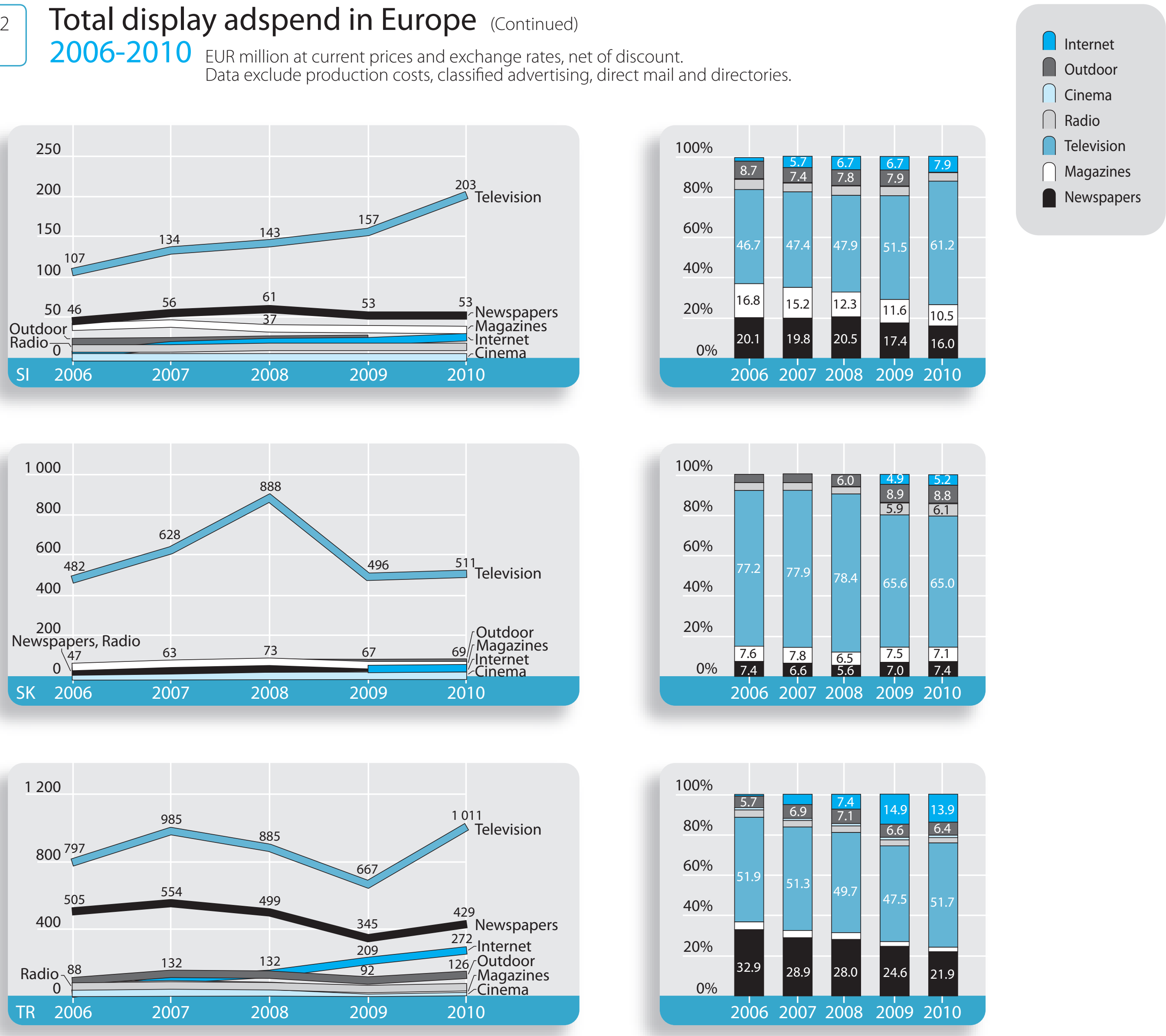



G.4.2

# Total display adspend in Europe (Continued)

## 2006-2010

EUR million at current prices and exchange rates, net of discount.
Data exclude production costs, classified advertising, direct mail and directories.




Source: Warc (and IP Key Fact for LU)

T.4.5

# Internet adspend in Europe 2006-2010

| Country | EUR million 2006 | 2007 | 2008 | 2009 | 2010 | As a percentage of total display adspend 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|---|---|---|---|---|
| **AT** | 99 | 140 | 202 | 227 | 263 | 4.1% | 4.9% | 6.7% | 7.6% | 8.2% |
| **BE** | 182 | 237 | 286 | 293 | 332 | 7.4% | 8.8% | 10.4% | 10.7% | 11.3% |
| **BG** | | | | 5 | 6 | 0.0% | 0.0% | 0.0% | 1.5% | 1.9% |
| **CH** | 30 | 32 | 47 | 114 | 171 | 1.2% | 1.3% | 1.9% | 5.0% | 6.4% |
| **CY** | | 1 | 1 | 1 | 1 | 0.0% | 0.7% | 0.8% | 0.8% | 1.2% |
| **CZ** | 45 | 83 | 115 | 150 | 186 | 6.8% | 10.9% | 13.0% | 19.0% | 21.1% |
| **DE** | 1 752 | 2 501 | 2 975 | 3 092 | 3 630 | 9.6% | 13.0% | 15.5% | 17.8% | 19.8% |
| **DK** | 240 | 340 | 415 | 383 | 435 | 13.6% | 18.0% | 22.9% | 25.4% | 28.0% |
| **EE** | 4 | 10 | 12 | 9 | 10 | 4.6% | 8.7% | 10.8% | 12.7% | 15.2% |
| **ES** | 311 | 497 | 628 | 667 | 814 | 4.2% | 6.2% | 9.0% | 11.8% | 13.9% |
| **FI** | 91 | 133 | 178 | 208 | 238 | 6.6% | 8.8% | 11.5% | 15.7% | 16.9% |
| **FR** | 729 | 1 537 | 1 821 | 1 760 | 1 883 | 5.8% | 11.6% | 13.8% | 15.3% | 15.6% |
| **GB** | 2 957 | 4 110 | 4 207 | 3 975 | 4 777 | 14.1% | 18.5% | 22.6% | 27.0% | 28.7% |
| **GR** | 16 | 31 | 40 | 69 | 86 | 1.0% | 1.6% | 2.0% | 3.5% | 5.4% |
| **HR** | 2 | 5 | 16 | 17 | 21 | 1.0% | 2.0% | 5.6% | 7.1% | 9.3% |
| **HU** | 36 | 50 | 82 | 82 | 95 | 4.2% | 5.4% | 8.3% | 10.6% | 11.8% |
| **IE** | 14 | 22 | 20 | 97 | 104 | 0.9% | 1.4% | 1.3% | 7.9% | 8.6% |
| **IT** | 480 | 667 | 799 | 850 | 1 004 | 5.3% | 7.0% | 8.3% | 10.0% | 11.4% |
| **LT** | 3 | 5 | 9 | 6 | 7 | 2.4% | 3.2% | 5.5% | 6.1% | 7.4% |
| **LU** | ~ | ~ | ~ | ~ | ~ | ~ | ~ | ~ | ~ | ~ |
| **LV** | 5 | 8 | 12 | 9 | 8 | 4.3% | 6.3% | 8.8% | 11.3% | 12.9% |
| **MK** | 0 | 2 | 0 | 0 | 0 | 0.1% | 1.4% | 0.2% | 0.2% | 0.0% |
| **MT** | 0 | 1 | 1 | 1 | 1 | 1.0% | 2.3% | 3.1% | 3.6% | 4.9% |
| **NL** | 564 | 729 | 794 | 844 | 1 008 | 13.8% | 16.6% | 18.4% | 22.1% | 25.2% |
| **NO** | 182 | 282 | 345 | 444 | 522 | 10.1% | 13.8% | 17.1% | 25.0% | 25.3% |
| **PL** | 55 | 158 | 254 | 321 | 371 | 3.4% | 8.1% | 11.0% | 18.2% | 17.6% |
| **PT** | ~ | ~ | ~ | ~ | ~ | ~ | ~ | ~ | ~ | ~ |
| **RO** | | | | 13 | 17 | 0.0% | 0.0% | 0.0% | 3.2% | 4.0% |
| **RU** | 74 | 152 | 450 | 458 | 689 | 1.5% | 2.5% | 5.9% | 10.0% | 11.8% |
| **SE** | 357 | 484 | 557 | 518 | 660 | 13.3% | 16.8% | 19.5% | 23.1% | 23.4% |
| **SI** | 4 | 16 | 20 | 21 | 26 | 1.8% | 5.7% | 6.7% | 6.7% | 7.9% |
| **SK** | | | | 37 | 41 | 0.0% | 0.0% | 0.0% | 4.9% | 5.2% |
| **TR** | 13 | 98 | 132 | 209 | 272 | 0.8% | 5.1% | 7.4% | 14.9% | 13.9% |
| ***EUR 27*** | ***7 945*** | ***11 760*** | ***13 427*** | ***13 637*** | ***16 004*** | ***8.5%*** | ***11.7%*** | ***13.9%*** | ***16.4%*** | ***18.0%*** |

Source: Warc (and IP Key facts for LU) / European Audiovisual Observatory

Chapter
Chapitre
*Kapitel*
5

# Digital distribution platforms

# Plates-formes de distribution numérique

# *Digitale Verbreitungs-plattformen*

# Digital platforms

Chapter 5 is devoted to the distribution of audiovisual television services and the development of internet and broadband services in Europe.

The first tables (T.5.1 and T.5.2) provide details of the digitisation of audiovisual services in Europe and identify the main operators of digital platforms. At the end of 2010, 58% of European television households (37 countries) had digital reception, but this figure reaches 74% if only European Union households (EU27) are taken into account.

The rest of the chapter is organised by type of distribution platform: digital terrestrial television (DTT), cable, satellite, IPTV, mobile television, broadband networks and online distribution platfroms.. Graph G.5.1, below, provides an excellent introduction to this section, detailing the growth in the number of platforms in Europe between the end of 2008 and the end of 2011.

Cable operators are still by far the largest group (6 851) but their number continued to decline in 2011, as did that of the satellite platform operators (79), which shrank for the first time since 2008, and mobile television operators (66), especially owing to the cessation of the operations of a large number of DVB-H platforms in 2011. On the other hand, there is an increasing number of operators of pay-DTT (33) and IPTV packages (150). There is no change in these trends whether one considers Europe (37 countries), or just the 27 EU members.

# Plates-formes numériques

Le chapitre 5 est consacré à la distribution de services audiovisuels de télévision et au développement d'Internet et des réseaux haut-débit en Europe.

Les premiers tableaux (T.5.1 et T.5.2) sont consacrés à la numérisation des services audiovisuels de télévision en Europe et à l'identification des principaux opérateurs de plates-formes numériques. A la fin de l'année 2010, 58 % des foyers télévisés européens (EUR 37) sont numérisés, un chiffre qui s'établit à 74 % si l'on s'intéresse uniquement aux foyers de l'Union européenne (EUR 27).

La suite du chapitre est organisée par type de plate-forme de distribution : télévision numérique terrestre (TNT), câble, satellite, IPTV, télévision mobile et réseaux large bande. A ce titre, le graphique G.5.1 ci-dessous constitue une excellente introduction : il détaille l'évolution du nombre de plates-formes en Europe entre fin 2008 et fin 2011.

Les câblo-opérateurs demeurent de loin les plus nombreux (6 851), mais leur nombre continue de décroître en 2011, tout comme celui des opérateurs de plates-formes satellite (79), qui se contracte pour la première fois depuis 2008 et celui des opérateurs de télévision mobile (66), notamment du fait de l'arrêt de nombreuses plates-formes DVB-H en 2011. A l'inverse, les opérateurs de TNT payante (33) et de bouquets IPTV (150) sont toujours plus nombreux. Ces tendances demeurent inchangées que l'on considère l'Europe (EUR 37) ou seulement les 27 pays de l'Union européenne.

# *Digitale Plattformen*

Kapitel 5 befasst sich mit der Verbreitung von audiovisuellen Diensten und der Entwicklung des Internets und von Breitbandnetzen in Europa.

In den ersten Tabellen (T.5.1 und T.5.2) werden die wichtigsten Betreiber von digitalen Plattformen sowie der aktuelle Stand in der Digitalisierung der audiovisuellen Dienste in Europa ausgewiesen. So hatten Ende 2010 bereits 58 % der Haushalte in Europa (EUR 37) auf Digitalfernsehen umgestellt. Betrachtet man nur die Haushalte in der Europäischen Union (EUR 27) steigt dieser Anteil auf 74 %.

Der Rest des Kapitels ist nach Verbreitungsplattformen gegliedert: terrestrisches Digitalfernsehen (DVBT), Kabel, Satellit, IPTV, Mobilfernsehen und Breitbandnetze. Hierzu bildet nachfolgende Grafik G.5.1 einen guten Einstieg. Dargestellt ist die zahlenmäßige Entwicklung der Verbreitungsplattformen in Europa von Ende 2008 bis Ende 2011.

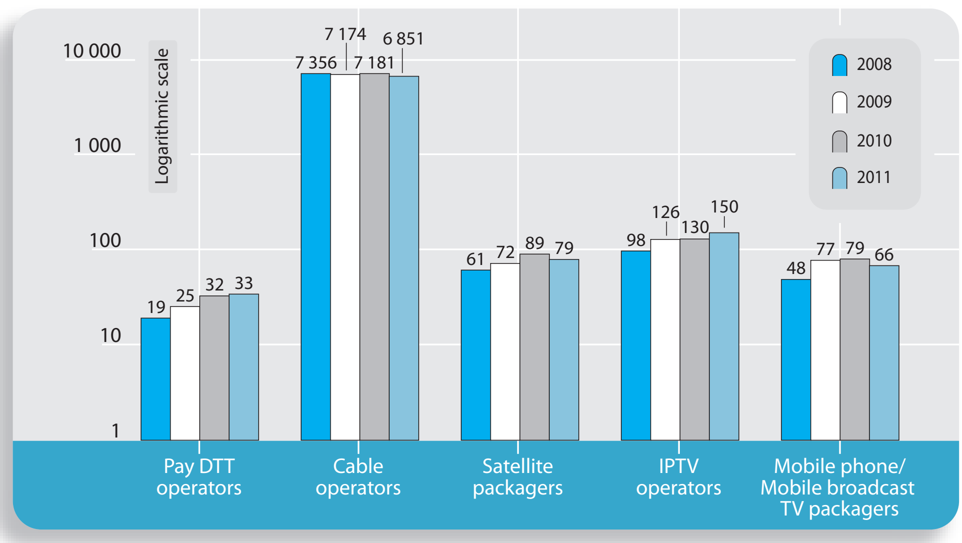
Die Kabelnetzbetreiber stellen nach wie vor die zahlenmäßig mit Abstand größte Gruppe (6 851), aber ihre Anzahl ist auch 2011 erneut zurückgegangen, wie auch die der Betreiber von Satellitenplattformen (79), die erstmals seit 2008 rückläufig ist, und – insbesondere bedingt durch die Einstellung zahlreicher DVB-H-Plattformen im Jahr 2011 – die der Handy-TV-Betreiber. Dagegen steigt die Anzahl der Anbieter von Pay-DVB-T (33) und IPTV-Bouquets (150) immer weiter an. Diese Trends sind sowohl europaweit (EUR 37) als auch EU-weit (EUR 27) feststellbar.

Source: European Audiovisual Observatory, MAVISE database

G.5.1

## Number of TV distribution platforms in 37 European countries 2008-2011

In units.




The 2008, 2009 and 2010 data for all platforms have been adjusted to include Bosnia and Herzegovina.
The 2008, 2009 and 2010 data for cable operators have been adjusted

Source: European Audiovisual Observatory, MAVISE database

T.5.1

## Operators of digital platforms in Europe
## 2007-2010

Operating revenues, EUR million, current rate.
The ranking does not include operators of IPTV nor mobile platforms (breakdown of revenues not published by telecom operators). Revenues of cable operators include pay-TV revenues as well as revenues from other services (Internet, fixed telephony, mobile telephony). Multi-utility companies operating cable activities are also excluded.

| Rank | Company | Country | Platform | Packages | Own TV channels [22] | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | British Sky Broadcasting PLC (cons.) [1] | GB | SAT, ThTV, BB | Sky | 85 | 6 756.0 | 6 257.0 | 6 279.0 | 6 990.0 | ***11.3%*** |
| *p.m.* | - British Sky Broadcasting Ltd | GB | SAT, ThTV, BB | Sky | | 6 015.4 | 5 322.9 | 5 250.1 | 6 424.6 | ***22.4%*** |
| 2 | Liberty Global Europe [2] | NL | CAB | | 173 | 3 553.0 | 4 242.2 | 4 020.5 | 5 267.0 | ***31.0%*** |
| | UPC Broadband division | | CAB, SAT | UPC (AT, CZ, IE, HU, NL, PL, RO, SI, SK), Cablecom (CH) | | 2 675.8 | 3 203.4 | 2 858.0 | 3 974.4 | ***39.1%*** |
| | - UPC Nederland B.V. | NL | CAB | UPC Nederland | | 773.5 | 803.7 | 820.6 | 869.9 | ***6.0%*** |
| | - Unity Media GmbH | DE | CAB | | | – | – | – | 866.9 | **–** |
| *p.m.* | (Old) Unity Media GmbH [3] | DE | CAB, SAT | Unity Media | | 1 058.0 | 1 221.3 | 1 100.0 | – | **–** |
| | - Cablecom | CH | CAB | Cablecom | | 632.5 | 741.7 | 744.3 | 891.2 | ***19.7%*** |
| | - UPC Brodband Ireland Ltd | IE | CAB | UPC | | 222.5 | 240.1 | 250.2 | 278.1 | ***11.2%*** |
| | - UPC Magyar | HU | CAB, SAT | UPC, UPC Direct | | 215.6 | 243.9 | 252.5 | 213.3 | ***-15.5%*** |
| | - UPC Polska | PL | CAB | UPC | | 92.7 | 182.4 | 211.9 | ~ | **~** |
| | - UPC Ceska Republika | CZ | CAB, SAT | UPC, UPC Direct | | 174.4 | 180.3 | 192.2 | 200.0 | ***4.1%*** |
| | - UPC Romania | RO | CAB, SAT | UPC, UPC Direct | | 182.8 | 162.5 | 152.9 | 132.9 | ***-13.1%*** |
| | - UPC Austria | AT | CAB | UPC Austria | | 107.2 | 91.2 | 84.9 | 79.6 | ***-6.2%*** |
| | - UPC Broadband Slovakia | SK | CAB, SAT | UPC, UPC Direct | | 47.2 | 56.2 | 42.1 | 37.7 | ***-10.5%*** |
| | Telenet [4] | BE | CAB, ThTV | Telenet | | 946.9 | 1 059.9 | 1 202.0 | 1 326.0 | ***10.3%*** |
| 3 | Groupe Canal+ [5] | FR | | | 72 | 4 363.0 | 4 554.0 | 4 553.0 | 4 712.0 | ***3.5%*** |
| *p.m.* | Canal+ Distribution *est.* | FR | SAT, IPTV, TNT | Canalsat | | 2 007.0 | ~ | ~ | ~ | **~** |
| *p.m.* | Canal+ S.A. (cons.) | FR | ThTV | Canal+ Le Bouquet | | 1 740.0 | 1 813.0 | 1 775.0 | 1 787.0 | ***0.7%*** |
| *p.m.* | Canal + Cyfrowy | PL | SAT | Canal + Cyfrowy | | 265.6 | 264.5 | 328.3 | 357.4 | ***8.9%*** |
| *p.m.* | Canal Satellite Caraïbes | FR | SAT | Canalsat | | 106.1 | 109.9 | 120.2 | ~ | **~** |
| *p.m.* | Canal+ Afrique | FR | SAT, Thtv | Canal+ (African version) | | 63.1 | 75.5 | 96.2 | 124.3 | ***29.2%*** |
| *p.m.* | Canalsatellite Réunion | FR | SAT | Canalsat | | 51.5 | – | – | – | **–** |
| 4 | Virgin Media Finance PLC [7] | GB | | | 20 | 5 388.4 | 4 090.6 | 4 157.6 | 4 412.7 | ***6.1%*** |
| *p.m.* | - Virgin Media, Cable Segment / Consumers | GB | CAB | Virgin Media | | 3 383.5 | 3 173.0 | 3 466.0 | 3 548.0 | ***2.4%*** |
| *p.m.* | - Virgin Media Segment content | GB | ThTV | Virgin Media TV / Sit up | | 473.7 | 368.2 | 156.1 | – | **–** |
| 5 | Sky Italia | IT | SAT | Sky Italia | 79 | 2 479.4 | 2 688.6 | 2 877.3 | 3 031.5 | ***5.4%*** |
| 6 | Kabel Deutschland [8] | DE | CAB, SAT | Kabel Digital | 2 | 1 209.5 | 1 388.4 | 1 516.2 | ~ | **~** |
| 7 | Grupo Corporativo ONO | ES | CAB | TV Esencial, TV Extra, TV Total | 3 | 1 616.0 | 1 602.5 | 1 512.0 | 1 472.0 | ***-2.6%*** |
| *p.m.* | Cableuropa Sa | ES | CAB | | | 1 604.5 | 1 574.6 | 1 481.5 | ~ | **~** |
| *p.m.* | Factoria de canales S.L. | ES | ThTV | Teuve | | 39.0 | 44.6 | – | – | **–** |
| 8 | Zesko B.V. | NL | CAB | Ziggo | 1 | 1 093.9 | 1 238.6 | 1 284.4 | 1 375.7 | ***7.1%*** |
| 9 | Ypso France SAS (cons.) [9] | FR | CAB | Numericable | | 1 029.7 | 1 092.4 | ~ | ~ | **~** |
| *p.m.* | Numericable | FR | CAB | Numericable | | 472.4 | 572.6 | 597.6 | 636.7 | ***6.5%*** |
| *p.m.* | NC Numericable | FR | CAB | Numericable | | 469.4 | 456.1 | 415.6 | 368.4 | ***-11.4%*** |
| *p.m.* | Coditel Brabant | BE | CAB | Numericable | | 39.8 | 43.1 | 46.9 | 48.5 | ***3.4%*** |
| *p.m.* | Est Video-communication | FR | CAB | Numericable | | 65.8 | 70.8 | 65.6 | 63.2 | ***-3.7%*** |
| 10 | Sogecable (cons.) | ES | | Digi + | 65 [23] | 1 809.5 | 1 869.0 | 1 523.7 | 1 083.3 | ***-28.9%*** |

T.5.1

## Operators of digital platforms in Europe (Continued)

## 2007-2010

Operating revenues, EUR million, current rate.
The ranking does not include operators of IPTV nor mobile platforms (breakdown of revenues not published by telecom operators). Revenues of cable operators include pay-TV revenues as well as revenues from other services (Internet, fixed telephony, mobile telephony). Multi-utility companies operating cable activities are also excluded.

| Rank | Company | Country | Platform | Packages | Own TV channels [22] | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|---|---|---|
| *p.m.* | DTS (Via Digital) [10] | **ES** | SAT | Digi + | | 220.8 | 145.7 | 154.7 | 1 028.4 | ***564.8%*** |
| *p.m.* | Canalsatelite Digital S.L. [10] | **ES** | SAT | Digi + | | 1 192.0 | 1 202.0 | 1 076.8 | – | – |
| *p.m.* | Sogecable S.A [11] | **ES** | AdTV | | | 372.3 | 414.2 | 286.6 | 23.6 | ***-91.8%*** |
| *p.m.* | Cinemania S.L. | **ES** | ThTV | | | 6.8 | 1.0 | ~ | 367.0 | ~ |
| 11 | Sky Deutschland AG [12] | **DE** | SAT | Sky Deutschland | 19 | 1 082.7 | 979.9 | 913.5 | 994.1 | ***8.8%*** |
| *p.m.* | Sky Deutschland GmbH | **DE** | SAT | Sky Deutschland | | 961.6 | 976.0 | 843.6 | ~ | ~ |
| *p.m.* | Sky Österreich GmbH | **AT** | SAT | Sky Deutschland | | 92.8 | 83.4 | ~ | 92.7 | ~ |
| 12 | Zon Multimedia S.A. [13] | **PT** | CAB, SAT | ZON TV Cabo | 24 | 715.7 | 776.6 | 823.0 | 859.7 | ***4.5%*** |
| *p.m.* | Zon TV Cabo Portugal | **PT** | CAB | ZON TV Cabo | | 589.7 | 633.9 | 687.2 | 709.8 | ***3.3%*** |
| *p.m.* | Zon Conteudos S.A. | **PT** | ThTV | | | 58.3 | 61.4 | 42.8 | 55.5 | ***29.7%*** |
| 13 | DNA Oy (cons.) | **FI** | CAB | DNA | | 540.0 | 652.2 | 657.1 | 694.2 | ***5.6%*** |
| 14 | Kabel BW GmbH (cons.) | **DE** | CAB | Kabel BW | | 357.2 | 438.0 | 493.0 | 563.0 | ***14.2%*** |
| 15 | Tecteo Group (cons.) [14] | **BE** | CAB | Voo | | 336.5 | 365.5 | 440.3 | 554.9 | ***26.0%*** |
| 16 | Polsat Cyfrowy S.A. | **PL** | SAT | Polsat | 15 [24] | 221.5 | 274.4 | 311.7 | 542.1 | ***73.9%*** |
| 17 | Com Hem AB [15] | **SE** | CAB | Com Hem | | 289.2 | 331.8 | 399.9 | 482.6 | ***20.7%*** |
| 18 | Yousee A/S | **DK** | CAB | Yousee | 1 | 337.7 | 392.0 | 432.9 | 480.4 | ***11.0%*** |
| 19 | RCS & RDS SA [16] | **RO** | CAB, SAT | Digi TV | 1 | 356.9 | 400.8 | 425.4 | 457.0 | ***7.4%*** |
| *p.m.* | Digi Tavkozlesi Kft | **HU** | SAT | Digikabel | | 51.6 | 79.3 | 81.3 | 94.0 | ***15.6%*** |
| *p.m.* | Miro Sat SRL | **RO** | SAT | Digi TV Romania | | 0.4 | 0.0 | ~ | ~ | ~ |
| 20 | Canal Digital Kabel TV AS | **NO** | CAB | Canal Digital | | 164.4 | 159.1 | 222.8 | 268.4 | ***20.5%*** |
| 21 | Canal Digital Norge AS | **NO** | SAT | Canal Digital | | 205.6 | 190.5 | 237.5 | 264.0 | ***11.2%*** |
| 22 | Boxer TV-Access | **SE** | DTT | Boxer TV | | 193.3 | 180.9 | 199.1 | 227.6 | ***14.3%*** |
| 23 | R Cable y telecom-municaciones Galicia SA | **ES** | CAB | R | | 134.1 | 182.9 | 202.6 | 222.1 | ***9.6%*** |
| 24 | Get AS | **NO** | CAB | Get Digital TV | | 139.6 | 133.1 | 174.4 | 210.0 | ***20.4%*** |
| 25 | Canal Digital Sverige AB | **SE** | SAT | Canal Digital | | 172.7 | 162.4 | 174.3 | 205.5 | ***17.9%*** |
| 26 | NTV-PLYUS | **RU** | SAT | NTV+ | 10 | 180.7 | 183.5 | 180.2 | 202.9 | ***12.6%*** |
| 27 | Multichoice Hellas [17] | **GR** | SAT | Nova Hellas | | 190.7 | 148.1 | 197.6 | 196.2 | ***-0.7%*** |
| 28 | Viasat AB | **SE** | SAT | Viasat | | 136.3 | 131.7 | 137.6 | 184.8 | ***34.3%*** |
| 29 | Vectra S.A. (cons.) | **PL** | CAB | Vectra telewizija | | 78.5 | 88.2 | 109.1 | 162.1 | ***48.6%*** |
| 30 | Viasat A/S | **DK** | SAT | Viasat | | 107.3 | 128.5 | 140.9 | 148.7 | ***5.5%*** |
| 31 | Telia Sofa A/S | **DK** | CAB | Telia Sofia | | 126.0 | 140.9 | 136.9 | 146.8 | ***7.2%*** |
| 32 | Cabovisao [18] | **PT** | CAB | Cabovisao | | 168.0 | 152.5 | 138.8 | ~ | ~ |
| 33 | Multimedia Polska | **PL** | CAB | Cyfrowa Telewizja Kablowa DTV | | 99.4 | 102.7 | 118.3 | 133.7 | ***13.0%*** |
| 34 | Telecable de Asturias | **ES** | CAB | Telecable | | 87.8 | 96.9 | 106.9 | 121.6 | ***13.8%*** |
| 35 | Rikstv AS | **NO** | DTT | | | 7.0 | 41.7 | 69 | 114.6 | ***66.1%*** |
| 36 | Primacom AG [19] | **DE** | CAB | Primacom | | 116.6 | 114.1 | ~ | ~ | ~ |
| 37 | Anvia Oyj (cons.) | **FI** | CAB | Anvia | | 83.8 | 102.0 | 104 | 109.2 | ***5.0%*** |
| 38 | AB Sat | **FR** | SAT | Absat | 15 | ~ | ~ | ~ | 109.1 | ~ |
| 39 | Aster sp z.o.o. | **PL** | CAB | Aster | | 82.4 | 94.8 | 102.5 | 107.0 | ***4.4%*** |
| 40 | ITI Neovision SP Z.O.O. [20] | **PL** | SAT | N | | 31.2 | 65.7 | 106.8 | ~ | ~ |
| 41 | Viasat AS | **NO** | SAT | Viasat | | 91.0 | 75.0 | 89.5 | 105.5 | ***17.9%*** |
| 42 | Canal Digital Danmark A/S [21] | **DK** | SAT | Canal Digital | | 128.3 | 134.2 | 121.4 | 105.3 | ***-13.3%*** |
| 43 | Vitalis | **FR** | CAB | Vitalis | | 87.9 | 90.7 | 92.3 | ~ | ~ |
| 44 | Société intercommunale pour la diffusion de la télévision | **BE** | CAB | Brutele | | 73.7 | 77.2 | 79.6 | 89.7 | ***12.7%*** |
| 45 | Dansk Kabel TV A/S | **DK** | CAB | | | 49.9 | 54.9 | 76.9 | 78.6 | ***2.2%*** |

T.5.1

# Operators of digital platforms in Europe (Continued)

## 2007-2010

Operating revenues, EUR million, current rate.
The ranking does not include operators of IPTV nor mobile platforms (breakdown of revenues not published by telecom operators). Revenues of cable operators include pay-TV revenues as well as revenues from other services (Internet, fixed telephony, mobile telephony). Multi-utility companies operating cable activities are also excluded.

| Rank | Company | Country | Platform | Packages | Own TV channels (22) | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|---|---|
| 46 | Tricolor TV | **RU** | SAT | Tricolor | | ~ | ~ | ~ | 70.6 | ~ |
| 47 | Dahlia TV | **IT** | DTT | Dahlia TV | | – | 0.7 | 87.4 | 66.0 | ***-24.5%*** |
| 48 | CAIW Diensten B.V. | **NL** | CAB | CAIW | | 53.5 | 54.4 | 62.8 | 63.1 | ***0.5%*** |
| 49 | Digi TV Plus Oy | **FI** | DTT | Digi TV Plus | | 19.8 | 52.4 | 58.2 | 62.1 | ***6.7%*** |
| 50 | Telefonica Cable | **ES** | CAB | Telefonica Cable | | 49.4 | 65.2 | 72.6 | 61.1 | ***-15.8%*** |

(1) 2011 (as at 30 June: 7306 (+4.5 %).
(2) The Dutch holding Liberty Global Europe does not publish financial statements. We estimate the turnover from data published in USD by the US company Liberty Global Inc.
(3) Unity Media GmbH was born in 2005 from the merger of the two cable operators IESY GmbH and ish. The group was fully acquired by Liberty Global in January 2010. The subsidiary Arenasat ceased operation of its satellite package in September 2010.
(4) In December 2006, Liberty Global sold its interest in UPC Belgium to Telenet Group Holding N.V., the largest cable operator in Belgium. In a separate transaction, Liberty Global increased its ownership in Telenet to a controlling stake and on 31 March 2007 it owned 31.3%. Since March 2007, Liberty Global has progressively increased its ownership in Telenet to 51.1% as of 31 December 2007.
(5) Groupe Canal+ is a holding, part of the Vivendi group. The group has not published the individual accounts of subsidiaries since 2004.
(6) The merger with Canal Satellite was authorised by the Ministry of Economic Affairs as at 15.9.2006 and became effective in 2007. In September 2011 the Competition Authority has withdrawn the merger authorisation claiming that Canal+ did not respect various commitments. The group made an appeal to the Conceil d'Etat and case is pending.
(7) On 3 March 2006 ntl Incorporated completed a merger with Telewest Global, Inc. On 4 July 2006 ntl Incorporated completed its acquisition of Virgin Mobile, creating the first opportunity for customers in the UK to buy a 'quadruple-play'. The group was rebranded as Virgin Media. In June 2010 Virgin Media Inc sold the Virgin Media TV channels (Living, Livingit, Challenge, Challenge Jackpot, Bravo, Bravo 2 and Virgin1) to BskyB.
(8) In April 2008, Kabel Deutschland acquired the cable group Orion GmbH (EWT, Tele-Columbus GmbH).
(9) In March 2005, the company Ypso acquired France Télécom Câble, TDF Câble and NC Numericable. In November 2005 Cinven acquired Altice One, owner of Coditel in Belgium and Luxembourg and of Videocom in France. In July 2006, Ypso acquired Noos/UPC France. Since August 2007, Numericable has been the common brand. In March 2008, the US equity company, The Carlyle Group, acquired 37.85 % of the group Numericable-Completel.
(10) Service merged in 2003 with Canal Satélite Digital (Digi+). The company Canalsatelite Digital was merged within DTS in 2010.
(11) On 7 November 2005, Sogecable S.A. replaced the terrestrial pay-TV channel Canal+ España by Cuatro, a free-to air channel financed by advertising. Various Canal+ España channels continue to exist as satellite channels. The pay-TV activities of Sogecable S.A. were sold to Canal Satélite Digital S.L. on 31 July 2006. In 2010, the free-to-air channel Cuatro was sold to Gestevision telecinco (Mediaset group).
(12) News Corp. has progressively increased its stake in the capital of Premiere AG (45,4 % as at 18.1.2010). The company was rebranded as Sky Deutschland AG in May 2009.
(13) Zon Multimedia was born from the former multimedia division of the Portuguese incumbent telcos, PT. The split began in 2006 and was completed in November 2007.
(14) Tecteo Group is the new name of the electricity company «Association liégeoise d'électricité». The group has consolidated various local cable companies in Wallonia and has announced the purchase of the packaging company BETV. This purchase was operational early 2009.
(15) In 2006, the Carlyle Group and Providence Equity Partners acquired Com Hem and UPC Sverige and merged them under the name Com Hem AB.
(16) RCS & RDS is a provider of pay television and communication services in Central and Eastern Europe. The company has five principal segments: cable TV, broadband internet, fixed-line telephony, DTH satellite television and 3G mobile telephony services. The satellite packages Digi TV are accessible in CZ, HR, HU, RO, RS and SK.
(17) 2008 over 9 months.
(18) In 2006 Cabovisao was taken over by the Canadian company Cogeco Cable. Data are estimated (conversion in EUR of European revenues of Cogeca Cable in CAN as at 31 August of the year).
(19) The company was declared in receivership in June 2010, in the context of a dispute on ownership but is still active.
(20) Following an agreement between the Canal+ Group and the TVN S.A. group, the platform «n» operated by ITI Neovision was merged with Canal+ Cyfrowa.
(21) The cable assets were acquired by Telia Stofa A/S in 2011.
(22) Services with different linguistic versions are counted as different channels. Promo channels are also taken into consideration.
(23) Channels owned by the PRISA group.
(24) Channels owned by the companies of the Polaris Finance B.V. (Polsat) which is also the main shareholder of Polsat Cyfrowy SP.

Not included due to lack of information: Albasat (AL), DigitAlb (AL), Digitürk (TR), Canal Digitaal B.V. (NL). The Dutch company was taken over in 2007 by Providence Equity, a US investment fund also involved in Digitürk (TR), ONO (ES), TDC (Yousee) (DK) and Volia Cable (UA).

Source: European Audiovisual Observatory

T.5.2

# Digital TV reception in Europe

## As at 31.12.2010

In thousand TV households (Primary).

| Country | Number of digital TV households: Cable | Satellite (DTH) | Digital terrestrial | DSL (IPTV) | Total digital TV households *est.* | Total TV households | *Digital TVHH/ Total TVHH* |
|---|---|---|---|---|---|---|---|
| **AL** [1] | ~ | 200 | 100 | ~ | 300 | 701 | ***42.8%*** |
| **AT** | 748 | 1 872 | 144 | 154 | 2 918 | 3 453 | ***84.5%*** |
| **BE** | 1 461 | 329 | 225 | 789 | 2 803 | 4 557 | ***61.5%*** |
| **BG** | 348 | 682 | 0 | 8 | 1 038 | 2 700 | ***38.4%*** |
| **CH** | 702 | 262 | 106 | 407 | 1 477 | 3 161 | ***46.7%*** |
| **CY** | 3 | 12 | 0 | 50 | 65 | 284 | ***22.9%*** |
| **CZ** | 470 | 1 747 | 1 330 | 170 | 3 717 | 4 299 | ***86.5%*** |
| **DE** | 4 623 | 13 417 | 2 452 | 1 173 | 21 665 | 37 714 | ***57.4%*** |
| **DK** | 740 | 349 | 377 | 233 | 1 699 | 2 713 | ***62.6%*** |
| **EE** | 30 | 86 | 103 | 128 | 347 | 537 | ***64.6%*** |
| **ES** | 1 221 | 2 371 | 11 228 | 851 | 15 671 | 17 172 | ***91.3%*** |
| **FI** | 1 390 | 186 | 732 | 48 | 2 356 | 2 682 | ***87.8%*** |
| **FR** | 1 938 | 7 218 | 9 323 | 5 352 | 23 831 | 26 964 | ***88.4%*** |
| **GB** | 3 776 | 10 392 | 9 413 | 566 | 24 147 | 26 273 | ***91.9%*** |
| **GR** | 0 | 534 | 768 | 147 | 1 450 | 4 313 | ***33.6%*** |
| **HR** [2] | ~ | ~ | 965 | 343 | 1 308 | 1 592 | ***82.2%*** |
| **HU** | 450 | 944 | 162 | 151 | 1 705 | 3 671 | ***46.4%*** |
| **IE** | 317 | 674 | 0 | 17 | 1 008 | 1 649 | ***61.1%*** |
| **IS** [3] | ~ | ~ | ~ | ~ | 77 | 119 | ***64.7%*** |
| **IT** | 0 | 6 726 | 14 505 | 667 | 21 899 | 24 634 | ***88.9%*** |
| **LT** | 65 | 121 | 133 | 71 | 390 | 1 333 | ***29.3%*** |
| **LU** | 122 | 38 | 11 | 11 | 181 | 199 | ***91.0%*** |
| **LV** | 67 | 102 | 262 | 118 | 549 | 857 | ***64.1%*** |
| **MK** [4] | ~ | 1 | 90 | 64 | 155 | 502 | ***30.9%*** |
| **MT** | 58 | 4 | 54 | 0 | 116 | 138 | ***84.1%*** |
| **NL** | 2 940 | 689 | 820 | 445 | 4 894 | 7 241 | ***67.6%*** |
| **NO** | 454 | 746 | 430 | 174 | 1 802 | 2 158 | ***83.5%*** |
| **PL** | 1 088 | 7 685 | 60 | 181 | 9 015 | 12 959 | ***69.6%*** |
| **PT** | 1 074 | 759 | 531 | 605 | 2 969 | 3 915 | ***75.8%*** |
| **RO** | 400 | 2 503 | | 33 | 2 936 | 7 106 | ***41.3%*** |
| **RU** [5] | 1 600 | ~ | ~ | 500 | 7 400 | 64 678 | ***11.4%*** |
| **SE** | 853 | 804 | 892 | 471 | 3 022 | 4 138 | ***73.0%*** |
| **SI** | 74 | 65 | 163 | 199 | 501 | 797 | ***62.9%*** |
| **SK** | 138 | 785 | 50 | 117 | 1 090 | 1 742 | ***62.6%*** |
| **TR** | 198 | 8 938 | 0 | 6 | 9 142 | 19 111 | ***47.8%*** |
| ***EUR 27*** | ***24 394*** | ***61 094*** | ***53 738*** | ***12 755*** | ***151 982*** | ***204 040*** | ***74.5%*** |
| ***EUR 36*** | ***27 348*** | ***71 241*** | ***55 429*** | ***14 249*** | ***173 643*** | ***296 062*** | ***58.7%*** |

Source: Screen Digest, European Audiovisual Observatory

1. Estimates based on operator data from end 2009.
2. Data from the HAKOM, Croatia for end 2010.
3. Digital Household Data from Statistics Iceland as at 31.12.2010.
4. Agency for Electronic Communications, Report 2010.
5. Data from J'son & Partners Consulting/ European Audiovisual Observatory at 31.12.2010.

# Digital terrestrial television

By the end of 2011, 16 EU Member States had completed the transition from analogue to digital terrestrial broadcasting, including in 2011: Cyprus, the Czech Republic, France and Malta. In addition, Switzerland, Croatia, Norway and Iceland have also completed analogue switch-off (ASO) bringing the total to 20 country members of the European Audiovisual Observatory (see table T.5.4). In 2012, a further seven EU countries are expected to complete ASO (the United Kingdom, Greece, Ireland, Italy, Lithuania, Portugal and Slovakia).

ASO was first achieved in the countries where the most important means of reception is cable whereby a lower reliance on terrestrial television in the first place guaranteed an easier transition. By the end of 2011, many of the predominantly terrestrial countries have caught up in the process. In particular, the larger European countries with high levels of households using terrestrial television have made significant progress in the roll-out of DTT: at the end of 2011 in Italy and Spain more than 60% of homes were DTT only. In France and the UK 62% and 74% of homes, respectively, were using DTT in their homes (see table T.5.3).

Those countries where DTT has recently launched face the challenge of achieving ASO extremely quickly and this includes the challenge of raising consumer awareness. In 2010 and 2011 official launches took place in Poland and Ireland. In Ireland only the public service multiplex was launched, after three different groups turned down the licence for the commercial multiplex. The official launch in Poland was delayed due to legal issues regarding the selection of multiplex operators. For several countries, the ASO date has been postponed beyond the EU 2012 goal: Poland (2013); Bulgaria, Hungary and Romania (2015). In Hungary there is concern regarding public awareness, and also the expense of switch-over for households. The tender process for the multiplexes in Bulgaria has been investigated by the European Commission with a new tender planned for 2014. The situation in Romania is also uncertain after the cancellation of the tender process in August 2010. Bosnia and Herzegovina has also suffered a set-back with the tender being cancelled in November 2011 as the results were challenged in court. On the other hand, the late starters have the advantage of adopting more recent technological developments in transmission with almost all using MPEG-4 standard (required for HD signals). Those countries, which were the first to launch DTT, now need to switch from MPEG-2 to MPEG-4.

At the end of 2011, pay-TV platforms had been established in 19 (of the 37 countries

# Télévision numérique terrestre

Fin 2011, 16 Etats membres de Union européenne (UE) ont achevé la transition de la radiodiffusion terrestre analogique vers la radiodiffusion terrestre numérique, dont Chypre, la République tchèque, la France et Malte au cours de l'année 2011. En outre, la Suisse, la Croatie, la Norvège et l'Islande ont également abandonné l'analogique terrestre, soit un total de 20 pays membres de l'Observatoire européen de l'audiovisuel (voir tableau T.5.4). En 2012, sept autres pays de l'UE devraient les rejoindre (Royaume-Uni, Grèce, Irlande, Italie, Lituanie, Portugal et République slovaque).

L'extinction des transmissions analogiques a d'abord été opérée dans les pays où le principal mode de réception est le câble ; la moindre dépendance à l'égard de la télévision terrestre ayant facilité la transition. Fin 2011, de nombreux pays à prédominance terrestre ont rattrapé leur retard. Les grands pays européens, dans lesquels un pourcentage élevé de foyers est fidèle à la télévision terrestre, ont en particulier réalisé des progrès significatifs dans le déploiement de la TNT : fin 2011, plus de 60 % des foyers italiens et espagnols dépendent exclusivement de la TNT. En France et au Royaume-Uni, respectivement 62 % et 74 % des foyers reçoivent la TNT (voir tableau T.5.3).

Les pays où la TNT n'a été que récemment lancée doivent relever les défis d'un abandon extrêmement rapide de l'analogique et donc de l'information des consommateurs. En 2010 et 2011, des lancements officiels ont eu lieu en Pologne et en Irlande. En Irlande, seul le multiplex de service public a été lancé, après que trois groupes ont refusé la licence pour le multiplex commercial. Le lancement officiel en Pologne a été retardé en raison de problèmes juridiques liés à la sélection des opérateurs de multiplex. Dans plusieurs pays, la date d'abandon de l'analogique a été reportée au-delà de l'objectif de l'UE, fixé à 2012 : Pologne (2013) ; Bulgarie, Hongrie et Roumanie (2015). En Hongrie, l'information du public et les frais supportés par les foyers pour le passage au numérique suscitent une certaine inquiétude. En Bulgarie, l'appel d'offres pour les multiplex a été examiné par la Commission européenne et un nouvel appel d'offres est prévu en 2014. Après l'annulation de l'appel d'offres en août 2010, la situation en Roumanie est également incertaine. L'appel d'offres lancé en Bosnie-Herzégovine a également été annulé en novembre 2011, ses résultats ayant été contestés devant les tribunaux. Les pays retardataires ont en revanche l'avantage de pouvoir adopter une technologie de transmission plus récente : ils utilisent presque tous la norme MPEG-4 (requise pour les signaux HD), alors que les premiers pays à avoir lancé la TNT doivent désormais passer du MPEG-2 au MPEG-4.

# *Digitales terrestrisches Fernsehen*

Bis Ende 2011 hatten 16 EU-Mitgliedstaaten die Umstellung auf das digitale Antennenfernsehen abgeschlossen, darunter zuletzt 2011 Zypern, die Tschechische Republik, Frankreich und Malta. Zudem haben mit der Schweiz, Kroatien, Norwegen und Island vier weitere Mitgliedstaaten der Europäischen Audiovisuellen Informationsstelle (somit insgesamt 20) die vollständige Abschaltung des Analogbetriebs abgeschlossen (siehe Tabelle T.5.4). Weitere sieben EU-Mitgliedstaaten (Großbritannien, Griechenland, Irland, Italien, Litauen, Portugal und die Slowakei) dürften 2012 folgen.

Die Analogabschaltung ist als erstes in den Ländern erfolgt, in denen das Kabel die wichtigste Empfangsplattform ist und die somit niedrigere Abhängigkeit vom Antennenfernsehen eine problemlosere Umstellung auf DVB-T ermöglicht hat. Bis Ende 2011 haben aber viele der überwiegend „terrestrischen Länder" deutlich aufgeholt. Besonders einige der größeren Länder Europas mit einem hohen Anteil an terrestrischen Fernsehhaushalten haben bei der Einführung von DVBT deutliche Fortschritte erzielt: Ende 2011 nutzten über 60 % der Haushalte in Italien und Spanien ausschließlich DVB-T. In Frankreich und Großbritannien lag diese Quote bei 62 % bzw. 74 % (siehe Tabelle T.5.3).

Die Länder, in denen das DVB-T-Fernsehen erst unlängst an den Start gegangen ist, stehen nun vor der Herausforderung, die Analogabschaltung innerhalb kürzester Zeit zu schaffen. Dies setzt auch eine entsprechende Bewusstseinsbildung bei den Verbrauchern voraus. 2010 und 2011 wurde DVB-T offiziell in Polen und Irland eingeführt. In Irland wurde nur der öffentlich-rechtliche Multiplex in Betrieb genommen, nachdem drei verschiedene Unternehmen auf die Lizenz für den kommerziellen Multiplex verzichtet hatten. In Polen wurde der offizielle Startschuss wegen rechtlicher Probleme bei der Auswahl der Multiplex-Betreiber verschoben. In mehreren Ländern wurde die endgültige Analogabschaltung auf einen Termin nach 2012, dem Zieltermin der EU, verschoben, darunter Polen (2013) sowie Bulgarien, Ungarn und Rumänien (2015). In Ungarn gibt es Bedenken bzgl. der Aufklärung der Öffentlichkeit und der Kosten der Umstellung für die Haushalte. Das Ausschreibungsverfahren für die Multiplexe in Bulgarien wurde von der Europäischen Kommission einer Prüfung unterzogen, eine neue Ausschreibung ist für 2014 geplant. Auch in Rumänien ist die Situation nach der Aufhebung der Ausschreibung im August 2010 ungewiss. Bosnien und Herzegowina hat ebenfalls einen Rückschlag erlitten, als die entsprechende Ausschreibung gerichtlich angefochten wurde und covered in the Yearbook), with a total of 31 Pay-DTT services available (table T.5.5). The level of subscription to pay DTT services increased by 80% between 2007 and 2008, and again by 95% between 2008 and 2009 (table T.5.6). This growth seems to have stabilised (or the market matured) in 2010 as the overall increase was only 13%. At the same time some planned Pay-DTT services in Spain and Portugal have not materialised, services have ceased elsewhere (Italy) and in several smaller countries the development of a financially successful model for pay DTT is proving difficult.

According to data from the MAVISE database the number of channels available on DTT networks in the EU member states included the following: 391 free national or international channels; 457 pay channels, and approximately 1 056 local and regional channels. For the 37 countries of the European Audiovisual Observatory the equivalent numbers are: 415 free national or international, 605 pay, and approximately 1 083 local and regional channels (see table T.5.4 for details). The data suggest a positive development for regional and local television in the new digital age. However, it should be borne in mind that a very large number of these channels are based in Spain, Denmark and Italy. Regional and local channels are in many cases struggling to cope with the transition to digital television. The availability of High Definition services (HDTV) on DTT platforms continues to expand. Whereas at the end of 2009, HDTV was only available in two of the countries France and the United Kingdom) at the end of 2011 there were HD channels on the DTT platforms in eighteen European countries offering a combined total of almost 90 DTT channels. On-demand DTT services were available in the United Kingdom, France, Italy, Germany, Norway and Sweden (see chapter 7).

Fin 2011, des plates-formes de TNT payante sont établies dans 19 pays (sur les 37 couverts par l'Annuaire), soit un total de 31 services disponibles (T.5.5). Le nombre d'abonnements aux services de TNT payante a augmenté de 80 % entre 2007 et 2008, et encore de 95 % entre 2008 et 2009 (tableau T.5.6). Cette croissance semble s'être stabilisée (ou le marché a mûri) en 2010, l'augmentation n'étant que de 13 %. Dans le même temps certains services de TNT payante prévus en Espagne et au Portugal ne se sont pas matérialisés, des services ont été arrêtés ailleurs (Italie) et dans plusieurs petits pays, le développement d'un modèle financièrement viable pour la TNT payante se révèle difficile.

Selon les données de la base de données MAVISE, le nombre de chaînes disponibles sur les réseaux TNT dans les Etats membres de l'UE est le suivant : 391 chaînes nationales ou internationales gratuites, 457 chaînes payantes et environ 1 056 chaînes locales et régionales. Et pour les 37 pays de l'Observatoire européen de l'audiovisuel : 415 chaînes nationales ou internationales gratuites, 605 payantes et environ 1 083 chaînes locales et régionales (voir tableau T.5.4 pour les détails). Ces données suggèrent une évolution positive pour la télévision régionale et locale dans la nouvelle ère numérique. Toutefois, il convient de garder à l'esprit qu'un très grand nombre de ces chaînes est basé en Espagne, au Danemark et en Italie. Les chaînes locales et régionales ont souvent des difficultés pour faire face à la transition vers la télévision numérique. La disponibilité des services haute définition (HDTV) sur les plates-formes TNT continue de progresser. Alors que fin 2009, la HDTV n'était disponible que dans deux pays (en France et au Royaume-Uni), fin 2011, les plates-formes TNT comptent des chaînes HD dans 18 pays européens, pour un total de presque 90 chaînes TNT. Des services TNT à la demande sont disponibles au Royaume-Uni, France, Italie, Allemagne, Norvège, Suède (voir chapitre 7).

im November 2011 annulliert werden musste. Andererseits haben die Spätstarter den Vorteil, dass sie auf die jüngsten Entwicklungen in der Übertragungstechnik zurückgreifen können und praktisch alle den (für HD-Signale notwendigen) MPEG-4-Standard übernommen haben. Dagegen müssen die Länder, die als erste DVB-T eingeführt haben, nun von MPEG-2 auf MPEG-4 umstellen.

Ende 2011 gab es in 19 der 37 untersuchten Länder PayTVPlattformen mit insgesamt 31 PayDVBTDiensten (siehe Tabelle T.5.5). Die Zahl der PayDVBT-Abonnenten ist zwischen 2007 und 2008 um 80 % und zwischen 2008 und 2009 nochmal um 95 % gestiegen (Tabelle T.5.6). Dieses Wachstum scheint sich aber 2010 mit einem Anstieg von insgesamt nur noch 13 % wieder beruhigt zu haben (bzw. der Markt ist gereift). Gleichzeitig konnten einige geplante DVBTDienste in Spanien und Portugal nicht an den Start gehen, andernorts wurden Dienste ganz eingestellt (Italien) und in einigen kleineren Ländern erweist sich die Entwicklung eines lebensfähigen Geschäftsmodels für PayDVBT als schwierig.

Laut MAVISE-Datenbank umfasst das in der EU verfügbare DVB-T-Angebot 391 frei empfangbare nationale oder internationale Kanäle, 457 Pay-TV-Kanäle sowie ungefähr 1 056 lokale und regionale Kanäle. Auf die 37 Mitglieder der Europäischen Audiovisuellen Informationsstelle entfallen 415 frei empfangbare nationale oder internationale, 605 Pay-TV-sowie ungefähr 1 083 lokale und regionale Kanäle (näheres siehe Tabelle T.5.4). Die Zahlen lassen eine positive Entwicklung für lokale und regionale Fernsehsender im neuen digitalen Zeitalter erwarten. Zu beachten ist jedoch, dass sehr viele dieser Kanäle ihren Sitz in Spanien, Dänemark und Italien haben. In vielen Fällen haben regionale und lokale Kanäle durchaus große Schwierigkeiten mit der Umstelllung auf das Digitalfernsehen. Die Verfügbarkeit von HDTVDiensten über DVBT nimmt weiter zu. Während es 2009 nur in Frankreich und im Vereinigten Königreich HDTVDienste gab, wurden bis Ende 2011 in 18 Ländern Europas HD-Kanäle über DVB-T sowie insgesamt fast 90 DVB-T-Sender angeboten. On-Demand Dienste über DVB-T gibt es bereits in Großbritannien, Frankreich, Italien, Deutschland, Norwegen, Schweden (sehe Kapitel 7).

Source: European Audiovisual Observatory

T.5.3

## Number of DTT Households 2010-2011

| Country | DTT primary HH % | DTT primary HH Thousand | DTT HHs (including second set) % | DTT HHs (including second set) Thousand | DTT equipment sold Thousand | DTT coverage | Date | Source |
|---|---|---|---|---|---|---|---|---|
| AL | | | | 180 | | | 12.10 | Digitalb Pay DTT operator |
| AT | 5.0% | 180 | 9.6% | 349 | | 99% | 11.11 | RTR - KommAustria (regulatory authority) |
| BE | 4.9% | 225 | | | | | 12.10 | Screen Digest / OBS |
| CH | | | 7.0% | 221 | | | 12.10 | Publicadata AG |
| CZ | | | 50.0% | 1 790 | | 99% | 11.11 | ATO (Asociace televizních organizací) / MEDIARESEARCH a.s. |
| DE | 4.4% | 1 657 | 11.8% | 4 445 | | 100% | 07.11 | ALM (Association of State Media Authorities) (regulatory authority) |
| DK | 13.0% | 372 | 18.7% | 468 | | | 09.11 | Bibliotek og Medier (regulatory authority) / TNS Gallup / OBS |
| EE | 18.6% | 103 | | | | | 12.10 | Screen Digest / OBS |
| ES | 65.4% | 11 228 | | | 33 500 (Apr. 2010) | 99% | 12.10 | Spanish government / Impulsa TDT / Screen Digest / OBS |
| FI | 26.5% | 732 | | | | 99.9% | 12.10 | Screen Digest / Digi-TV / OBS |
| FR | | | 62.6% | 16 800 | | | 06.11 | CSA Observatoire télévision numérique Q2 2011 (regulatory authority) / OBS |
| GB | 39.6% | 10 100 | 74.0% | 19 000 | 30 700 | 85% | 03.11 | Ofcom Digital Progress Report Q1 2011 (regulatory authority) |
| GR | 17.6% | 768 | | | | | 12.10 | Screen Digest / OBS |
| HR | 55.0% | 897.4 | 61.0% | 1 000 | | 98% | 10.11 | HAKOM (regulatory authority) Q3 2011 |
| HU | | | 10.0% | 344 | | 95% | 12.11 | Antenna Hungária (DTT operator. free and pay homes) |
| IT | 63.4% | 15 775 | | | 53 926 | | 09.11 | DGTVI / GfK / OBS |
| LT | 9.6% | 133 | | | | | 12.10 | Screen Digest / OBS |
| LU | 5.40% | 11 | | | | | 12.10 | Screen Digest / OBS |
| LV | 30.6 | 262 | | | | 90% | 12.10 | Screen Digest / OBS |
| MK | | | 17.6% | 90 | | | 12.10 | Agency for Electronic Communications (Annual Report) |
| MT | 17.4% | 24 | 39.4% | 55 | | | 09.10 | Broadcasting Authority of Malta / European |
| NL | 11.2% | 820 | | | | | 12.10 | Screen Digest / OBS |
| NO | 19.5% | 430 | | | | | 12.10 | Screen Digest / OBS |
| PL | 0.5% | 60 | | | | | 12.10 | Screen Digest / OBS |
| PT | 13.5% | 531 | | | | 87% | 12.10 | Screen Digest / OBS |
| SE | 20% | 1 000 | 34.0% | 1 666 | | 99% | 12.10 | The Swedish Radio and TV Authority / OBS |
| SI | 17% | 136 | | | | | 03.11 | Post and Electronic Communication Agency of the Republic of Slovenia |
| SK | 2.9% | 50 | | | | | 12.10 | Screen Digest / OBS |

No data for Bulgaria, Cyprus, Ireland, Romania and Turkey where services launched in 2010/2011, or are planned to launch later.
No data available for Iceland and Russia.

Source: European Audiovisual Observatory

T.5.4

## Implementation of digital terrestrial television in Europe
## December 2011

| Country | Service Launch | Regional ASO | ASO Date | Business Model | Number of multiplexes | Multiplex operators and/or free DTT packagers |
|---|---|---|---|---|---|---|
| **Switch-off complete** | | | | | | |
| **AT** | **2006** | Complete | **2010/2011** | FTA (+ PayTV planned) | 4 currently (2 national, 1 regional, 1 for mobile services) /2 to launch 2012 | 14: 1 national (ORS) and 13 operators for 16 regional areas |
| **BE** | **2002** | Complete | **2010** | FTA (+ PayTV planned) | Flemish Community: 1 currently / 6 planned; French Community: 1 currently | 2: Norkring Belgie (25% owned by the VRT), RTBF |
| **CH** | **2001** | Complete | **2008** | FTA + PayTV | 6 | 1: SRG-SSR idée suisse. In addition, most of the Swiss cable operators (except for Cablecom) offer free DVB-T packages via their networks. |
| **CZ** | **2005** | Complete (December 2011) | **2011** | FTA | 4 currently | 2: Czech Digital Group, Radiocumikace, Telefonica O2. Radiocumikace took over Czech Digital Group in 2010. |
| **CY** | **2010** | Complete (June 2011) | **2011** | FTA + PayTV | 3 currently / 6 planned | 2: CyBC (Cyprus public broadcaster) has launched the free DTT platform in March 2010 and broadcast the public channels ; the consortium Velister Ltd won the competition to run the MUX carrying free-to-air private channels. |
| **DE** | **2002** | Complete | **2008** | FTA + PayTV | 4 currently | 10: Media Broadcast and 9 ARD regional stations |
| **DK** | **2006** | Complete | **2009** | FTA + PayTV | 5 currently (Boxer announced the launch of a 6th MUX for 2010, but it did not happen end 2011) | 2: Digi TV, jointly owned by DR and TV 2, operates MUX 1&2 (Free DTT), Boxer (Teracom) runs the others |
| **EE** | **2006** | Complete | **2010** | FTA + PayTV | 3 currently | 1: Levira (Estonian State/TDF) |
| **ES** | **2000** | Complete | **2010** | FTA + PayTV | 9 national + 2 to 4 regional and local | > 5 transmission companies (Grup Abertis (Retevision), Axion, Itelazpi, Teledifusion Madrid, Retegal etc.) + 6 national MUX operators (RTVE, Antenna 3 de television, Telecinco, La Sexta, Veo Television, Net TV) |
| **FI** | **2001** | Complete | **2007** | FTA + PayTV | 9 currently (+1 for mobile TV which should be used for DTT in 2012) | 3: Digita (TDF) (4 MUX), DNA Finland (3 MUX), Anvia (2 MUX) |
| **FR** | **2005** | Complete (November 2011) | **2011** | FTA + PayTV | 6 currently | 6: Société de gestion du réseau R1 (MUX 1), Nouvelles télévisions numériques (MUX 2), Société opératrice du multiplex R4 (MUX 4), Société du réseau de fréquences de télévision numérique terrestre R5 (MUX 5), Société d'exploitation du multiplex R6 (MUX 6) |
| **HR** | **2007** | Complete | **2010/2011** | FTA | 3 currently / 8 planned | 1: Odašiljači Veze |
| **IS** | **2005** | Complete | **2011** | PayTV (+ FTA planned) | 2 currently / 5 planned | Vodafone (Dagsbrún group) runs 2 MUX. RUV-TV (Public broadcaster) was attributed the licence to operate 3 other MUX in 2005 but has launched nothing yet. |
| **LU** | **2006** | Complete | **2006** | FTA | 4 currently | 1: BCE - Broadcasting Center Europe (RTL group) |
| **LV** | **2009** | Complete | **2010** | FTA + PayTV | 7 currently | 1: Digitalais Latvijas Run TV Centrs |
| **MT** | **2005** | Complete (November 2011) | **2011** | FTA + PayTV | 5 currently | 2: Public Broadcasting Services Ltd. (MUX for FTA channel), Go |
| **NL** | **2003** | Complete | **2006** | FTA + PayTV | 4 currently | 1: KPN |
| **NO** | **2007** | Complete | **2009** | FTA + PayTV | 5 currently | 2: Norkrings (Telenor) owns the network, Norges Televisjon - NTV (NRK, Tele2, Telenor) operates the network |

FTA : Free-to-air.

| Pay DTT packagers | Standards | National free channels (public/private) | National pay channels | Local channels | HD channels |
|---|---|---|---|---|---|
| | | | | | |
| (ORS plans to launch a Pay TV service in 2012 called TV Direkt for DVB-T2 and DTH) | MPEG-2 (DVB-T2 to be used for two new MUXs) | 8, of which 4 public | No | 33 (including 10 windows) | No |
| (Telenet is expected to launch a pay DTT platform in the Flemish Community of Belgium. Announced in Nov. 2010, it had still not been launched end 2011) | MPEG-2 | Flemish Community 5 (of which 4 public) / French Community 5 (all public) | No | No | No |
| | MPEG-2 | 4 public channels per linguistic area (except in the German speaking region: 5 channels) | No | ~ | ~ |
| Rio Media (uses DVB-T to distribute digital version of cable package in some cities) | MPEG-2 / one MUX with MPEG-4 AVC (DVB-T2 trials) | 13, of which 5 public | No | No | Yes (trials on MUX 4) |
| 1: Lumiere TV | MPEG-4 AVC | 13, of which 5 public | 6 | No | Yes |
| 1: "Viseo+" from Eutelsat Vision GmbH/ RTL (just in Dresden and Stuttgart) | MPEG-2 / MPEG-4 for PayTV (DVB-T2 trials) | 35, of which 11 public, 3 international ( Private channels not available in all regions). | 2 (RTL Passion and RTL Crime) | 17 local and regional (+22 windows) | No |
| 1: Boxer (Teracom) | MPEG-2 for MUX 1/ MPEG-4 for the others. DVB-T2 expected in April 2012. | 8 (all public) | 30 | 195 local | Yes |
| 1: Starman | MPEG-4 AVC | 5, of which 3 public | 40 | No | No |
| 2: La Sexta (Gol TV), Veo Television (AXN) | MPEG-2 / MPEG-4 for HDTV | 31, of which 5 public. (includes 4 HD simulcast) | 2 | Between 400 and 500 (network foreseen for >1000 : 2 to 12 regional channels per region, up to 4 local per area) | Yes |
| 3: Digi TV Plus "Plus TV" (Teracom), TDF entertainment (TDF), DNA Finland | MPEG-2 / MPEG-4. DNA and Anvia MUX launched in 2011 use DVB-T2 standard. | 16, of which 5 public. (Includes 1 HD simulcast) | 29 | 1 regional | Yes |
| 2: Canal+ Distribution, TV Numeric | MPEG-2 / MPEG-4 for PayTV and HDTV | 24, of which 8 public. (includes 4 HD simulcast) | 11 (includes 1 HD simulcast) | 50 regional/local | Yes |
| | MPEG-2 (DVBT-2 trials) | 10, of which 3 public | No | 21 (MUX D) | Yes (trials) |
| 1: Vodafone (Dagsbrún group) | MPEG-4 AVC | 0 | 9 or 19 (depending on location) | No | No |
| | MPEG-2 / MPEG-4 | 13, of which 0 public. (includes 1 HD simulcast) | No | No | Yes |
| 1: Lattelecom (TeliaSonera) | MPEG-4 AVC | 4, of which 2 public | 75 (includes >20 linguistic versions) | 5 | Yes |
| 1: Go | MPEG-2 | 6, of which 2 public | 59 | No | No |
| 7: KPN, Caiw Diensten, EDPnet, Scarlet, TELE2, Technos, T-Mobile | MPEG-2 | 3 (all public) | 27 | 13 regional | No |
| 1: Riks TV | MPEG-4 AVC | 4, of which 4 public | 38 | about 25 | Yes |

T.5.4

## Implementation of digital terrestrial television in Europe (Continued)
## December 2011

| Country | Service Launch | Regional ASO | ASO Date | Business Model | Number of multiplexes | Multiplex operators and/or free DTT packagers |
|---|---|---|---|---|---|---|
| **Switch-off complete (continued)** | | | | | | |
| **SE** | **1999** | Complete | **2007** | FTA + PayTV | 7 currently | 1: Teracom |
| **SI** | **2006** | Complete | **2010/2011** | FTA | 2 currently / 6 planned | 2: RTV SLO, Norkring (and 6 local MUX operators) |
| **Switch-off 2012** | | | | | | |
| **AL** | **2003** | | **2012** | PayTV (operates without licence) | 4 currently / 7 planned | n/a |
| **GB** | **1998** | Switch-off complete in 11 of 15 regions by end 2011 | **2012** | FTA + PayTV | 6 currently | 5 MUX operators + 1 free DTT packager (DTV Services/Freeview) |
| **GR** | **2006** | | **2012** | FTA | 5 currently | 2: ERT (public channels), Digea (private channels) |
| **HU** | **2008** | | **2012 or 2014** | FTA + PayTV | 6 total (one for radio). | 1: Antenna Hungaria ("Minidig") |
| **IE** | **2010 (officially 2011)** | | **2012** | FTA (PayTV postponed) | 1 currently / 6 planned | 1: Public service MUX launched by RTÉ in 2011 |
| **IT** | **2003** | Switch-off complete in 14 of 20 regions by end 2011 | **2012** | FTA + PayTV | 10 (where ASO not occured) / 18 (where ASO occured) | 6 MUX operators (Rai Way, Elettronica Industriale (Mediaset), Telecom Italia, Prima TV, Rete A, Tivultalia) + 1 free DTT packager : Tivu |
| **LT** | **2006** | | **2012** | FTA + PayTV | 4 currently | 2: Lietuvos radijo ir televizijos centras, Teo LT (TeliaSonera) |
| **PT** | **2009** | Switch-off to take place in 3 phases from January to April 2012 | **2012** | FTA (+ PayTV postponed) | 1 currently / 6 planned | 1: Portugal Telecom (no longer launching PayTV) |
| **SK** | **2009** | | **2012** | FTA (+ PayTV to be launched) | 4 (tender for 4th launched in November 2011, and won by Towercom) | 1: Towercom |
| **Switch-off after 2012** | | | | | | |
| **MK** | **2009** | | **n/a** | FTA + PayTV | 3 currently | 1: One (Cosmofon/ Germanos/ On.net) |
| **PL** | **2009 (officially 2010)** | | **2013** | FTA | 3 currently / 8 planned | 1: TP Emitel (sold by France Telecom to EM Bidco) |
| **RU** | **2009** | | **2015** (may be delayed) | FTA | 1 currently / 3 planned | 1: RTRS (national transmission company) |
| **Launch expected 2012** | | | | | | |
| **BA** | | | **2015** | | | |
| **BG** | | | **2013** | (FTA + PayTV planned) | (5 commercial and 1 public service are planned) | Towercom: 2 national commercial MUX. Hannu Pro: 3 national commercial MUX and 1 public service MUX. (New tender to be launched by 2014) |
| **RO** | | | **2015** | | | 2: Radiocommunicatii, Romkatel (tenders cancelled) |
| **TR** | | | **2015** | | | Anten A.S. |

FTA : Free-to-air.

| Pay DTT packagers | Standards | National free channels (public/private) | National pay channels | Local channels | HD channels |
|---|---|---|---|---|---|
| | | | | | |
| 1: Boxer TV-Access (Teracom) | MPEG-2 / MPEG-4. MUX 6 and 7 use DVB-T2 standard. | 10, of which 8 public. (includes 2 HD simulcast) | 42 | No | Yes |
| | MPEG-4 AVC | 7, of which 3 public | No | 4 regional / 6 local | Trials |
| | | | | | |
| | | | | | |
| 1: DigitAlb (Top Media group) runs 4 MUX without any license | MPEG-4 AVC | No | 48 | No | Yes (8 channels) |
| Top-up TV | MPEG-2 / DVB-T2 used for HDTV | 50, of which 17 public, and 2 international news (Freeview) | 5 + 2 VOD services | 9 regional (and 45 windows) | Yes in switched off areas (6 channels) |
| | MPEG-2 / MPEG-4 | 16, of which 9 public. (includes 1 HD simulcast) | No | Yes | Yes |
| 1: Antenna Hungaria ("Minidig Extra") | MPEG-4 AVC | 8 national, of which 6 are public (3 HD public), plus 3 versions of Euronews | 24 | No | Yes |
| (Commercial DTT launch postponed after operator handed back licence. May be launched after switch-off) | MPEG-4 AVC | 8, of which 6 public | No | No | Yes |
| 2 national pay DTT packagers: Centro Europa 7, Elettronica Industriale "Mediaset Premium" + several regional pay DTT packagers: Profit Group, Conto TV, Pangea etc. | MPEG-2 / MPEG-4. DVB-T2 for the MUX used by Centro Europa 7 | >60, of which 16 public. (includes several HD simulcast) | Mediaset Premium : 30 / Centro Europa 7 : 15 | >200 regional/local | Yes |
| 2: Teo LT (TeliaSonera), Balticum TV (in Vilnius only) | MPEG-4 AVC | 14, of which 4 public | Teo : 45 (includes >15 linguistic versions) / Balticum : 15 (includes 4 linguistic versions) | No | Yes (Teo platform only) |
| (Commercial DTT launch postponed) | MPEG-4 AVC | 4, of which 2 public | No | 2 regional in autonomous regions | No |
| | MPEG-2 / MPEG-4 planned for payTV | 6, of which 2 public | No | (Licences issued for regional channels) | No |
| | | | | | |
| | | | | | |
| 1: One "Boom TV" (Cosmofon/ Germanos/ On.net) | MPEG-4 AVC | 8 | 43 | 2 | No |
| | MPEG-4 AVC | 16, of which 6 public | No | No | No |
| | MPEG-4 AVC | 8 (all public or mixed) | No | (Regional channels expected on MUX1 in 2012) | No |
| | | | | | |
| | | | | | |
| (Tender for MUXs cancelled in November 2011) | | | | | |
| European Commission investigating tenders. (New tender to be launched) | MPEG-4 AVC | (licences awarded to 23 national and one regional - DTT not yet launched) | | | |
| (Tender for MUXs cancelled in August 2010/ switch-off deadline extended from 2013 to 2015) | MPEG-4 AVC | | | | |
| | | | | | |

Source : European Audiovisual Observatory

T.5.5

# Operators of pay-DTT services in Europe
## End 2011

| Country | Company | Group | Name of the service | Date of launch | Pay channels (1) | Free channels (1) | Number of subscribers (thousand) |
|---|---|---|---|---|---|---|---|
| **AL** | DigitAlb | DigitAlb | DigitAlb | 2004 | 48 | 0 | 180 (12.2010) |
| **CY** | Lumiere TV Ltd | | LTV terrestrial | 2011 (2) | 6 | 13 | ~ |
| **DE** | Eutelsat Visavision GmbH | | Viseo+ | 2009 | 2 | 17 (Stuttgart) | ~ |
| **DK** | Boxer A/S | Teracom | Boxer | 2009 | 30 | 8 | 90 (09.2011) |
| **EE** | Starman AS | | ZuumTV | 2006 | 40 | 5 | ~ |
| **ES** | Gol Television S.L. | Televisa / Gamp (Mediapro) | Gol TV | 2009 | 1 | 31 | 373 (09.2011) |
| | Veo Television S.A. | | AXN | 2010 | 1 | 31 | ~ |
| **FI** | Digi TV Plus Oy | Teracom | Plus TV | 2006 | 20 | 16 | 225 (09.2011) |
| | DNA Finland Oy | | DNA Antenni TV | 2011 | 16 | 16 | ~ |
| | TDF Entertainment Oy | TDF | TV Viihde | 2011 | 15 | 16 | ~ |
| **FR** | Canal+ Distribution S.A.S. | Vivendi | Canal+/ Canalsat 3 étoiles | 2005 | 10 | 24 | 1 000 (12.2010) |
| | TV Numeric SAS | | TV NUM (3) | 2007 | 10 | 24 | 100 (12.2010) |
| **GB** | Top-Up TV Ltd | | Top Up TV | 2004 | 3 (4) | 61 | 300 (03.2011) |
| **HU** | Antenna Hungaria R.T. | | MinDig Extra TV | 2010 | 24 | 11 | 42 (11.2011) |
| **IS** | Vodafone | Dagsbrún group | Digital Ísland | ~ | 9 or 19 | 0 | ~ |
| **IT** (5) | Centro Europa 7 S.R.L. | | Europa 7 HD | 2010 | 15 | >60 | ~ |
| | Elettronica Industriale S.P.A. | Mediaset | Mediaset Premium | 2005 | 30 | >60 | 2 900 (09.2011) |
| **LT** | Balticum | | Balticum TV | n/a | 15 | 14 | 1 (09.2011) |
| | Teo LT AB | TeliaSonera | Gala Digital | 2006 | 45 | 14 | 71 (09.2011) |
| **LV** | Lattelecom SIA | Latvian State / TeliaSonera | Lattelecom Virszemes TV | 2009 | 75 | 4 | 115 (12.2010) |
| **MK** | One | Cosmofon/ Germanos/ On.net | Boom TV | 2009 | 43 | 8 | 90 (12.2010) |
| **MT** | GO PLC | | Go TV | 2005 | 59 | 6 | 60 (12.2010) |
| **NL** | Caiw Diensten B.V. | CAIW Holding BV | CaiWay DVB-T | 2010 | 27 | 3 | ~ |
| | EDPnet B.V. | EDPnet | EDPNet DigiTV | 2009 | 27 | 3 | ~ |
| | KPN N.V. | KPN | Digitenne | 2003 | 27 | 3 | 895 (12.2010) |
| | Scarlet Telecom B.V. | | Scarlet Digitale TV | 2010 | 27 | 3 | ~ |
| | Technos B.V. | | DigiTV | 2010 | 27 | 3 | ~ |
| | Tele2 Nederland B.V. | Tele2 | Tele2 via Digitenne | 2010 | 27 | 3 | ~ |
| | T-Mobile Netherlands B.V. | | Digitale TV Digitenne | 2011 | 27 | 3 | ~ |
| **NO** | RiksTV AS | NRK / TV 2 / Telenor | Riks TV | 2007 | 38 | 4 | 480 (12.2010) |
| **SE** | Boxer TV-Access AB | Teracom | Boxer TV | 1999 | 42 | 10 | 626 (09.2011) |

(1) Does not include the regional and local channels.
(2) Lumiere TV operated an analogue terrestrial premium channel before the transition to DTT.
(3) The package TV Numeric was merged with TNTop in 2011 and they became TV NUM.
(4) And also 2 VOD services.
(5) In addition several regional pay DTT packagers are operating in Italy (Profit Group, Conto TV, Pangea etc.)

End 2011, there were no pay DTT platforms in Austria, Belgium, Bosnia and Herzegovina, Bulgaria, the Czech Republic, Greece, Croatia, Ireland, Liechtenstein, Luxembourg, Poland, Portugal, Romania, the Russian Federation, Switzerland, Slovenia, the Slovak Republic and Turkey.

Source: European Audiovisual Observatory, MAVISE database

T.5.6
G.5.2

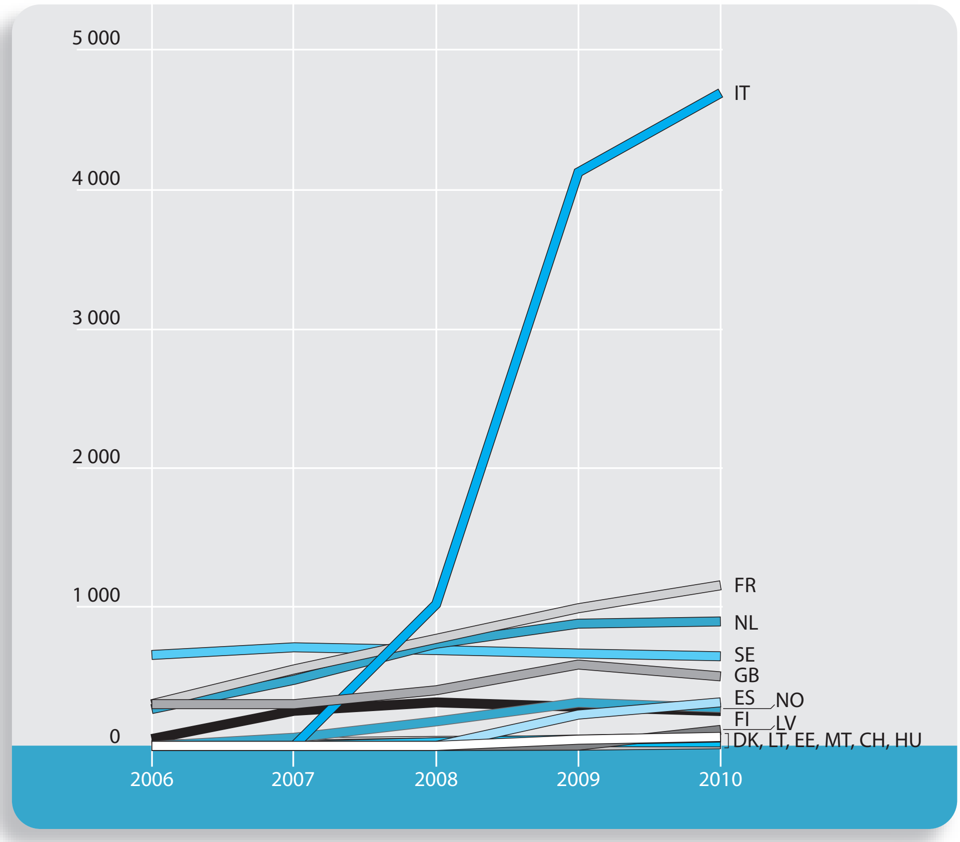
## Number of subscribers to pay-DTT services in Europe 2006-2010

In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **CH** | 0.0 | 0.0 | 27.0 | 26.7 | 25.4 | ***-5.0%*** |
| **DK** | 0.0 | 0.0 | 0.0 | 44.8 | 64.8 | ***44.7%*** |
| **EE** | 0.5 | 10.0 | 26.0 | 43.0 | 63.0 | ***46.5%*** |
| **ES** | 0.0 | 0.0 | 0.0 | 153.2 | 313.2 | ***104.5%*** |
| **FI** | 50.0 | 252.0 | 313.0 | 281.2 | 250.2 | ***-11.0%*** |
| **FR** | 300.0 | 550.0 | 770.0 | 990.0 | 1 155.0 | ***16.7%*** |
| **GB** | 300.0 | 300.0 | 400.0 | 585.0 | 500.0 | ***-14.5%*** |
| **HU** | 0.0 | 0.0 | 0.0 | 1.0 | 12.0 | ***1 100.0%*** |
| **IT** | 0.0 | 0.0 | 1 018.9 | 4 055.0 | 4 695.0 | ***15.8%*** |
| **LT** | 0.0 | 0.0 | 26.3 | 46.0 | 63.3 | ***37.6%*** |
| **LV** | 0.0 | 0.0 | 0.0 | 7.0 | 115.0 | ***1 542.9%*** |
| **MT** | 9.0 | 25.0 | 36.0 | 45.0 | 60.0 | ***34.4%*** |
| **NL** | 265.0 | 475.0 | 735.0 | 878.0 | 895.0 | ***1.9%*** |
| **NO** | 0.0 | 58.7 | 176.0 | 258.8 | 273.8 | ***5.8%*** |
| **SE** | 654.0 | 709.0 | 689.0 | 664.5 | 644.5 | ***-3.0%*** |
| ***Total EUR 27*** | ***1 578.5*** | ***2 321.0*** | ***4 014.2*** | ***7 793.6*** | ***8 831.4*** | ***13.3%*** |
| ***Total EUR 37*** | ***1 578.5*** | ***2 379.7*** | ***4 217.2*** | ***8 079.1*** | ***9 130.5*** | ***13.0%*** |

Source: Screen Digest

In thousand.



T.5.7

## Operating revenues of DTT pay-TV "pure players" operators 2006-2010 EUR million.

| Operator | Country | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|
| **Boxer TV-Access AB** | **SE** | 171.7 | 193.3 | 180.8 | 199.1 | 227.6 | ***14.3%*** |
| **Rikstv AS** | **NO** | – | 7.0 | 41.7 | 69.0 | 114.6 | ***66.1%*** |
| **Dahlia TV S.R.L.** [1] | **IT** | – | – | 0.7 | 87.4 | 66.0 | ***-24.5%*** |
| **Digi TV Plus Oy** | **FI** | 0.4 | 19.8 | 52.4 | 58.2 | 62.1 | ***6.7%*** |
| **Prima TV S.P.A.** | **IT** | 22.2 | 27.8 | 37.4 | 47.9 | 38.2 | ***-20.3%*** |
| **Veo Television S.A.** | **ES** | 3.7 | 6.9 | 15.1 | 13.2 | 31.5 | ***138.6%*** |
| **Boxer TV A/S** | **DK** | – | – | – | 4.0 | 16.4 | ***310.0%*** |
| **TV Numeric** | **FR** | – | – | – | – | 3.0 | – |
| **Centro Europa 7** | **IT** | | 5.7 | 2.7 | 1.7 | 1.4 | ***-17.6%*** |
| **Dahlia Television S.A.** [2] | **ES** | – | 0.0 | 0.2 | 0.0 | – | – |

[1] Bankruptcy in March 2011. [2] Service closed in January 2010.

Source: European Audiovisual Observatory

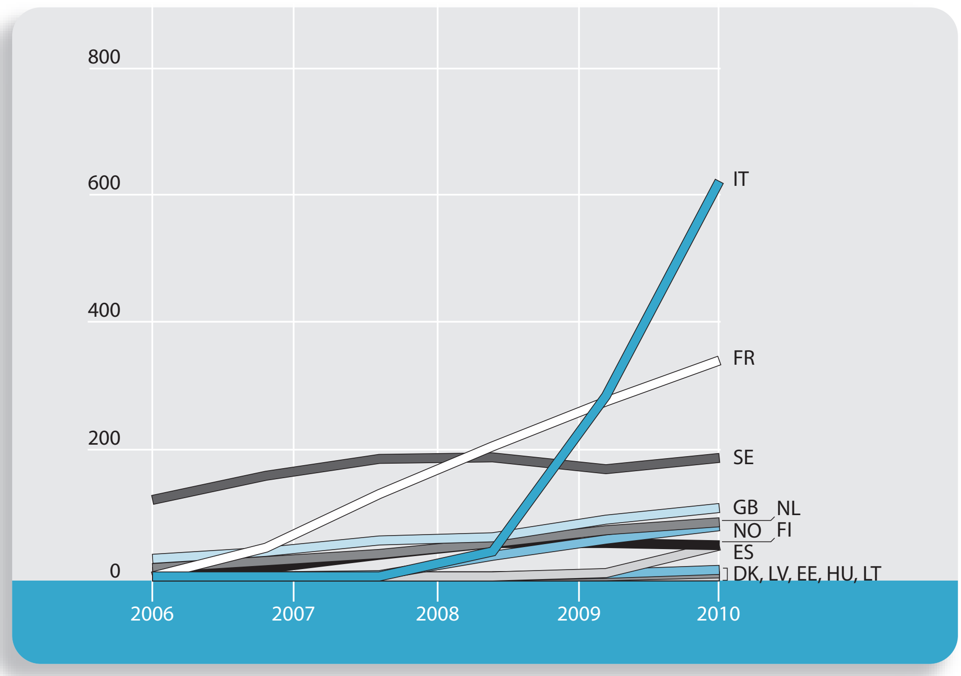
T.5.8
G.5.3

## Total pay DTT consumer spend on subscription 2005-2010 EUR million.

| Country | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|
| **DK** | 0.0 | 0.0 | 0.0 | 0.0 | 4.0 | 10.3 | ***157.5%*** |
| **EE** | 0.0 | 0.0 | | 0.1 | 0.2 | 0.3 | ***57.1%*** |
| **ES** | 0.0 | 0.0 | 0.0 | 0.0 | 5.3 | 48.4 | ***819.3%*** |
| **FI** | 7.3 | 12.4 | 33.9 | 52.4 | 52.4 | 49.0 | ***-6.5%*** |
| **FR** | 0.0 | 45.1 | 129.4 | 204.4 | 275.0 | 339.3 | ***23.4%*** |
| **GB** | 27.7 | 38.7 | 56.5 | 61.5 | 89.2 | 107.5 | ***20.6%*** |
| **HU** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 | – |
| **IT** | 0.0 | 0.0 | 0.0 | 39.2 | 283.6 | 620.9 | ***119.0%*** |
| **LT** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | ***37.0%*** |
| **LV** | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 | 4.8 | ***1 771.5%*** |
| **NL** | 13.1 | 24.1 | 35.3 | 52.5 | 72.6 | 85.1 | ***17.2%*** |
| **NO** | 0.0 | 0.0 | 2.0 | 32.4 | 58.0 | 78.9 | ***36.0%*** |
| **SE** | 120.3 | 158.2 | 184.7 | 187.1 | 168.5 | 186.2 | ***10.5%*** |
| ***EUR 27*** | ***168.4*** | ***278.4*** | ***439.8*** | ***597.1*** | ***951.0*** | ***1 452.0*** | ***52.7%*** |
| ***EUR 37*** | ***168.4*** | ***278.4*** | ***441.8*** | ***629.5*** | ***1 009.0*** | ***1 530.9*** | ***51.7%*** |

Source: Screen Digest

EUR million.



# Satellite television

For several years the satellite TV market has been experiencing a boom, especially in countries where DTT services were slow to emerge: Bulgaria, Ireland, Poland, Romania and Russia. Many countries have witnessed growth in satellite subscriptions and also in the number of services available. Some have very competitive markets, with four competing services available in the Slovak Republic and Hungary, five in the Czech Republic and Poland, six in France and eight in Russia.

Following continued growth over the last few years, the total number of satellite operators has declined (see graph 5.1). This is a result of both consolidation, and also the closure of certain services (for example AllesSehen TV in Germany). Major consolidation took place in the Romanian market in 2011 as the important Pay-TV operator Romtelecom, took over two of the other packages (Akta and Boom TV) hence reducing the number of operators from five to three. The same may happen in the Czech Republic where two platforms (CS Link and Sky Link) were taken over by one company (the M7 Group, see below). In addition the Polish platforms N and Cyfra+ are due to merge in 2012.

Many of the services launched in the past few years are "mini packages" as they tend to be small and often quite low-cost. Others are specific "HD packages" such as HD+ in Germany, HD Austria, and Platforma HD in Russia. The combined total of HD channels offered by satellite packagers in Europe has increased from 726 (end 2010) to 1024 at the end of 2011 (MAVISE database). More than 20 HD channels are available on packages in the Czech Republic, France, Germany, Greece, Italy, the Netherlands, Norway, Poland, Portugal, the Slovak Republic, Spain, Sweden Turkey and the UK. Overall, Sky UK had the highest number with 70 HD channels, followed by two Polish packages N and Cyfra+ each with more than 60, and Sky Italia with 53 HD channels. 3D channels (where the content focuses mainly on major sporting events), are also being tested and launched on a range of platforms including Sky (in the UK, Italy and Germany), Viasat, Canal+ (Spain), Canal Digital (Norway), Meo (Portugal) and NTV (Russia).

There is a growing involvement of telecommunications companies in the provision of satellite packages (approximately 15 were launched in the period from 2008 to 2011) involving IPTV offers being made available over satellite, or the emergence of hybrid services that combines DTT, satellite and IPTV services via one set-top box. The main players are Deutsche Telekom (Czech Republic, Germany, Greece, Croatia Hungary and the Slovak Republic) and France Télécom (Belgium,

# Télévision par satellite

Depuis plusieurs années, le marché de la télévision par satellite est en plein essor, surtout dans les pays où la TNT est lente à émerger : Bulgarie, Irlande, Pologne, Roumanie et Russie. Les nombres d'abonnements au satellite et de services disponibles ont augmenté dans de nombreux pays. Certains marchés sont très compétitifs : quatre bouquets sont disponibles en République slovaque et en Hongrie, cinq en République tchèque et Pologne, six en France et huit en Russie.

Après une croissance continue ces dernières années, le nombre total d'opérateurs du satellite a diminué (voir graphique G.5.1), en conséquence de la consolidation du marché et de la fermeture de certains services (par exemple AllesSehen TV en Allemagne). Une consolidation majeure a eu lieu sur le marché roumain en 2011 : l'opérateur Romtelecom, important sur le marché de la télévision payante, a repris deux bouquets (Akta et Boom TV), le nombre d'opérateurs est ainsi passé de cinq à trois. Un phénomène similaire s'est produit en République tchèque où deux plates-formes (CS Link et Sky Link) ont été reprises par une même société (le groupe M7, voir ci-dessous). De plus, les plates-formes polonaises N et Cyfra+ doivent fusionner en 2012.

De nombreux services lancés ces dernières années sont des « mini-bouquets » : ils sont petits et souvent bon marché. D'autres sont spécifiquement des « bouquets HD », comme HD+ en Allemagne, HD Austria et Platforma HD en Russie. Le total cumulé des chaînes HD proposées par les ensembliers satellitaires en Europe est passé de 726 (fin 2010) à 1024 fin 2011 (base de données MAVISE). Plus de 20 chaînes HD sont intégrées à des bouquets en République tchèque, France, Allemagne, Grèce, Italie, Pays-Bas, Norvège, Pologne, Portugal, République slovaque, Espagne, Suède, Turquie et Royaume-Uni. C'est Sky UK qui compte le plus grand nombre de chaînes HD (70), suivi par deux bouquets polonais N et Cyfra+ (plus de 60) et Sky Italia (53). Des chaînes 3D (avec un contenu ciblant principalement les événements sportifs majeurs) sont également testées et lancées sur plusieurs plates-formes, dont Sky (Royaume-Uni, Italie et Allemagne), Viasat, Canal+ (Espagne), Canal Digital (Norvège), Meo (Portugal) et NTV (Russie).

Les entreprises de télécommunications sont de plus en plus impliquées dans la fourniture de bouquets satellite (15 environ ont été lancés entre 2008 et 2011), avec des offres IPTV proposées via satellite ou l'émergence de services hybrides qui associent TNT, satellite et IPTV via un décodeur. Les principaux acteurs sont : Deutsche Telekom (République tchèque, Allemagne, Grèce, Croatie Hongrie et République slovaque) et France Télécom

# *Satellitenfernsehen*

Der Satelliten-TV-Markt hat über Jahre einen Boom erlebt, insbesondere in Ländern mit einem verspäteten Angebot an DVB-T-Diensten: Bulgarien, Irland, Polen, Rumänien und Russland. Viele Länder verzeichnen einen Anstieg der Satelliten-TV-Abonnentenzahlen wie auch der verfügbaren Dienste. In manchen ist der Markt sehr wettbewerbsintensiv, so in der Slowakei und Ungarn (jeweils vier Dienste), in der Tschechischen Republik und Polen (5), in Frankreich (6) und in Russland (8).

Nach dem kontinuierlichen Wachstum der vergangenen Jahre ist die Gesamtzahl der Satelliten-TV-Betreiber zurückgegangen (siehe Grafik G 5.1). Dies ist das Ergebnis einer Konsolidierung, aber auch der Einstellung verschiedener Dienste (z.B. AllesSehen TV in Deutschland). Eine deutliche Konsolidierung des Marktes hat 2011 in Rumänien stattgefunden, wo ein führender Pay-TV-Betreiber (Romtelecom) zwei der übrigen Pakete (Akta und Boom TV) übernommen und die Zahl der Betreiber von fünf auf drei gedrückt hat. Gleiches könnte in der Tschechischen Republik passieren, wo zwei Plattformen (CS Link und Sky Link) von einem Unternehmen übernommen wurden (M7 Group, siehe weiter unten). In Polen wird zudem erwartet, dass die Plattformen N und Cyfra+ 2012 fusionieren.

Viele der in den letzten Jahren gestarteten Dienste sind in der Regel preisgünstige „Mini-Pakete" mit einem begrenzten Umfang. Andere sind reine „HD-Pakete", so z.B. HD+ in Deutschland, HD Austria oder Platforma HD in Russland. Die Gesamtzahl der in Europa von Satelliten-TV-Betreibern angebotenen HD-Kanäle ist von 726 (Ende 2010) auf 1024 (Ende 2011, Datenbank MAVISE) gestiegen. Angebote von 20 und mehr HD-Kanälen gibt es in der Tschechischen Republik, Frankreich, Deutschland, Griechenland, Italien, den Niederlanden, Norwegen, Polen, Portugal, der Slowakei, Spanien, Schweden, der Türkei und Großbritannien. Das umfangreichste HD-Angebot hatte mit 70 HD-Kanälen Sky UK, gefolgt von zwei polnischen Paketen (N und Cyfra+) mit jeweils über 60 und Sky Italia mit 53 HD-Kanälen. Auf verschiedenen Plattformen – darunter Sky (in Großbritannien, Italien und Deutschland), Viasat, Canal+ (Spanien), Canal Digital (Norwegen), Meo (Portugal) und NTV (Russland) – werden auch 3D-Kanäle (vor allem für Sportübertragungen) erprobt bzw. bereits gestartet.

Es gibt eine zunehmende Anzahl von Telekommunikationsunternehmen, die SatellitenTVPakete anbieten (ca. 15 wurden zwischen 2008 und 2011 gestartet). Diese schließen sowohl IPTVAngebote, die über Satellit bereitgestellt werden, wie auch die Entstehung von Hybridangebote

France and Poland), and in 2011 further services were launched by SFR (France), Hellenic Telecommunications (Greece), and Abertis (Spain).

Many companies operate as pan-European players (table 5.10). In the Nordic states, Viasat AS (Modern Times Group) provides services in Denmark, Finland, Norway and Sweden, and also in the Baltic States. Canal Digital (Telenor) also provides services for the Nordic states. News Corporation has become a significant player with satellite packages in three of the largest European states. With Sky (Ireland and the UK), Sky Italia and Sky Deutschland (and Sky Österreich) the company has almost half of all the satellite pay TV subscribers in the European Union (approximately 18m subscribers from the EU total of almost 38m, see tables T5.10 and T5.12).

The M7 Group is active in Austria, Belgium, the Czech Republic, Luxembourg, the Netherlands and the Slovak Republic (having launched services in Austria and Luxembourg in 2010, and taken over two packages that serve the Czech and Slovak markets in 2011). A couple of significant players are competing in the markets of central and south-eastern Europe. The Romanian company RCS&RDS (DigiTV) provides services in Croatia, the Czech and Slovak Republics, Hungary and Romania to more than 3 million households. The US Company Liberty Global (UPC Direct, FocusSat and freeSAT) provides services to about 600 000 homes in the Czech and Slovak Republics, Hungary and Romania. The Total TV package (Mid Europa Partners) is available in Bulgaria (branded as Satellite BG), Croatia (sold in 2011 to the Austrian Group Bewag), the "Former Yugoslav Republic of Macedonia", Slovenia, Serbia, Bosnia and Herzegovina, and Montenegro.

Finally, in 2011 the European Court of Justice made a decision in the *Karen Murphy v. Media Protection Services* case that could have interesting implications for the satellite Pay-TV industry. The court found that: prohibiting the import, sale or use of foreign decoder cards conflicted with the freedom to provide services; and the way in which the broadcasting rights are sold on a territory-by-territory basis contravened EU laws on free trade.

(Belgique, France et Pologne) ; en 2011 d'autres services ont été lancés par SFR (France), Hellenic Telecommunications (Grèce) et Abertis (Espagne).

De nombreuses entreprises opèrent à l'échelle paneuropéenne (tableau 5.10). Dans les pays nordiques, Viasat AS (groupe Modern Times) propose des services au Danemark, en Finlande, en Norvège, en Suède et dans les pays baltes. Canal Digital (Telenor) présente également des offres dans les pays nordiques. News Corporation est devenu un acteur majeur depuis qu'il offre des bouquets satellite dans trois des principaux États européens. Avec Sky (Irlande et Royaume-Uni), Sky Italia et Sky Deutschland (et Sky Österreich) la société compte presque la moitié des abonnés à la télévision payante par satellite de l'Union européenne (environ 18 millions d'abonnés sur un total de presque 38 millions pour l'UE, voir tableaux T5.10 et T5.12).

Le groupe M7 est actif en Autriche, en Belgique, en République tchèque, au Luxembourg, aux Pays-Bas et en République slovaque (lancement de services en Autriche et au Luxembourg en 2010, et reprise de deux bouquets couvrant les marchés tchèque et slovaque en 2011). Deux acteurs importants s'opposent également sur les marchés d'Europe centrale et du sud-est. La société roumaine RCS&RDS (DigiTV) propose ses services en Croatie, Républiques tchèque et slovaque, Hongrie et Roumanie à plus de 3 millions de ménages. La société américaine Liberty Global (UPC Direct, FocusSat et freeSAT) compte environ 600 000 foyers dans les Républiques tchèque et slovaque, en Hongrie et en Roumanie. Le bouquet Total TV (Mid Europa Partners) est disponible en Bulgarie (sous la marque Satellite BG), en Croatie (vendu en 2011 au groupe autrichien Bewag), dans l' « Ex-République yougoslave de Macédoine », en Slovénie, en Serbie, en Bosnie-Herzégovine et au Montenegro.

Enfin, en 2011, la Cour de justice de l'Union européenne a rendu un arrêt dans l'affaire *Karen Murphy c. Media Protection Services* qui pourrait avoir des implications importantes pour l'industrie de la télévision payante par satellite. La Cour a considéré que l'interdiction de l'importation, de la vente ou de l'utilisation de cartes de décodeur étrangères s'opposait à la libre prestation de services et que la manière dont les droits de diffusion étaient vendus sur une base territoriale enfreignait les lois de l'Union européenne sur le libre-échange.

ein, mit denen über einen einzigen Receiver DVBT, Satellitenfernsehen und IPTV empfangen werden kann. Hauptakteure sind die Deutsche Telekom (Tschechische Republik, Deutschland, Griechenland, Kroatien, Ungarn und Slowakei) und France Télécom (Belgien, Frankreich und Polen). Weitere Dienste wurden 2011 von SFR (Frankreich), Hellenic Telecommunications (Griechenland) und Albertis (Spanien) gestartet.

Viele Unternehmen sind auf paneuropäischer Ebene tätig (Tabelle 5.10). So bietet Viasat AS (Modern Times Group) Dienste in Dänemark, Finnland, Norwegen und Schweden sowie in den baltischen Staaten an. Ein weiterer Anbieter in den nordischen Staaten ist Canal Digital (Telenor). Die News Corporation ist in drei der vier größten europäischen Märkte zu einem der wichtigsten Anbieter von Satellitenfernsehpaketen avanciert. Mit Sky (Irland und Großbritannien), Sky Italia und Sky Deutschland (plus Sky Österreich) geht fast die Hälfte der SatellitenTVAbonnenten in der EU auf das Konto der News Corporation (EU-weit ca. 18 der insgesamt knapp 38 Mio. Abonnenten, siehe Tabelle T5.10 und T5.12).

Die M7 Group ist in Österreich, Belgien, der Tschechischen Republik, Luxemburg, den Niederlanden und der Slowakei präsent (und hat 2010 neue Dienste in Österreich und Luxemburg gestartet sowie 2011 zwei Pakete übernommen, die den tschechischen und slowakischen Markt bedienen). Es gibt auch einige große Akteure auf den Märkten Mittel und Südosteuropas. So werden die Dienste des rumänischen Unternehmens RCS&RDS (DigiTV) von über drei Millionen Haushalten in Kroatien, Rumänien, der Slowakei, der Tschechischen Republik und Ungarn genutzt. Die US-amerikanische Liberty Global (UPC Direct, FocusSat und free-SAT) versorgt rund 600 000 Haushalte in der Tschechischen Republik, der Slowakei, Ungarn und Rumänien mit ihren Diensten. Das Paket Total TV (Mid Europa Partners) ist in Bulgarien (unter dem Namen Satellite BG), Kroatien (2011 an die österreichische Bewag Gruppe verkauft), der „ehemaligen jugoslawischen Republik Mazedonien", Slowenien, Serbien, Bosnien-Herzegowina sowie in Montenegro verfügbar.

Vom EuGH wurde 2011 im Fall *Karen Murphy vs. Media Protection Services* ein Urteil gefällt, das große Auswirkungen auf die Satelliten-Pay-TV-Branche haben könnte. So wird im Urteil festgestellt, dass sowohl ein Verbot der Einfuhr, des Verkauf und der Verwendung ausländischer Decoderkarten als auch die territoriale Exklusivität der Fernsehrechte gegen die Dienstleistungsfreiheit und das europäische Freihandelsrecht verstoßen.

Source: European Audiovisual Observatory

T.5.9
G.5.4

# Total DTH satellite households (free and pay) in Europe

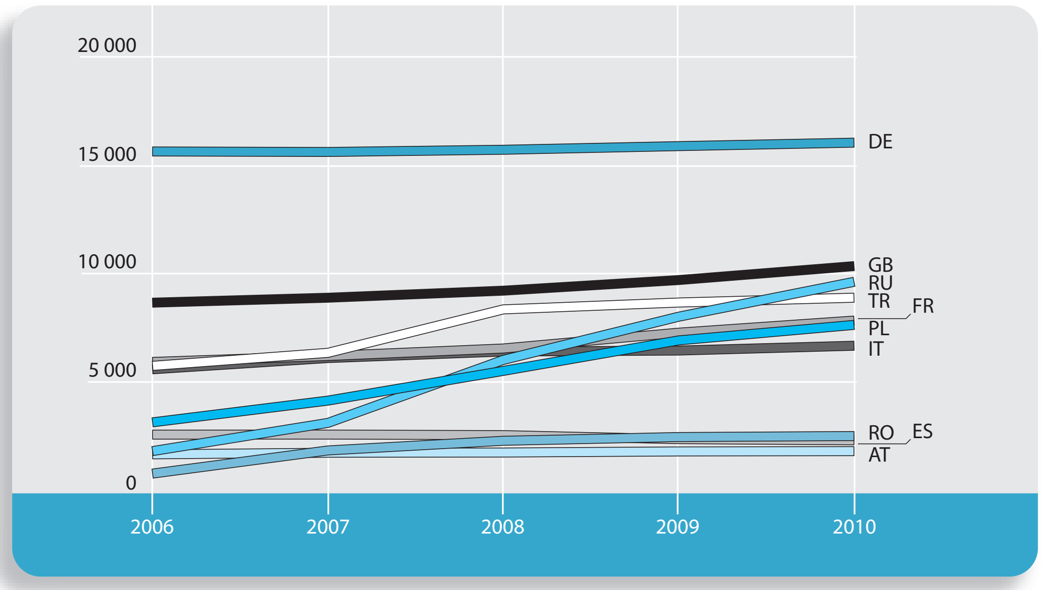
## 2006-2010 In thousand. Primary homes only.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| AT | 1 726 | 1 800 | 1 810 | 1 860 | 1 872 | 0.6% |
| BE | 322 | 318 | 304 | 325 | 329 | 1.2% |
| BG | 503 | 554 | 612 | 627 | 712 | 13.6% |
| CH | 288 | 288 | 294 | 294 | 278 | -5.5% |
| CY | 30 | 31 | 22 | 22 | 19 | -10.6% |
| CZ | 518 | 710 | 1 055 | 1 365 | 1 782 | 30.5% |
| DE | 15 671 | 15 649 | 15 750 | 15 917 | 16 077 | 1.0% |
| DK | 467 | 469 | 429 | 389 | 349 | -10.1% |
| EE | 60 | 79 | 89 | 87 | 88 | 0.8% |
| ES | 2 634 | 2 637 | 2 611 | 2 425 | 2 371 | -2.2% |
| FI | 230 | 200 | 180 | 175 | 186 | 6.3% |
| FR | 5 982 | 6 256 | 6 600 | 7 328 | 7 885 | 7.6% |
| GB | 8 709 | 8 937 | 9 262 | 9 750 | 10 392 | 6.6% |
| GR | 437 | 458 | 475 | 488 | 534 | 9.4% |
| HR | 514 | 518 | 503 | 498 | 479 | -3.9% |
| HU | 630 | 731 | 739 | 847 | 950 | 12.2% |
| IE | 515 | 590 | 625 | 648 | 674 | 4.0% |
| IT | 5 642 | 6 159 | 6 460 | 6 505 | 6 726 | 3.4% |
| LT | 100 | 110 | 123 | 115 | 121 | 5.6% |
| LU | 34 | 38 | 38 | 38 | 38 | 0.0% |
| LV | 90 | 100 | 108 | 100 | 102 | 1.5% |
| MK | 3 | 3 | 3 | 4 | 8 | 107.6% |
| MT | 6 | 5 | 5 | 4 | 4 | 0.0% |
| NL | 677 | 766 | 692 | 684 | 689 | 0.7% |
| NO | 790 | 810 | 802 | 780 | 748 | -4.1% |
| PL | 3 200 | 4 200 | 5 568 | 6 972 | 7 685 | 10.2% |
| PT | 570 | 600 | 692 | 746 | 769 | 3.1% |
| RO | 840 | 1 905 | 2 350 | 2 523 | 2 568 | 1.8% |
| RU | 1 876 | 3 174 | 6 074 | 8 063 | 9 668 | 19.9% |
| SE | 947 | 889 | 842 | 832 | 804 | -3.4% |
| SI | 100 | 100 | 93 | 83 | 79 | -4.8% |
| SK | 425 | 564 | 654 | 740 | 886 | 19.7% |
| TR | 5 800 | 6 400 | 8 400 | 8 716 | 8 938 | 2.5% |
| *EUR 27* | *51 064* | *54 853* | *58 186* | *61 594* | *64 691* | *5.0%* |
| *EUR 37* | *60 334* | *66 046* | *74 262* | *79 949* | *84 810* | *6.1%* |

No data for Albania, Bosnia and Herzegovina, Iceland and Liechtenstein.

Source: Screen Digest

In thousand.



T.5.10

# Satellite TV packagers in Europe
## December 2011

| Country of establ. | Company | Group | Name of the service | Date of launch | Number of TV channels | Number of HD channels | Countries of reception | Number of DTH subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|
| AL | **Albanian Satellite Communications** | | Tring Digital | 2008 | 34 | 0 | AL | ~ |
| | **DigitAlb** | Top Media Group | DigitAlb | 2004 | 70 | 14 | AL | 300 (12.2010) |
| AT | **AustriaSat** | M7 Group | Austria Sat | 2010 | 16 [1] | 0 | AT | 7 (*est.* 12.2010) |
| | | | HD Austria | 2011 | 14 | 14 | AT | ~ |
| | **ORF** | ORF | ORF Digital | 1997 | 22 | 2 | AT | 1 800 (12 2010) |
| BA | **Total TV BH d.o.o.** | Mid-Europa Partners | Total TV (BA offer) | 2008 | 73 | 3 | BA | 34 (*est.* 12.2010) |
| BE | **Mobistar SA** | France Télécom | Starpack | 2010 | 69 [1] | 3 | BE | 10 (12.2010) |
| BG | **Bulsatcom AD** | | Bulsatcom | 2003 | 106 | 9 | BG | 300 (*est.* 12.2010) |
| | **Satellite BG AD** | Mid-Europa Partners | Satellite BG (formerly Total TV) [2] | 2011 | 66 [1] | 24 | BG | 50 (12. 2010) |
| | **Vivacom** | Vivacom | Vivacom TV | 2010 | 80 | 2 | BG | 70 (07.2011) |
| CH | **SRG SSR idée suisse** | SRG SSR idée suisse | Sat-Access | 1997 | 15 | 8 | CH | 605 (12.2009) |
| CZ | **Digi Czech Republic s.r.o.** | RCS&RDS (RO) | Digi TV (Czech) | 2004 | 54 | 0 | CZ | 300 (*est.* 08.2010) |
| | **Media Vision s.r.o.** | M7 Group | CS Link | 2006 | 57 | 4 | CZ, SK | 675 (10.2011 in CZ and SK) |
| | **T-Mobile Czech Republic** | Deutsche Telekom AG | T-Mobile TV | 2010 | 68 | 15 | CZ | ~ |
| | **Trade Tec a.s.** | M7 Group | Skylink | 2007 | 81 | 20 | CZ, SK | 950 (08.2011) in CZ |
| | **UPC Ceska Republika a.s.** | Liberty Global | freeSAT (UPC) [8] | 2000 | 92 | 10 | CZ | 79 (09.2011) |
| DE | **Deutsche Telekom AG** | Deutsche Telekom AG | Entertain Sat | 2011 | 270 [1] | 4 | DE | 50 000 (12.2011) |
| | **HD Plus GmbH** | SES Astra SA | HD+ | 2010 | 12 | 12 | DE | 305 (11.2011) |
| | **Sky Deutschland GmbH** | News Corporation | Sky Deutschland/ Sky Österreich | 1990 | 106 | 31 | AT, DE | 2 800 (12.2011 in AT and DE) |
| DK | **Canal Digital Denmark A/S** | Telenor | Canal Digital | 1997 | 98 | 19 | DK | 141 DTH + 657 SMATV (03.2010) |
| | **ViaSat A/S Danmark** | MTG (Modern Times Group) | Viasat | 1991 | 53 | 7 | DK | 181 (*est.* 12.2010) |
| EE | **Viasat AS Estonia** | MTG (Modern Times Group) | Viasat | 2004 | 69 | 3 | EE | 49 (*est.* 12.2010) |
| | | | Viasat | 2004 | 63 | 3 | LT | 79 (12.2010) |
| | | | Viasat | 2004 | 73 | 3 | LV | 69 (*est.* 12.2010) |
| ES | **DTS Distribuidora de Television Digital S.A.** | Prisa/ Telefonica/ Mediaset | Canal + (ex. Digital +) | 1994 | 152 | 27 | ES | 1 774 (09.2011) |
| | **Hispasat SA** | Abertis | Starmax HD | 2011 | 37 | 7 | ES | ~ |
| FI | **Canal Digital Finland Oy** | Telenor | Canal Digital | 1997 | 85 | 13 | FI | 55 DTH + 43 SMATV (03.2010) |
| | **Oy Viasat Finland AB** | MTG (Modern Times Group) | Viasat | 1991 | 33 | 4 | FI | 56 (*est.* 12.2010) |
| FR | **ABSAT** | Groupe AB / TF1 | Bis TV | 2007 | 50 | 3 | FR | 150 (*est.* 09.2010) |
| | **Canal+ Distribution** [3] | Vivendi | Canalsat | 1992 | 268 | 30 | FR | 4 850 (12.2010) |
| | | | Canalsat Suisse | 2008 | 103 | 12 | CH | 12 (*est.* 12.2009) |
| | | | TNT sat | 2007 | 36 | 4 | FR | 3 300 (12.2011) |
| | **France Télécom** | France Télécom | La TV d'Orange | 2008 | 150 | 11 | FR | 3 896 (IPTV & Sat. 06.2011) |
| | **Fransat S.A.S.** | Eutelsat | Fransat | 2009 | 56 | 4 | FR | 800 (12.2010) |
| | **SFR** | Vivendi / Vodafone | Neufbox TV Sat | 2011 | 62 | 9 | FR | ~ |
| GB | **British Sky Broadcasting** | News Corporation | Sky | 1989 | 667 [4] | 70 | GB, IE | 10 213 (09.2011 in GB and IE) |
| | **Freesat (UK) Ltd** | BBC/ITV Plc joint venture | Freesat | 2008 | 162 [4] | 5 | GB | 2 000 (09. 2011) |

T.5.10

## Satellite TV packagers in Europe (Continued)
## December 2011

| Country of establ. | Company | Group | Name of the service | Date of launch | Number of TV channels | Number of HD channels | Countries of reception | Number of DTH subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|
| **GR** | **Multichoice Hellas** | Forthnet group | Nova | 1999 | 108 | 20 | CY, GR | 373 (09.2011) |
| | **Hellenic Telecommunications Organization S.A.** | Deutsche Telekom | OTE TV | 2011 | 48 | 8 | GR | ~ |
| **HR** | **B.Net** | BEWAG Group | Total TV/ B.NET [5] | 2008 | 89 [1] | 3 | HR | 6 (*est.* 12.2010) |
| | **Digi Satelitska Televizija d.o.o.** | RCS&RDS (RO) | Digi TV (HR) | 2009 | 46 | 0 | HR | 70 (*est.* 12.2010) |
| | **T-HT D.D.** | Deutsche Telekom AG | MAXtv Sat | 2010 | 62 | 1 | HR | ~ |
| **HU** | **Digi Tavkozlesi Kft** | RCS&RDS (RO) | Digi TV (HU) | 2004 | 68 | 0 | HU | 404 (*est.* 08.2011) |
| | **HD Platform Kft** | British Watchcable Ltd | Hello HD | 2008 | 44 [1] | 9 | HU | 3 (*est.* 08.2010) |
| | **Magyar Telekom** | Deutsche Telekom | T-Home | 2009 | 101 | 4 | HU | 263 (*est.* 08.2011) |
| | **UPC Magyarorzag** | Liberty Global | UPC Direct | 2000 | 90 | 8 | HU | 207 (09.2011) |
| **IT** | **Sky Italia** | News Corporation | Sky Italia | 2003 | 387 | 53 | IT | 5 000 (09.2011) |
| | **TIVU SRL** | Rai, Mediaset, Telecom Italia | Tivusat | 2009 | 60 | 1 | IT | 751 (12.2010) |
| **LU** | **M7 Group S.A.** | M7 Group | TéléSat Numérique | 2008 | 89 [1] | 3 | BE (CFB) | 125 (TV Vlaanderen +Télésat 12.2010) |
| | | | TéléSat Luxembourg | 2010 | 58 [1] | 0 | LU | ~ |
| | | | TV Vlaanderen | 2006 | 197 | 8 | BE (VLG) | 125 (TV Vlaanderen +Télésat 12.2010) |
| | | | Canal Digitaal | 1996 | 254 | 46 | NL | 798 (12.2010) |
| **MK** | **Total TV Ltd** | Mid-Europa Partners | Total TV (MK) | 2009 | 85 [1] | 3 | MK | 5 (*est.* 12.2010) |
| **NO** | **Canal Digital Norge AS** | Telenor | Canal Digital | 1997 | 92 | 22 | NO | 334 DTH + 267 SMATV (03.2010) |
| | **Viasat AS Norge** | MTG (Modern Times Group) | Viasat | 1991 | 56 | 7 | NO | 143 (*est.*12.2010) |
| **PL** | **Canal+ Cyfrowy SP Z.O.O.** | Vivendi [6] | Cyfra + | 1998 | 183 | 64 | PL | 1 550 (12.2010) |
| | **ITI Neovisio SP Z.O.O.** | ITI Holdings [6] | N | 2006 | 328 | 60 | PL | 860 (12.2011) |
| | | | TNK (Telewizja na karte) | 2009 | 80 | 25 | PL | 279 (09.2010) |
| | **Polsat Cyfrowy SP Z.O.O.** | Polsat | Cyfrowy Polsat | 1999 | 155 | 48 | PL | 3 434 (12.2010) |
| | **Telekomunikacja Polska S.A.** | France Telecom | Orange Polska | 2008 | 140 | 42 | PL | 428 (12.2010) |
| | **Telewizja Polska S.A.** | | TVP | 2009 | 10 | 1 | PL | ~ |
| **PT** | **Portugal Telecom** | Portugal Telecom | Meo | 2008 | 101 | 9 | PT | 280 (*est.* 09.2011) |
| | **Zon TV Cabo** | Zon Multimedia | Zon TV Cabo | 1994 | 99 | 20 | PT | 395 (09.2011) |
| **RO** | **Digital Cable System** | ROMTELECOM SA | Akta Satellite [7] | 2005 | 17 | 0 | RO | 70 (*est.* 03.2011) |
| | **ROMTELECOM SA** | ROMTELECOM SA | Boom TV [7] | 2006 | 61 | 0 | RO | 90 (*est.* 03.2011) |
| | **Focus Sat Romania** | Liberty Global | Focus Sat [8] | 2004 | 106 | 4 | RO | 225 (09.2011) |
| | **RCS&RDS** | RCS&RDS | Digi TV (RO) | 2004 | 89 | 0 | RO | 1 000 (*est.* 09.2011) |
| | **ROMTELECOM SA** | ROMTELECOM SA | Dolce | 2006 | 105 | 8 | RO | 1 040 (*est.* 03.2011) |

T.5.10

## Satellite TV packagers in Europe (Continued)
## December 2011

| Country of establ. | Company | Group | Name of the service | Date of launch | Number of TV channels | Number of HD channels | Countries of reception | Number of DTH subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|
| RU | **HD Platforma** | | Platforma HD | 2008 | 13 | 12 | RU | ~ |
| | **NTV Plyus** | Gazprom Media | NTV+ | 1998 | 174 | 12 | RU | 630 (12.2010) |
| | **Orion Ekspress** | Rostelecom | Continent | 2010 | 118 | 1 | RU | ~ |
| | | | Telekarta | 2010 | 18 | 0 | RU | ~ |
| | **Raduga TV** | Raduga Holdings / MTG (Modern Times Group) | Raduga TV | 2009 | 84 | 0 | RU | 70 (12.2009) |
| | **Rikor TV** | Rikor Holding | Rikor TV Active TV | 2009 | 60 | 2 | RU | ~ |
| | **Tricolor TV** | Gazprom Media | Tricolor TV | 2007 | 133 | 0 | RU | 9 000 (11.2011) |
| | **ZAO Kosmos-TV** | AFK Sistema | Kosmos TV | 2010 | 70 | | RU | ~ |
| SE | **Canal Digital Sverige AB** | Telenor | Canal digital | 1997 | 92 | 17 | SE | 523 DTH + 91 SMATV (03.2010) |
| | **Viasat Satellite Service AB** | MTG (Modern Times Group) | Viasat | 1991 | 70 | 10 | SE | 315 (*est.* 12.2010) |
| SI | **Total TV d.o.o.** | Mid-Europa Partners | Total TV (Slovenia) | 2007 | 81 [1] | 3 | SI | 30 (*est.* 08.2011) |
| SK | **Digi Slowakia** | RCS&RDS (RO) | Digi TV | 2004 | 66 | 1 | SK | 320 (12.2010) |
| | **T-Com AS** | Deutsche Telekom | Magio Sat | 2010 | 54 | 3 | SK | 45 (10.2011) |
| | **Towercom A.S.** | M7 Group | Skylink | 2009 | 81 | 20 | SK, CZ | 550 (08.2011) in SK |
| | **UPC Broadband Slovakia** | Liberty Global | freeSAT (UPC) [8] | 2000 | 92 | 10 | SK | 44 (09.2011) |
| TR | **Digitürk** | Çukurova Holding and Providence Equity | Digitürk | 2000 | 156 | 24 | TR | 2 300 (12.2010) |
| | **D Smart** | DOĞAN GROUP | D Smart | 2007 | 220 | 23 | TR | 1 234 (12.2010) |

1. Hundreds of free to air satellite channels also available.
2. Satellite BG was formerly Total TV (rebranded in 2010 by Mid Europa Partners) and formerly ITV Partner (launched 2004).
3. Canal+ France, through its subsidiary Canal+ Overseas, also distributes 3 satellite packages targeting overseas territories (CanalSat Réunion, Maurice, Caraibes) and several other packages targeting Africa, the Indian Ocean or Asia (CanalSat Horizons, Madagascar, Calédonie, K+ and Le bouquet de Canal+).
4. Sky UK includes full offers for both UK and Ireland. Sky and Freesat line-ups both include approx. 40 windows.
5. Major shares in Total TV Package sold by Mid Europa Partners to B.NET (BEWAG Group) at end of 2010.
6. ITI Holdings and Vivendi announced in December 2011 an agreement involving the merger of their satellite packages.
7. Both AKTA Satellite and BOOM TV were taken over by Romtelecom in 2011. Customers encouraged to move to Dolce packages from 2012.
8. Formerly known as UPC Direct, and rebranded end 2011 for Czech Republic and Slovak Republic, and as Focus Sat in Romania.

Source: European Audiovisual Observatory, MAVISE database, company websites and reports, regulator reports

T.5.11

## Reception in Europe of the two main satellite systems
### SES ASTRA data 2011 / EUTELSAT data 2010 Thousands of HH.

| Country | EUTELSAT 13° East (Hot Bird) & 28.1° East (Eurobird 1) Reception by: DTH+SMATV | Cable | Total ❶ | SES ASTRA 19.2° East & 28.2° East Reception by: DTH+SMATV | Cable | Total ❶ |
|---|---|---|---|---|---|---|
| AL | 165 | 205 | 352 | ~ | ~ | ~ |
| AT | 730 | 1 253 | 1 912 | 1 880 | 1 380 | 3 260 |
| BA | 170 | 219 | 386 | 210 | 340 | 550 |
| BE | 336 | 3 593 | 3 929 | 440 | 3 250 | 3 690 |
| BG | 168 | 1 066 | 1 197 | 200 | 1 040 | 1 240 |
| CH | 318 | 2 471 | 2 697 | 460 | 2 140 | 2 600 |
| CY | 35 | 16 | 48 | ~ | ~ | ~ |
| CZ | 155 | 418 | 563 | 470 | 610 | 1 080 |
| DE | 2 016 | 20 085 | 21 395 | 16 420 | 18 150 | 34 570 |
| DK | 200 | 1 134 | 1 334 | 100 | 1 230 | 1 330 |
| EE | 27 | 162 | 186 | 30 | 200 | 230 |
| ES | 769 | 1 388 | 2 157 | 2 080 | 1 660 | 3 740 |
| FI | 282 | 498 | 771 | 10 | 170 | 180 |
| FR | 2 099 | 2 964 | 4 824 | 5 530 | 2 050 | 7 580 |
| GB | 11 169 | 6 203 | 17 297 | 11 220 | 3 420 | 14 640 |
| GR | 656 | 0 | 656 | 170 | 0 | 170 |
| HR | 319 | 174 | 481 | 280 | 240 | 520 |
| HU | 146 | 2 078 | 2 215 | 380 | 2 320 | 2 700 |
| IE | 799 | 744 | 1 543 | 810 | 310 | 1 120 |
| IT | 7 026 | 0 | 7 026 | 2 090 | 0 | 2 090 |
| LT | 75 | 500 | 574 | 40 | 260 | 300 |
| LU | ~ | ~ | ~ | 50 | 110 | 160 |
| LV | 67 | 253 | 318 | 40 | 510 | 550 |
| NL | 260 | 5 576 | 5 705 | 600 | 5 590 | 6 190 |
| NO | 215 | 811 | 1 020 | 80 | 690 | 770 |
| PL | 6 157 | 4 421 | 10 119 | 2 150 | 4 630 | 6 780 |
| PT | 242 | 1 418 | 1 660 | 200 | 990 | 1 190 |
| RO | 298 | 3 460 | 3 758 | 150 | 2 180 | 2 330 |
| RU | 1 365 | 4 019 | 5 384 | ~ | ~ | ~ |
| SE | 315 | 2 331 | 2 572 | 140 | 630 | 770 |
| SI | 84 | 351 | 421 | 40 | 320 | 360 |
| SK | 60 | 415 | 475 | 370 | 530 | 900 |
| TR | 2 739 | 1 245 | 3 979 | ~ | ~ | ~ |
| *EUR 27* | *34 341* | *60 546* | *93 041* | *45 610* | *51 540* | *97 150* |
| *EUR 37* | *39 462* | *69 471* | *106 954* | *46 640* | *54 950* | *101 590* |
| **European States non-members of the European Audiovisual Observatory** | | | | | | |
| BY | 122 | 290 | 393 | 160 | 0 | 160 |
| RS | 97 | 786 | 848 | 150 | 900 | 1 050 |
| UA | 875 | 2 937 | 3 812 | 740 | 2 180 | 2 920 |
| **Non-European States** | | | | | | |
| DZ | 4 354 | 0 | 4 354 | 2 610 | 0 | 2 610 |
| EG | 5 433 | 0 | 5 433 | ~ | ~ | ~ |
| IL | 276 | 819 | 1 091 | ~ | ~ | ~ |
| JO | 340 | 0 | 340 | ~ | ~ | ~ |
| LB | 755 | 2 | 755 | ~ | ~ | ~ |
| MA | 2 758 | 0 | 2 758 | 2 680 | 0 | 2 680 |
| SA | 1 845 | 0 | 1 845 | ~ | ~ | ~ |
| SY | 1 639 | 0 | 1 639 | ~ | ~ | ~ |
| TN | 1 698 | 0 | 1 698 | 1 250 | 0 | 1 250 |

❶ CATV+DTH+SMATV.

Source: EUTELSAT & SES Astra

No data for Iceland, Liechtenstein, 'The former Yugoslav Republic of Macedonia' and Malta.

T.5.12
G.5.5

# Number of satellite pay TV subscribers in Europe 2006-2010

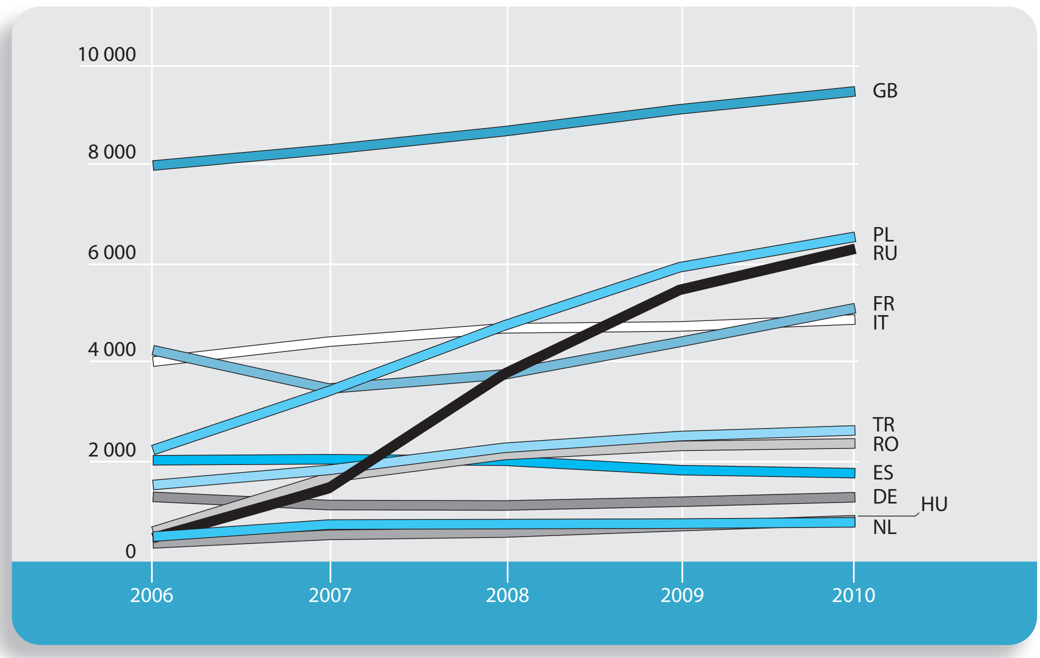
In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| AT | 0 | 0 | 0 | 0 | 7 | – |
| BE | 30 | 55 | 73 | 100 | 115 | 15.0% |
| BG | 215 | 327 | 405 | 445 | 545 | 22.5% |
| CH | 6 | 6 | 10 | 10 | 10 | 2.5% |
| CY | 22 | 23 | 14 | 14 | 12 | -16.9% |
| CZ | 194 | 389 | 494 | 515 | 611 | 18.7% |
| DE | 1 307 | 1 143 | 1 134 | 1 209 | 1 300 | 7.5% |
| DK | 424 | 415 | 386 | 359 | 322 | -10.2% |
| EE | 25 | 40 | 49 | 48 | 49 | 3.2% |
| ES | 2 044 | 2 065 | 2 035 | 1 846 | 1 785 | -3.3% |
| FI | 79 | 76 | 76 | 70 | 83 | 18.5% |
| FR | 4 258 | 3 487 | 3 771 | 4 423 | 5 105 | 15.4% |
| GB | 7 976 | 8 297 | 8 665 | 9 107 | 9 468 | 4.0% |
| GR | 260 | 292 | 307 | 319 | 364 | 14.1% |
| HR (1) | 0 | 0 | 0 | 77 | 114 | 48.1% |
| HU | 371 | 542 | 590 | 718 | 838 | 16.8% |
| IE | 465 | 535 | 573 | 601 | 628 | 4.5% |
| IT | 4 030 | 4 430 | 4 700 | 4 737 | 4 877 | 3.0% |
| LT | 36 | 69 | 84 | 75 | 79 | 5.9% |
| LV | 25 | 58 | 71 | 66 | 69 | 3.8% |
| NL | 508 | 750 | 760 | 770 | 795 | 3.2% |
| NO | 700 | 723 | 716 | 695 | 666 | -4.2% |
| PL | 2 251 | 3 436 | 4 754 | 5 928 | 6 541 | 10.3% |
| PT | 436 | 484 | 586 | 645 | 670 | 3.9% |
| RO | 610 | 1 695 | 2 150 | 2 333 | 2 383 | 2.1% |
| RU (1) | 482 | 1 480 | 3 780 | 5 472 | 6 300 | 15.1% |
| SE | 768 | 720 | 681 | 666 | 639 | -4.0% |
| SI | 0 | 3 | 16 | 21 | 30 | 42.0% |
| SK | 120 | 257 | 322 | 358 | 484 | 35.2% |
| TR | 1 547 | 1 850 | 2 294 | 2 531 | 2 645 | 4.5% |
| *EUR 27* | *26 455* | *29 589* | *32 696* | *35 371* | *37 799* | *6.9%* |
| *EUR 37* | *29 190* | *33 647* | *39 496* | *44 156* | *47 534* | *7.6%* |

(1) Different sources for 2010 data for Russia (J'Son and Partners Consulting) and for Croatia (HAKOM).

Source: Screen Digest

In thousand.



T.5.13
G.5.6

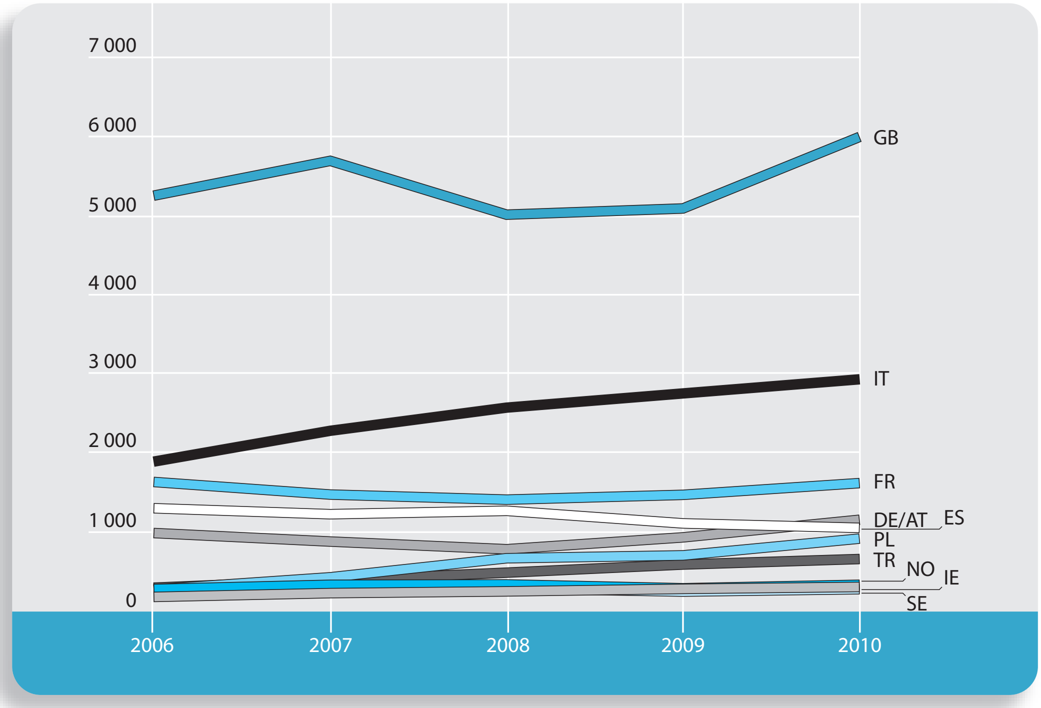
# Consumers expenditures for pay satellite audiovisual services 2006-2010

EUR million. Including transactional services, NVoD and VoD.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **BE** | 1.6 | 4.6 | 7.5 | 12.2 | 16.7 | ***36.5%*** |
| **BG** | 15.2 | 25.2 | 34.9 | 40.6 | 45.7 | ***12.6%*** |
| **CZ** | 43.5 | 66.1 | 93.6 | 99.7 | 111.2 | ***11.5%*** |
| **DE/AT** | 991.1 | 883.5 | 786.3 | 936.5 | 1 158.7 | ***23.7%*** |
| **DK** | 182.4 | 204.4 | 198.7 | 178.4 | 165.0 | ***-7.5%*** |
| **EE** | 4.1 | 6.9 | 9.7 | 10.8 | 11.2 | ***4.2%*** |
| **ES** | 1 304.7 | 1 229.4 | 1 272.3 | 1 113.2 | 1 056.5 | ***-5.1%*** |
| **FI** | 38.3 | 41.8 | 42.1 | 38.5 | 41.2 | ***7.2%*** |
| **FR** | 1 637.0 | 1 477.9 | 1 413.6 | 1 474.3 | 1 622.6 | ***10.1%*** |
| **GB** | 5 258.9 | 5 698.7 | 5 018.0 | 5 096.5 | 6 000.3 | ***17.7%*** |
| **GR** | 165.4 | 186.9 | 191.4 | 199.5 | 226.4 | ***13.5%*** |
| **HU** | 52.5 | 75.6 | 76.1 | 72.1 | 83.1 | ***15.2%*** |
| **IE** | 183.3 | 231.3 | 253.2 | 284.8 | 309.3 | ***8.6%*** |
| **IT** | 1 895.0 | 2 284.6 | 2 577.4 | 2 757.1 | 2 935.4 | ***6.5%*** |
| **LT** | 5.1 | 10.6 | 12.0 | 11.5 | 11.3 | ***-2.3%*** |
| **LV** | 1.9 | 4.7 | 7.7 | 8.4 | 7.7 | ***-8.1%*** |
| **NL** | 49.8 | 75.1 | 93.4 | 97.5 | 103.1 | ***5.8%*** |
| **NO** | 283.0 | 336.6 | 341.0 | 292.7 | 336.9 | ***15.1%*** |
| **PL** | 278.1 | 431.2 | 672.4 | 708.5 | 920.4 | ***29.9%*** |
| **PT** | 136.0 | 161.4 | 178.5 | 189.6 | 200.9 | ***6.0%*** |
| **RO** | 28.0 | 106.8 | 166.3 | 163.8 | 173.1 | ***5.7%*** |
| **SE** | 293.7 | 312.6 | 291.0 | 250.6 | 280.6 | ***12.0%*** |
| **SI** | 0.0 | 0.2 | 2.9 | 6.0 | 8.9 | ***48.1%*** |
| **SK** | 12.6 | 30.8 | 47.0 | 58.7 | 74.7 | ***27.3%*** |
| **TR** | 300.5 | 391.8 | 490.2 | 592.7 | 662.4 | ***11.8%*** |
| ***EUR 27*** | ***12 578.2*** | ***13 550.3*** | ***13 446.0*** | ***13 808.7*** | ***15 564.1*** | ***12.7%*** |
| ***EUR 37*** | ***13 161.6*** | ***14 278.7*** | ***14 277.2*** | ***14 694.1*** | ***16 563.4*** | ***12.7%*** |

Source: Screen Digest

EUR million.



The number of cable television subscribers in the European Union declined slightly for the second year running in 2010 (T.5.14). At the end of the year, cable television was supplied to 60.1 million households in the EU (and more than 75 million in Europe as a whole) compared to 60.8 million the year before. However, cable is still the main means of accessing pay-TV in Europe, far ahead of satellite, IPTV or digital terrestrial television, which are all rapidly expanding but only supply 38, 11 and 8 million EU households respectively.

The extent of cable TV penetration varies considerably from one country to another: while it is present in three-quarters of Belgian and Dutch households and half of German and Swedish homes, it supplies barely 15% of British, French and Spanish households and is completely absent from the television landscapes in Italy and Greece.

Despite the slight rise in the number of subscribers recorded in the United Kingdom or Finland, the European market suffered in 2010 from a lack of dynamism in its traditional markets, such as Germany (-2.1%), the Netherlands (-3.2%) or Belgium (-2.2%). The growth engines are now to be found in countries of eastern and south-eastern Europe, such as Turkey (+4.3% in 2010) or Bulgaria (+1.5%).

Network digitisation represents one of the main challenges for the cable television sector. About 40% of cabled households in the EU (36% in Europe as a whole) were digital at the end of 2010, compared with 35% a year earlier. Cable networks in Finland have been fully digital since 2008, while the same is virtually true in Luxembourg and the United Kingdom. The cable network digitisation rate also exceeded 75% in Spain and Portugal. On the other hand, it is still below 33% in around fifteen European countries, including 11 EU members (Slovenia, Bulgaria, Poland, Germany, Hungary, Latvia, Slovakia, Cyprus, Lithuania, Romania and Estonia). Indeed, only a quarter of the 19 million cable households in Germany, Europe's most important market, are digital.

Access to digital services ensures that subscriber expenditure continues to rise. Despite the decrease in the number of subscribers, EU consumer expenditure rose in 2010 by nearly 6% (T.5.17) and reached EUR 12.1 billion. The three countries with the greatest revenue remain Germany (EUR 2.9 billion), the United Kingdom (EUR 1.5 billion, a rise of 17%) and the Netherlands (EUR 1.3 billion).

There were more than 6800 cable distribution companies operating in Europe at the end of 2011 (G.5.1), with 4 800 of these in the EU. These figures have been

Le nombre d'abonnés à la télévision par câble dans l'Union européenne (UE) a légèrement reculé pour la seconde année consécutive en 2010 (T.5.14). A la fin de l'année la télévision par câble équipe 60,1 millions de foyers dans l'UE (et plus de 75 millions en Europe) contre 60,8 l'année précédente. Le câble demeure toutefois le mode d'accès privilégié à la télévision payante en Europe, loin devant le satellite, l'IPTV ou la télévision numérique terrestre, en plein essor, mais qui n'équipent respectivement que 38, 11 et 8 millions de foyers dans l'UE.

L'importance de la télévision par câble varie largement selon les pays : présente dans les trois quarts des foyers belges et néerlandais ou dans la moitié des foyers allemands et suédois, elle équipe à peine 15 % des foyers britanniques, français et espagnols et est complètement absente des paysages télévisuels italiens et grecs.

Malgré la hausse légère des abonnés enregistrée au Royaume-Uni ou en Finlande, le marché européen souffre en 2010 du manque de dynamisme de ses marchés traditionnels comme l'Allemagne (-2,1 %), les Pays-Bas (-3,2 %) ou la Belgique (-2,2 %). Les relais de croissance se trouvent désormais dans les pays d'Europe de l'est ou du sud-est comme la Turquie (+4,3 % en 2010) ou la Bulgarie (+1,5 %).

La numérisation des réseaux représente l'un des principaux défis pour le secteur de la télévision par câble. Environ 40 % des foyers câblés dans l'UE (36 % en Europe) sont numérisés à la fin de l'année 2010, contre 35 % un an plus tôt. Les réseaux câblés sont entièrement numérisés en Finlande depuis 2008, et le sont presque entièrement aussi au Luxembourg et au Royaume-Uni. Le taux de numérisation des réseaux câblés dépasse aussi les 75 % en Espagne ou au Portugal. En revanche, il se situe toujours sous la barre des 33 % dans une quinzaine de pays européens, dont 11 de l'UE (Slovénie, Bulgarie, Pologne, Allemagne, Hongrie, Lettonie, République slovaque, Chypre, Lituanie, Roumanie et Estonie). De fait, seul un quart des 19 millions de foyers câblés en Allemagne, le marché le plus important d'Europe, sont numériques.

C'est l'accès aux services numériques qui permet de maintenir à la hausse les dépenses des abonnés. Malgré le recul du nombre d'abonnés, les dépenses des consommateurs progressent dans l'UE en 2010 de près de 6 % (T.5.17) pour s'établir à 12,1 milliards EUR. Les trois pays les plus importants en termes de volume d'affaires demeurent l'Allemagne (2,9 milliards), le Royaume-Uni (1,6 milliard, en hausse de 17 %) et les Pays-Bas (1,3 milliard).

On dénombre plus de 6 800 entreprises de câblodistribution actives en Europe à la fin

Die Zahl der Kabelabonnenten war 2010 in der Europäischen Union zum zweiten Mal hintereinander leicht rückläufig (T.5.14). Ende des Jahres hatten 60,1 Mio. Haushalte in der EU einen Kabelfernsehanschluss (in ganz Europa waren es über 75 Mio.) gegenüber 60,8 Mio. im Vorjahr. Das Kabel wird in Europa weiterhin vorrangig als Zugang zum Bezahlfernsehen genutzt, weit vor Satellit, IPTV oder digitalem terrestrischen Fernsehen, Bereiche, die stark boomen, aber in lediglich 38, 11 bzw. 8 Mio. Haushalte in der EU zu finden sind.

Die Bedeutung des Kabelfernsehens unterscheidet sich je nach Land erheblich: In Belgien und den Niederlanden sind drei Viertel der Haushalte verkabelt, in Deutschland und Schweden die Hälfte, im Vereinigten Königreich, in Frankreich und Spanien gerade mal 15 % und in Italien und Griechenland gibt es gar kein Kabelfernsehen.

Trotz einer leichten Zunahme bei den Abonnentenzahlen im Vereinigten Königreich und in Finnland litt der europäische Markt 2010 unter der mangelnden Dynamik in den traditionellen Märkten wie Deutschland (-2,1 %), Niederlande (-3,2 %) und Belgien (-2,2 %). Die Wachstumsmotoren befinden sich nun in ost- und südosteuropäischen Ländern wie der Türkei (+4,3 % 2010) oder Bulgarien (+1,5 %).

Zu den größten Herausforderungen für den Kabelfernsehsektor zählt die Digitalisierung der Netze. Etwa 40 % der Kabelhaushalte in der EU (36 % in ganz Europa) waren Ende 2010 digitalisiert, im Vorjahr waren es 35 %. Seit 2008 sind die Kabelnetze in Finnland vollständig digitalisiert und in Luxemburg und dem Vereinigten Königreich ist die Digitalisierung ebenfalls nahezu vollständig abgeschlossen. Auch in Spanien und Portugal liegt der Prozentsatz bei über 75 %. Dagegen kommen etwa 15 europäische Länder weiterhin nicht über die 33 %-Marke, darunter 11 in der EU (Bulgarien, Deutschland, Estland, Lettland, Litauen, Polen, Rumänien, Slowakische Republik, Slowenien, Ungarn und Zypern). Tatsächlich sind in Deutschland, dem wichtigsten europäischen Markt, gerade mal ein Viertel der 19 Mio. Kabelhaushalte digitalisiert.

Das Wachstum bei den Ausgaben der Abonnenten hält an, was den digitalen Diensten zu verdanken ist. Obwohl es weniger Abonnenten gab, stiegen 2010 in der EU die Verbraucherausgaben um fast 6 % (T.5.17) auf 12,1 Mrd. EUR. Die drei Länder mit dem größten Umsatzvolumen sind nach wie vor Deutschland (2,9 Mrd.), das Vereinigte Königreich (1,6 Mrd., ein Anstieg um 17 %) und die Niederlande (1,3 Mrd.).

Ende 2011 gab es in Europa über 6 800 aktive Kabelverbreitungsunternehmen steadily declining for several years as the sector has consolidated. There are more than 400 cable operators competing in eight European countries (Denmark, Norway, Bulgaria, Russian Federation, Romania, Spain, Poland and Hungary). On the other hand, nine other markets are supplied by less than ten operators, such as the United Kingdom, which has only three and where the market is virtually controlled by Virgin Media, or Belgium, with six companies and only four packages distributed (Voo, Numericable, Telenet and AIESH).

The large number of cable companies operating in a country may conceal the extreme concentration of that particular market (T.5.16). For example, there are around thirty companies listed in France but Numericable (which, incidentally, sold off its assets in Belgium and Luxembourg in 2011) controls 99% of the national network. Similarly, there are 500 companies operating in Spain but ONO controls nearly two-thirds of the market (the figure increases to more than 80% if the market shares of Euskaltel and Telecable de Asturias are added).

The situation is similar in Sweden and Denmark with Com Hem and YouSee (TDC) respectively. Several important events took place in the Nordic markets in 2011 including the takeover of Stofa in Denmark from TeliaSonera, the purchase by Ratos from Telenor of the Canal Digital cable operations, and the completion in Finland of an agreement between DNA and Sanoma to merge the DNA and Welho packages. In addition there was the (unsucessful) attempt by Com Hem in Sweden to take control of the cable business of Telenor's Canal Digital.

In Germany, where there are still around a hundred cable companies, the sector is structured around four main operators: Kabel Deutschland, Unity Media (Liberty Global), Kabel BW and Telecolombus. In December 2011, Germany's competition authority gave the go-ahead for the takeover of Kabel BW by the American group Liberty Global, which has a cable television presence in around a dozen European countries (Germany, Austria, Belgium, Hungary, Ireland, Netherlands, Poland, Slovakia, Czech Republic, Romania, Switzerland, etc), and is, with Virgin Media, one of Europe's biggest cable operators in terms of revenue (T.5.15).

de l'année 2011 (G.5.1), dont 4 800 dans l'UE, des chiffres en baisse régulière depuis plusieurs années, au fur et à mesure que le secteur se consolide. Huit pays européens voient s'affronter plus de 400 câblo-opérateurs (Danemark, Norvège, Bulgarie, Fédération de Russie, Roumanie, Espagne, Pologne et Hongrie). A l'inverse, neuf autres marchés sont approvisionnés par moins d'une dizaine d'opérateurs. C'est le cas du Royaume-Uni, où n'opèrent que 3 entreprises et dont le marché est pratiquement contrôlé par Virgin Media, ou de la Belgique avec 6 entreprises et seulement 4 bouquets distribués (Voo, Numericable, Telenet et AIESH).

Le nombre important de câblo-opérateurs actifs dans un pays peut masquer une concentration extrême du marché (T.5.16). Une trentaine d'entreprises sont par exemple répertoriées en France, mais Numericable (qui a par ailleurs revendu en 2011 ses actifs en Belgique et au Luxembourg) contrôle 99 % du réseau national. De la même manière, plus de 500 opérateurs sont actifs en Espagne, mais ONO contrôle près des deux tiers du marché (le chiffre monte à plus de 80 % si l'on additionne les parts de marché de Euskaltel et Telecable de Asturias).

La Suède et le Danemark rencontrent des situations similaires, respectivement avec Com Hem et YouSee (TDC). Les marchés nordiques ont connu plusieurs opérations importantes en 2011 avec le rachat au Danemark de Stofa (ex. TeliaSonera) et de l'activité câble de Canal Digital (ex-Telenor) par Ratos, la finalisation de la fusion des bouquets DNA et Welho (ex-Sanoma) en Finlande ou encore la tentative, avortée, de prise de contrôle de l'activité câble de Canal Digital (Telenor) par Com Hem en Suède.

En Allemagne, où l'on dénombre toujours une centaine d'entreprises, le secteur s'est structuré autour de 4 opérateurs principaux : Kabel Deutschland, Unity Media (Liberty Global), Kabel BW et Telecolombus. L'autorité de la concurrence allemande a donné en décembre 2011 son feu vert au rachat de Kabel BW par le groupe américain Liberty Global. Liberty Global est présent dans la câblodistribution dans plus d'une dizaine de pays en Europe (Allemagne, Autriche, Belgique, Hongrie, Irlande, Pays-Bas, Pologne, République Slovaque, République Tchèque, Roumanie, Suisse etc.), et est, avec Virgin Media, l'un des deux câblo-opérateurs les plus importants en Europe en termes de volume d'affaire (T.5.15).

(G.5.1), davon 4 800 in der EU, wobei diese Zahlen in dem Maße wie der Sektor sich konsolidiert seit mehreren Jahren regelmäßig rückläufig sind. In acht europäischen Ländern kämpfen mehr als 400 Kabelnetzbetreiber um die Kunden (Dänemark, Norwegen, Bulgarien, Russische Föderation, Rumänien, Spanien, Polen und Ungarn). Umgekehrt werden die Kunden in neun anderen Märkten von weniger als einem Dutzend Betreiber versorgt. Das ist der Fall im Vereinigten Königreich, wo nur drei Unternehmen tätig sind und der Markt praktisch von Virgin Media kontrolliert wird, oder auch in Belgien mit sechs Unternehmen und lediglich vier Bouquets (Voo, Numericable, Telenet und AIESH).

Trotz einer hohen Zahl aktiver Kabelnetzbetreiber in einem Land kann möglicherweise dennoch eine extreme Marktkonzentration gegeben sein (T.5.16). Beispielsweise wurden für Frankreich etwa dreißig Unternehmen erfasst, aber Numericable (das ansonsten 2011 seine Beteiligungen in Belgien und Luxemburg verkauft hat) kontrollierte 99 % des landesweiten Netzes. Ähnlich waren in Spanien über 500 Betreiber aktiv, aber ONO kontrollierte fast zwei Drittel des Marktes (diese Zahl steigt auf über 80 %, wenn die Marktanteile von Euskaltel und Telecable de Asturias hinzugezählt werden).

In Schweden und Dänemark war die Situation mit Com Hem bzw. YouSee (TDC) ähnlich. In den nordischen Märkten kam es 2011 zu mehreren umfangreichen Operationen: In Dänemark wurden Stofa (ehemals TeliaSonera) und die Kabelsparte von Canal Digital (ehemals Telenor) von Ratos übernommen, in Finnland wurde die Fusion der Bouquets DNA und Welho (ehemals Sanoma) abgeschlossen und in Schweden scheiterte der Versuch von Com Hem, die Kontrolle über die Kabelsparte von Canal Digital (Telenor) zu übernehmen.

In Deutschland, wo es weiterhin gut einhundert Unternehmen gibt, hat sich der Sektor um vier Hauptunternehmen strukturiert: Kabel Deutschland, Unity Media (Liberty Global), Kabel BW und Telecolombus. Das Bundeskartellamt genehmigte im Dezember 2011 die Übernahme von Kabel BW durch die amerikanische Gruppe Liberty Global. Liberty Global ist in über zehn europäischen Ländern (Deutschland, Österreich, Belgien, Irland, Niederlande, Polen, Rumänien, Schweiz, Slowakische Republik, Tschechische Republik, Ungarn usw.) im Kabelbereich präsent und hinsichtlich des Geschäftsvolumens zusammen mit Virgin Media einer der beiden führenden Kabelnetzbetreiber in Europa (T.5.15).

Source: European Audiovisual Observatory

T.5.14
G.5.7

## Households subscribing to cable in Europe 2007-2010

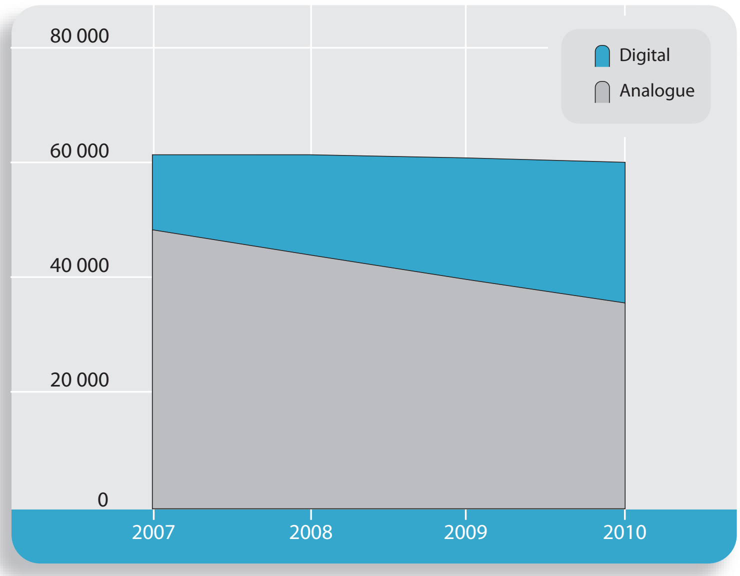
In thousand.

| | Analogue and digital | | | | | Digital | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Country** | **2007** | **2008** | **2009** | **2010** | ***2010/09*** | **2007** | **2008** | **2009** | **2010** | ***2010/09*** |
| **AT** | 1 325 | 1 343 | 1 344 | 1 339 | ***-0.4%*** | 205 | 440 | 570 | 748 | ***31.2%*** |
| **BE** | 3 788 | 3 692 | 3 626 | 3 548 | ***-2.2%*** | 614 | 862 | 1 210 | 1 461 | ***20.8%*** |
| **BG** | 1 280 | 1 176 | 1 196 | 1 214 | ***1.5%*** | 62 | 152 | 260 | 348 | ***33.8%*** |
| **CH** | 2 881 | 2 890 | 2 879 | 2 757 | ***-4.2%*** | 401 | 505 | 579 | 702 | ***21.3%*** |
| **CY** | 1 | 5 | 9 | 19 | ***106.4%*** | 0 | 0 | 1 | 3 | ***520.8%*** |
| **CZ** | 818 | 842 | 821 | 810 | ***-1.4%*** | 141 | 310 | 418 | 470 | ***12.4%*** |
| **DE** | 19 700 | 19 700 | 19 500 | 19 100 | ***-2.1%*** | 2 477 | 3 369 | 3 915 | 4 623 | ***18.1%*** |
| **DK** | 1 637 | 1 687 | 1 686 | 1 673 | ***-0.8%*** | 127 | 174 | 538 | 740 | ***37.4%*** |
| **EE** | 250 | 258 | 253 | 254 | ***0.6%*** | 10 | 15 | 19 | 30 | ***54.7%*** |
| **ES** | 1 414 | 1 517 | 1 488 | 1 485 | ***-0.2%*** | 939 | 1 112 | 1 169 | 1 221 | ***4.4%*** |
| **FI** | 1 309 | 1 350 | 1 370 | 1 390 | ***1.5%*** | 847 | 1 350 | 1 370 | 1 390 | ***1.5%*** |
| **FR** | 3 830 | 3 891 | 3 896 | 3 901 | ***0.1%*** | 1 185 | 1 435 | 1 648 | 1 938 | ***17.6%*** |
| **GB** | 3 487 | 3 630 | 3 703 | 3 787 | ***2.3%*** | 3 261 | 3 478 | 3 665 | 3 776 | ***3.0%*** |
| **HR** ❶ | 133 | 139 | 144 | 213 | ***47.7%*** | 0 | 27 | 64 | ~ | – |
| **HU** | 2 165 | 2 204 | 2 185 | 2 120 | ***-3.0%*** | 50 | 182 | 355 | 450 | ***26.8%*** |
| **IE** | 585 | 537 | 505 | 490 | ***-3.0%*** | 291 | 316 | 351 | 317 | ***-9.9%*** |
| **LT** | 383 | 422 | 420 | 425 | ***1.1%*** | 12 | 38 | 48 | 65 | ***36.8%*** |
| **LU** | 133 | 133 | 136 | 135 | ***-0.9%*** | 90 | 113 | 116 | 122 | ***4.9%*** |
| **LV** | 320 | 329 | 338 | 339 | ***0.3%*** | 23 | 39 | 46 | 67 | ***45.7%*** |
| **MK** ❶ | 122 | 134 | 144 | 350 | ***143.1%*** | 0 | 0 | 3 | ~ | – |
| **MT** | 103 | 100 | 94 | 95 | ***0.8%*** | 20 | 35 | 59 | 66 | ***11.9%*** |
| **NL** | 5 821 | 5 686 | 5 512 | 5 334 | ***-3.2%*** | 1 534 | 1 959 | 2 516 | 2 940 | ***16.9%*** |
| **NO** | 883 | 931 | 936 | 936 | ***0.0%*** | 318 | 452 | 455 | 454 | ***-0.1%*** |
| **PL** | 4 380 | 4 440 | 4 485 | 4 489 | ***0.1%*** | 204 | 492 | 772 | 1 088 | ***40.9%*** |
| **PT** | 1 488 | 1 475 | 1 438 | 1 424 | ***-1.0%*** | 322 | 560 | 812 | 1 074 | ***32.2%*** |
| **RO** | 3 550 | 3 490 | 3 410 | 3 332 | ***-2.3%*** | 65 | 200 | 320 | 400 | ***25.0%*** |
| **RU** | 13 690 | 14 680 | 15 209 | ~ | ~ | 343 | 650 | 792 | ~ | – |
| **RU** ❶ | ~ | ~ | ~ | 9 600 | ~ | ~ | ~ | ~ | 1 600 | – |
| **SE** | 2 588 | 2 448 | 2 435 | 2 393 | ***-1.7%*** | 503 | 663 | 773 | 853 | ***10.4%*** |
| **SI** | 303 | 290 | 254 | 249 | ***-1.9%*** | 20 | 39 | 56 | 74 | ***32.1%*** |
| **SK** | 743 | 758 | 745 | 745 | ***0.0%*** | 14 | 50 | 98 | 138 | ***40.8%*** |
| **TR** | 1 250 | 1 261 | 1 266 | 1 321 | ***4.3%*** | 0 | 0 | 38 | 198 | ***421.7%*** |
| ***EUR 27*** | ***61 400*** | ***61 401*** | ***60 850*** | ***60 092*** | *-1.2%* | ***13 015*** | ***17 383*** | ***21 104*** | ***24 400*** | *15.6%* |
| ***EUR 37*** | ***80 359*** | ***81 436*** | ***81 428*** | ***75 269*** | *-7.6%* | ***14 076*** | ***19 016*** | ***23 035*** | ***27 355*** | *18.8%* |

❶ Different sources for 2010 data for Croatia (HAKOM), the „Former Yugoslav Republic of Macedonia" (Agency for Electronic Communications) and the Russian Federation (J'Son and Partners Consulting).

Source: Screen Digest, European Audiovisual Observatory

In thousand.



T.5.15

# Main cable operators in Europe
## 2007-2010

Operating revenues, EUR million, current rate.

Revenues of cable operators include pay-TV revenues as well as revenues from other services (Internet, fixed telephony, mobile telephony). Multi-utility companies operating cable activities are not included.

| Rank | Company | Country | Platform | Packages | Own TV channels [9] | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Liberty Global Europe [1] | **NL** | CAB | | 173 | 3 553.0 | 4 242.2 | 4 020.5 | 5 267.0 | ***31.0%*** |
| | UPC Broadband division | | CAB, SAT | UPC (AT, CZ, IE, HU, NL, PL, RO, SI, SK), Cablecom (CH) | | 2 675.8 | 3 203.4 | 2 858.0 | 3 974.4 | ***39.1%*** |
| | - UPC Nederland B.V. | **NL** | CAB | UPC Nederland | | 773.5 | 803.7 | 820.6 | 869.9 | ***6.0%*** |
| | - Unity Media GmbH | **DE** | CAB | | | – | – | – | 866.9 | **–** |
| *p.m.* | (Old) Unity Media GmbH [2] | **DE** | CAB, SAT | Unity Media | | 1 058.0 | 1 221.3 | 1 100.0 | – | **–** |
| | - Cablecom | **CH** | CAB | Cablecom | | 632.5 | 741.7 | 744.3 | 891.2 | ***19.7%*** |
| | - UPC Brodband Ireland Ltd | **IE** | CAB | UPC | | 222.5 | 240.1 | 250.2 | 278.1 | ***11.2%*** |
| | - UPC Magyar | **HU** | CAB, SAT | UPC, UPC Direct | | 215.6 | 243.9 | 252.5 | 213.3 | ***-15.5%*** |
| | - UPC Polska | **PL** | CAB | UPC | | 92.7 | 182.4 | 211.9 | ~ | **~** |
| | - UPC Ceska Republika | **CZ** | CAB, SAT | UPC, UPC Direct | | 174.4 | 180.3 | 192.2 | 200.0 | ***4.1%*** |
| | - UPC Romania | **RO** | CAB, SAT | UPC, UPC Direct | | 182.8 | 162.5 | 152.9 | 132.9 | ***-13.1%*** |
| | - UPC Austria | **AT** | CAB | UPC Austria | | 107.2 | 91.2 | 84.9 | 79.6 | ***-6.2%*** |
| | - UPC Broadband Slovakia | **SK** | CAB, SAT | UPC, UPC Direct | | 47.2 | 56.2 | 42.1 | 37.7 | ***-10.5%*** |
| | Telenet [3] | **BE** | CAB, ThTV | Telenet | | 946.9 | 1 059.9 | 1 202.0 | 1 326.0 | ***10.3%*** |
| 2 | Virgin Media Finance PLC [4] | **GB** | | | | 5 388.4 | 4 090.6 | 4 157.6 | 4 412.7 | ***6.1%*** |
| *p.m.* | - Virgin Media, Cable Segment / Consumers | **GB** | CAB | Virgin Media | | 3 383.5 | 3 173.0 | 3 466.0 | 3 548.0 | ***2.4%*** |
| *p.m.* | - Virgin Media Segment content | **GB** | ThTV | Virgin Media TV / Sit up | | 473.7 | 368.2 | 156.1 | – | **–** |
| 3 | Kabel Deutschland [5] | **DE** | CAB, SAT | Kabel Digital | 2 | 1 209.5 | 1 388.4 | 1 516.2 | ~ | **~** |
| 4 | Grupo Corporativo ONO | **ES** | CAB | TV Esencial, TV Extra, TV Total | 3 | 1 616.0 | 1 602.5 | 1 512.0 | 1 472.0 | ***-2.6%*** |
| *p.m.* | Cableuropa Sa | **ES** | CAB | | | 1 604.5 | 1 574.6 | 1 481.5 | ~ | **~** |
| 5 | Zesko B.V. | **NL** | CAB | Ziggo | 1 | 1 093.9 | 1 238.6 | 1 284.4 | 1 375.7 | ***7.1%*** |
| 6 | Ypso France SAS (cons.) [6] | **FR** | CAB | Numericable | | 1 029.7 | 1 092.4 | ~ | ~ | **~** |
| *p.m.* | Numericable | **FR** | CAB | Numericable | | 472.4 | 572.6 | 597.6 | 636.7 | ***6.5%*** |
| *p.m.* | NC Numericable | **FR** | CAB | Numericable | | 469.4 | 456.1 | 415.6 | 368.4 | ***-11.4%*** |
| *p.m.* | Coditel Brabant | **BE** | CAB | Numericable | | 39.8 | 43.1 | 46.9 | 48.5 | ***3.4%*** |
| *p.m.* | Est Videocommunication | **FR** | CAB | Numericable | | 65.8 | 70.8 | 65.6 | 63.2 | ***-3.7%*** |
| 7 | Zon Multimedia S.A. [7] | **PT** | CAB, SAT | ZON TV Cabo | 24 | 715.7 | 776.6 | 823.0 | 859.7 | ***4.5%*** |
| *p.m.* | Zon TV Cabo Portugal | **PT** | CAB | ZON TV Cabo | | 589.7 | 633.9 | 687.2 | 709.8 | ***3.3%*** |
| 8 | DNA Oy (cons.) | **FI** | CAB | DNA | | 540.0 | 652.2 | 657.1 | 694.2 | ***5.6%*** |
| 9 | Kabel BW GmbH (cons.) | **DE** | CAB | Kabel BW | | 357.2 | 438.0 | 493.0 | 563.0 | ***14.2%*** |
| 10 | Tecteo Group (cons.) [8] | **BE** | CAB | Voo | | 336.5 | 365.5 | 440.3 | 554.9 | ***26.0%*** |

1. The Dutch holding Liberty Global Europe does not publish financial statements. We estimate the turnover from data published in USD by the US company Liberty Global Inc.
2. Unity Media GmbH was born in 2005 from the merger of the two cable operators IESY GmbH and ish. The group was fully acquired by Liberty Global in January 2010. The subsidiary Arenasat ceased operation of its satellite package in September 2010.
3. In December 2006, Liberty Global sold its interest in UPC Belgium to Telenet Group Holding N.V., the largest cable operator in Belgium. In a separate transaction, Liberty Global increased its ownership in Telenet to a controlling stake and on 31 March 2007 it owned 31.3%. Since March 2007, Liberty Global has progressively increased its ownership in Telenet to 51.1% as of 31 December 2007.
4. On 3 March 2006 ntl Incorporated completed a merger with Telewest Global, Inc. On 4 July 2006 ntl Incorporated completed its acquisition of Virgin Mobile, creating the first opportunity for customers in the UK to buy a 'quadruple-play'. The group was rebranded as Virgin Media. In June 2010 Virgin Media Inc sold the Virgin Media TV channels (Living, Livingit, Challenge, Challenge Jackpot, Bravo, Bravo 2 and Virgin1) to BskyB.
5. In April 2008, Kabel Deutschland acquired the cable group Orion GmbH (EWT, Tele-Columbus GmbH).
6. In March 2005, the company Ypso acquired France Télécom Câble, TDF Câble and NC Numericable. In November 2005 Cinven acquired Altice One, owner of Coditel in Belgium and Luxembourg and of Videocom in France. In July 2006, Ypso acquired Noos/UPC France. Since August 2007, Numericable has been the common brand. In March 2008, the US equity company, The Carlyle Group, acquired 37.85 % of the group Numericable-Completel.
7. Zon Multimedia was born from the former multimedia division of the Portuguese incumbent telcos, PT. The split began in 2006 and was completed in November 2007.
8. Tecteo Group is the new name of the electricity company «Association liégeoise d'électricité». The group has consolidated various local cable companies in Wallonia and has announced the purchase of the packaging company BETV. This purchase was operational early 2009.
9. Services with different linguistic versions are counted as different channels. Promo channels are also taken into consideration.

Source: European Audiovisual Observatory

T.5.16

## Main cable operators in Europe by country
## December 2011

| Country of establishment | Total number of cable operators in the country | Main cable operators | Group | Name of the service | Number of TV channels | Number of HD channels | Number of subscribers (thousand) | Of which digital subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|
| **AL** | 50 | Alfa Cable | | DigiCable | ~ | ~ | ~ | ~ |
| **AT** | >250 | Kabelsignal AG | Kabelsignal AG | Kabelsignal | 147 | 10 | ~ | ~ |
| | | Liwest Kabelmedien GmbH | Liwest Kabelmedien GmbH | Liwest Kabel-TV | 157 | 12 | 167 (12.2011) | 44 |
| | | UPC | Liberty Global | UPC Telekabel | 161 | 15 | 512 (09.2011) | 288 |
| **BA** | 45 | Telemach d.o.o. | Mid Europa Partners | Telemach Digital TV | 116 | 12 | ~ | ~ |
| **BE** | 6 | Brutélé SC / Tecteo | | Voo | 164 | 11 | 1 100 (12.2010) [1] | ~ |
| | | Sprl Coditel | Deficom/ Apax | Numericable | 270 | 26 | 120 (*est.* 12.2010) | ~ |
| | | Telenet N.V. | Liberty Global | Telenet | 254 | 25 | 2 214 (09.2011) | 1 361 |
| **BG** | >650 | Cabletel/Eurocom | EQT V | Blizoo | 154 | 14 | 400 (*est.* 05.2011) | ~ |
| | | Skat OOD | | Skat | 175 | 13 | ~ | ~ |
| **CH** | >240 | Cablecom GmbH | Liberty Global | UPC Cablecom | 182 | 10 | 1517 (09.2011) | 534 |
| | | 022 Télégenève SA | Cablecom (49%) | Naxoo | 289 | 21 | 85 (11.2011) | 40 |
| **CY** | 2 | Cablenet Comm. Systems Ltd. | | Cablenet | 71 | 1 | 23 (06.2011) | ~ |
| | | Lumiere TV Ltd. | | LTV Cable & LTV 3Play | 79 | 3 | ~ | ~ |
| **CZ** | 28 | Nej TV [2] | BKS Capital Partners | Nej TV | 142 | 15 | 75 (12.2010) | ~ |
| | | Rio Media Group [3] | Argus Capital Partners | Rio Media | 112 | 12 | 115 (05.2011) | ~ |
| | | UPC Ceska Republika a.s. | Liberty Global | UPC | 126 | 13 | 501 (09.2011) | 415 |
| **DE** | >100 | TELE COLUMBUS MULTIMEDIA GMBH. | Tele Columbus Group | Telecolumbus | 129 | 10 | 2 300 (*est.* 12.2010) | ~ |
| | | Kabel BW | Liberty Global [4] | KBW | 261 | 31 | 2 400 (12.2011) | ~ |
| | | Kabel Deutschland | | Kabel Deutschland | 195 | 16 | 8 700 (06.2011) | ~ |
| | | Unity Media GmbH | Liberty Global | Unity Media | 210 | 22 | 4 461 (09.2011) | 1 689 |
| **DK** | >1 500 | Canal Digital Kabel TV A/S | Ratos [5] | Canal Digital Kabel TV | 123 | 15 | 20 (09.2011) | ~ |
| | | Stofa A/S | Ratos [5] | Stofa | 135 | 22 | 350 (12.2010) | ~ |
| | | YouSee A/S | TDC | YouSee | 114 | 17 | 1 352 (09.2011) | ~ |
| **EE** | 3 | AS Starman | | Starman | 135 | 19 | 137 (12.2008) | ~ |
| | | STV AS | | STV Kaabeltelevisioon | 161 | 7 | 65 (12.2008) | ~ |
| **ES** | >500 | Cableuropa SAU | ONO | Ono | 140 | 0 | 947 (09.2011) | ~ |
| | | Euskaltel | | Euskaltel | 109 | 1 | 157 (09.2011) | ~ |
| | | Telecable de Asturias SA | | TeleCable | 78 | 1 | 138 (09.2011) | ~ |
| **FI** | 25 | DNA Finland Oy | Finda / Sanoma Television | Welho | 159 | 21 | 598 (12.2010) | 598 |
| | | Elisa Oyj | | Elisa | 157 | 23 | 251 (06.2011) | 251 |
| | | TeliaSonera Finland Oy | TeliaSonera | Sonera | 132 | 18 | 238 (03.2011) | 238 |
| **FR** | 30 | NC Numericable | Cinven / Altice | Numéricable | 362 | 24 | 3 300 (*est.* 12.2010) | ~ |
| **GB** | 3 | Virgin Media | Virgin Media Inc | Virgin TV | 206 | 26 | 3 762 (05.2011) | 3 749 |
| **HR** | 20 | BEWAG Group | Telekom Austria | B.NET | 214 | 11 | 120 (06.2011) | ~ |
| **HU** | >400 | T-Kábel Magyarország | Deutsche Telekom | T-Kabel | 138 | 7 | 420 (12.2009) | ~ |
| | | UPC Magyarország | Liberty Global | UPC | 133 | 13 | 619 (09.2011) | 288 |
| **IE** | 2 | UPC Broadband Ireland Limited | Liberty Global | UPC | 146 | 13 | 416 (09.2011) | 328 |
| **IS** | 3 | Siminn | Exista | Siminn | 78 | 1 | ~ | ~ |
| **LI** | 1 | Telecom Liechtenstein | | TV Digital | 109 | 9 | ~ | ~ |

T.5.16

## Main cable operators in Europe by country (Continued)
## December 2011

| Country of establishment | Total number of cable operators in the country | Main cable operators | Group | Name of the service | Number of TV channels | Number of HD channels | Number of subscribers (thousand) | Of which digital subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|
| **LT** | 47 | UAB Balticum TV | Balticum Grupe | Balticum TV | 169 | 0 | 65 (09.2011) | 19 |
| | | UAB Cgates | Advanced Broadband Ltd/ UAB SEB Venture Capital | Cgates | 98 | 0 | 73 (09.2011) | 18 |
| | | UAB Vinita | Init | Vinita | 256 | 24 | 69 (09.2011) | 5 |
| **LU** | 55 | Eltrona | Entreprise des P&T | Imagin | 211 | 29 | 115 (12.2010) | ~ |
| | | Coditel SARL | Deficom/ Apax | Numericable | 217 | 17 | 30 (*est.* 12.2010) | ~ |
| **LV** | 57 | Baltkom TV SIA | | Baltkom | 150 | 10 | 140 (12.2010) | ~ |
| | | Izzi Com SIA | Contaq Latvian Cable | Izzi | 142 | 6 | 110 (12.2010) | ~ |
| **MK** | 53 | Blizoo Macedonia | EQT V | Blizoo | 127 | 7 | 70 (*est.* 05.2011) | ~ |
| **MT** | 1 | Melita Plc. | GMT Comm. Partners | Melita | 165 | 16 | 83 (09.2011) | 73 |
| **NL** | 21 | CAIW Diensten B.V. | CAIW Holding (6) | Caiway | 235 | 36 | 143 (03.2011) | 143 |
| | | UPC Nederland B.V. | Liberty Global | UPC | 195 | 28 | 1 837 (09.2011) | 974 |
| | | Zesko B.V. | Warburg Pincus / Cinven | Ziggo | 176 | 22 | 3 021 (09.2011) | 2101 |
| **NO** | 950 | Canal Digital Norge AS | Telenor | Canal Digital Kabel TV | 128 | 23 | 506 (09.2011) | ~ |
| | | Get AS | | Get | 145 | 18 | 410 (06.2010) | ~ |
| **PL** | >400 | Multimedia Polska S.A. | | Multimedia Telewizji Cyfrowej DTV | 124 | 17 | 725 (09.2010) | 183 |
| | | UPC Polska Sp. z o.o. | Liberty Global | UPC | 186 | 25 | 1 493 (09.2011) | 585 |
| | | Vectra S.A. | | Vectra | 186 | 20 | 787 (09.2011) | 360 |
| **PT** | 6 | Cabovisao | Cogeco Cable | | 123 | 20 | 256 (08.2011) | 165 |
| | | Zon Multimedia | Zon Multimedia | Zon TV Cabo | 163 | 46 | 1 160 (12.2010) | ~ |
| **RO** | >400 | Digital Cable Systems (DCS) | AIG Capital Partners | AKTA | 72 | ~ | 180 (12.2010) | ~ |
| | | RCS/RDS | RCS/RDS | Digi TV Cablu | 99 | 8 | 1 400 (12.2010) | ~ |
| | | UPC Romania SA | Liberty Global | UPC Digital | 153 | 14 | 867 (09.2011) | 329 |
| **RU** | 600 | MTS (incl. Comstar) | Sistema | MTS | ~ | ~ | 2 920 (12.2010) | ~ |
| | | ER-Telecom | | Divan-TV | ~ | ~ | 1 200 (12.2010) | ~ |
| | | Rostelecom (incl. NT) | | Rostelecom | ~ | ~ | 510 (12.2010) | ~ |
| **SE** | 91 | Canal Digital Sverige AB | Telenor | Canal Digital Kabel TV | 125 | 14 | 196 (09.2011) | ~ |
| | | Com Hem AB | | Com Hem | 154 | 22 | 620 (12.2010) (7) | ~ |
| | | Tele2 Syd AB | Tele2 | Tele2 | 114 | 4 | 220 (12.2010) | ~ |
| **SI** | 73 | Telemach | Mid Europa Partners | Telemach Digital TV | 153 | 11 | 190 (12.2011) | ~ |
| **SK** | 22 | UPC Broadband Slovakia | Liberty Global | UPC Digital | 125 | 11 | 214 (09.2011) | 102 |
| **TR** | 12 | Türksat A.S. | | | 132 | 10 | 1 300 (*est.* 12.2011) | ~ |

(1) There is no breakdown of the number of subscribers to the Voo package between the two companies which distributes the platform (Brutélé and Tecteo).
(2) Took over Kabelova Televize Prerov and Kabelova Televize Trinec in 2010.
(3) Rio Media started to launch a digital version of their cable package on the DTT system in several cities in 2010.
(4) Liberty Global was given clearance from the German competition authorities in December 2011 to take over Kable BW.
(5) Ratos took over the cable operator Stofa (previously belonging to TeliaSonera) in July 2011 and the cable operations of Canal Digital Denmark in October 2011 (previously controlled by Telenor).
(6) The takeover of CAIW by KPN was announced mid 2011 but still investigated by the competition authority end 2011.
(7) In addition, Com Hem has almost 1,2 million subscribers through 'landlords contracts'.
There are no cable networks in Greece and Italy.

Source: European Audiovisual Observatory, MAVISE database, company websites and reports

T.5.17
G.5.8

# Consumer expenditures for cable audiovisual services

## 2006-2010 EUR million. Including transactional services, NVoD or VoD.

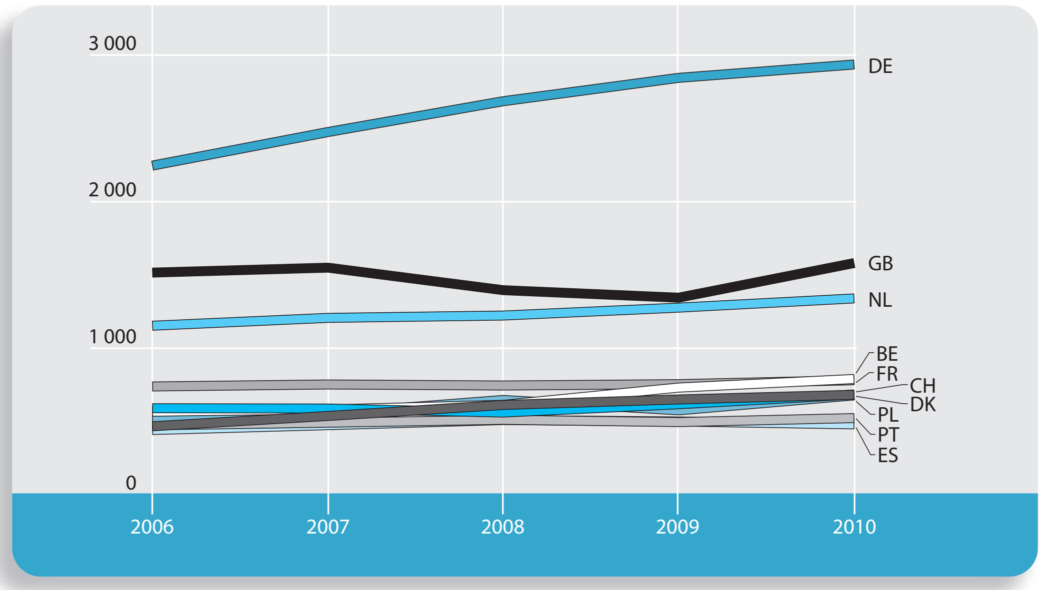
| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **AT** | 267.7 | 288.3 | 318.2 | 341.7 | 366.8 | *7.37%* |
| **BE** | 553.7 | 568.9 | 600.7 | 719.9 | 779.3 | *8.24%* |
| **BG** | 124.4 | 139.4 | 145.3 | 145.3 | 115.8 | *-20.29%* |
| **CH** | 577.3 | 575.4 | 547.4 | 604.8 | 672.0 | *11.10%* |
| **CY** | 0.0 | 0.1 | 0.6 | 1.4 | 3.0 | *108.17%* |
| **CZ** | 106.0 | 118.2 | 146.4 | 142.8 | 152.1 | *6.58%* |
| **DE** | 2 253.2 | 2 484.9 | 2 697.7 | 2 859.0 | 2 951.2 | *3.23%* |
| **DK** | 452.7 | 523.9 | 600.0 | 637.8 | 670.2 | *5.08%* |
| **EE** | 20.7 | 23.5 | 26.0 | 28.5 | 27.9 | *-2.14%* |
| **ES** | 427.0 | 460.4 | 495.9 | 485.9 | 465.9 | *-4.11%* |
| **FI** | 189.0 | 219.4 | 202.5 | 216.7 | 205.5 | *-5.21%* |
| **FR** | 727.6 | 741.5 | 734.3 | 743.5 | 770.6 | *3.64%* |
| **GB** | 1 514.1 | 1 548.2 | 1 392.6 | 1 340.9 | 1 579.7 | *17.81%* |
| **GR** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| **HU** | 372.3 | 408.4 | 421.9 | 379.3 | 386.5 | *1.91%* |
| **IE** | 212.2 | 227.3 | 234.4 | 240.8 | 244.2 | *1.40%* |
| **IT** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| **LT** | 22.6 | 25.0 | 28.5 | 30.8 | 30.5 | *-0.90%* |
| **LU** | 20.9 | 21.8 | 22.4 | 24.4 | 24.7 | *1.10%* |
| **LV** | 27.5 | 31.0 | 32.5 | 33.8 | 35.3 | *4.30%* |
| **MT** | 12.8 | 16.4 | 18.6 | 18.8 | 19.4 | *3.29%* |
| **NL** | 1 147.3 | 1 201.4 | 1 217.5 | 1 272.1 | 1 335.7 | *5.00%* |
| **NO** | 279.9 | 297.2 | 317.7 | 317.4 | 384.4 | *21.11%* |
| **PL** | 495.9 | 540.9 | 634.5 | 562.8 | 666.1 | *18.34%* |
| **PT** | 459.3 | 477.7 | 497.5 | 481.8 | 509.2 | *5.67%* |
| **RO** | 269.1 | 292.2 | 262.4 | 233.3 | 232.5 | *-0.33%* |
| **RU** | 272.8 | 359.0 | 445.0 | 439.7 | ~ | *~* |
| **SE** | 378.0 | 410.4 | 391.3 | 355.2 | 402.1 | *13.19%* |
| **SI** | 44.3 | 45.0 | 49.2 | 49.1 | 47.8 | *-2.62%* |
| **SK** | 83.8 | 95.3 | 104.7 | 111.9 | 118.8 | *6.18%* |
| **TR** | 63.2 | 63.1 | 58.8 | 59.8 | 64.3 | *7.68%* |
| ***EUR 27*** | ***10 182.2*** | ***10 909.6*** | ***11 275.5*** | ***11 457.4*** | ***12 140.5*** | ***5.96%*** |
| ***EUR 37*** | ***11 375.5*** | ***12 204.4*** | ***12 644.5*** | ***12 879.1*** | ***~*** | ***~*** |

No data for Albania, Bosnia and Herzegovina, Croatia, Iceland, Liechtenstein and 'The Former Yugoslav Republic of Macedonia'.

Data only until 2009 for the Russian Federation.

Source: Screen Digest, European Audiovisual Observatory

In thousand.



The number of IPTV (internet protocol television) platforms continued to grow in Europe in 2011, rising from 130 to 150 (G.5.1). The increase is even more spectacular when only the EU countries are taken into account, since the number of IPTV providers went up from 91 at the end of 2010 to 130 a year later. In 2008, there were only 98 in Europe as a whole and 66 in the EU. Following the launch of Tivibu (Türk Telecom) in Turkey in 2011, IPTV services are now available in all European countries with the exception of Albania and Malta (T.5.18).

In practical terms, European IPTV platforms offer access to a wide range of channels, often more than 100 and even as many as 300 or more, as in the case of the French platforms. They also permit the transmission of a large number of HD channels. At the end of 2011, five IPTV providers offered access to more than 30 HD channels: Online Breedband (Netherlands), Swisscom (Switzerland), TP (Poland), Lyse Energi (Norway) and Portugal Telecom (Portugal). The IPTV platforms also generally include additional services, such as catch-up TV and video on demand (VoD). While most IPTV packages mainly offer access to their own catalogue of films or videos on demand, some operators provide an extensive range of VoD services, with thirty available from Fastweb in Italy, twenty from Darty in France and fifteen from TalkTalk in the United Kingdom (T.5.18).

The French market continues to play a particular role in the rapid rise of IPTV in Europe: 27% of European subscribers at the end of 2010 were French. More importantly, 40% of the money spent on IPTV in Europe was spent by French subscribers. Seven platforms share the market in mainland France and all offer more than 300 TV channels. In particular, French operators have all, in recent years, focused on the provision of foreign channels, either individually or in minipackages, such as the "Great Wall" package of Chinese channels or the "Arabesque" package of Arab channels offered by Free. In this respect, IPTV provides access to services that were previously only available via satellite (Arab, African and Asian channels) as well as channels from Europe and the rest of the world.

Of course, the success of IPTV in France is not replicated throughout Europe. After France, the other major markets (in absolute terms) are Germany, Spain and Belgium, each of which had more than 800,000 households with subscriptions to an IPTV service at the end of 2010 (T.5.19). In relative terms, IPTV has a greater presence in Slovenian, Croatian and Estonian homes, where more than 20% are equipped to receive it, followed by households in Belgium, Cyprus and

Le nombre de plates-formes IPTV (télévision par protocole IP) a encore progressé en Europe au cours de l'année 2011, passant de 130 à 150 (G.5.1). La progression est encore plus spectaculaire lorsque l'on ne considère que les pays de l'Union européenne (UE), puisque le nombre de fournisseurs IPTV passe de 91 fin 2010 à 130 un an plus tard. En 2008, ils n'étaient que 98 en Europe et 66 dans l'UE. Suite au lancement en 2011 de Tivibu (Türk Telecom) en Turquie, des services IPTV sont désormais disponibles dans tous les pays européens à l'exception de l'Albanie et de Malte (T.5.18).

Concrètement, les plates-formes IPTV européennes proposent l'accès à une gamme étendue de chaînes, souvent plus d'une centaine et jusqu'à plus de 300 comme dans le cas des plates-formes françaises. Elles permettent aussi la diffusion de nombreuses chaînes en haute-définition. A la fin de l'année 2011, cinq fournisseurs IPTV proposent l'accès à plus de 30 chaînes HD : Online Breedband (Pays-Bas), Swisscom (Suisse), TP (Pologne), Lyse Energi (Norvège) et Portugal Telecom (Portugal). Les plates-formes IPTV incluent aussi généralement des services additionnels comme la télévision de rattrapage ou la vidéo à la demande (VoD). Si la plupart des plates-formes IPTV proposent essentiellement l'accès à leur propre catalogue de films ou vidéos à la demande, certains opérateurs offrent une gamme étendue de services VoD : une trentaine pour Fastweb en Italie, une vingtaine pour Darty en France ou encore une quinzaine au Royaume-Uni via la plate-forme Talk Talk (T.5.18).

Le marché français continue de jouer un rôle particulier dans l'essor de l'IPTV en Europe. En effet, à la fin de l'année 2010, 27 % des abonnés IPTV européens sont français. Surtout, 40 % des dépenses IPTV européennes ont été le fait des abonnés français. Sept plates-formes se partagent le marché métropolitain. Elles proposent toutes plus de 300 chaînes de télévision. En particulier, les opérateurs français ont tous mis l'accent ces dernières années sur la fourniture de chaînes étrangères, à l'unité ou dans des mini-bouquets, à l'image du pack « la grande muraille » de chaînes chinoises ou du pack « arabesque » de chaînes arabes, par Free. En ce sens, l'IPTV favorise l'accès à des services jusqu'alors uniquement disponibles par satellite (chaînes arabes, africaines et asiatiques) et la circulation des chaînes européennes et du reste du monde.

Bien sûr, le succès de l'IPTV n'est pas partout en Europe de même ampleur qu'en France. Derrière elle, les autres marchés les plus importants, en valeur absolue, sont l'Allemagne, la l'Espagne et la Belgique, qui comptent plus de 800 000 foyers abonnés à un service IPTV fin 2010 (T.5.19).

Die Anzahl der IPTVPlattformen (Fernsehen über das Internet-Protokoll) ist 2011 von 130 auf 150 weiter gestiegen (G.5.1). Diese Zunahme ist noch spektakulärer, wenn nur die EU-Mitgliedsländer betrachtet werden, da hier die Zahl der IPTV-Anbieter von 91 Ende 2010 auf 130 ein Jahr später anstieg. 2008 waren es nur 98 in Europa und 66 in der EU. Nach dem Start von Tivibu (Türk Telecom) 2011 in der Türkei werden nunmehr in allen europäischen Ländern außer Albanien und Malta IPTV-Dienste angeboten (T.5.18).

Die europäischen IPTVPlattformen bieten inzwischen den Zugang zu einer Vielzahl von Sendern an, nicht selten hundert und im Fall Frankreichs sogar bis zu über 300. Sie ermöglichen auch die Ausstrahlung zahlreicher hochauflösender Sender. Ende 2011 boten fünf IPTV-Anbieter Zugang zu über 30 HD-Sender an: Online Breedband (Niederlande), Swisscom (Schweiz), TP (Polen), Lyse Energi (Norwegen) und Portugal Telecom (Portugal). Die IPTVPlattformen bieten üblicherweise auch zusätzliche Dienste an wie *Catch-up*-TV oder einen Video-Abrufdienst (VoD). Auch wenn die meisten IPTVPlattformen einen Zugang ausschließlich zum eigenen Filmkatalog oder den eigenen Abrufvideos anbieten, sind bei einigen Betreibern umfassende Abrufdienste erhältlich: rund dreißig bei Fastweb in Italien, um die zwanzig bei Darty in Frankreich oder etwa fünfzehn im Vereinigten Königreich über die Plattform Talk Talk (T.5.18).

Der französische Markt spielt beim zunehmenden Erfolg von IPTV in Europa weiterhin eine besondere Rolle. Ende 2010 hatten 27 % aller europäischen IPTV-Abonnenten einen französischen Vertrag. Vor allem aber wurden in Frankreich 40 % der europäischen IPTV-Ausgaben gemacht. Sieben Plattformen haben sich den Markt in Frankreich aufgeteilt. Sie bieten alle über 300 Fernsehsender an. Die französischen Betreiber haben sich in den vergangenen Jahren vor allem auf die Bereitstellung ausländischer Sender konzentriert, sei es einzeln oder in Minipaketen, wie beispielsweise die Pakete „Grande Muraille" (Chinesische Mauer) mit chinesischen Sendern oder „Arabesque" mit arabischen Sendern des Betreibers Free. So gesehen fördert das IP-Fernsehen den Zugang zu (arabischen, afrikanischen und asiatischen) Diensten, die bislang nur via Satellit empfangen werden konnten, sowie die Verbreitung von Sendern aus Europa und dem Rest der Welt.

Natürlich ist das IPFernsehen nicht überall in Europa so erfolgreich wie in Frankreich. Auf den weiteren Plätzen folgen die anderen wichtigen Märkte, zu denen in absoluten Zahlen Deutschland, Belgien und Spanien zählen, die Ende 2010

Portugal, where the penetration rate is between 15 and 20%. On the other hand, IPTV is still marginal in ten or more European countries: it is received by no more than 3% of homes in Bulgaria, Finland, Ireland, Italy, Poland, Romania, the Russian Federation and the United Kingdom. The most significant rise in the number of households receiving IPTV between 2009 and 2010 was in Romania, "the former Yugoslav Republic of Macedonia", Turkey and Latvia, where the growth rate exceeded 100%, which was mainly due to the late launch of IPTV services in these countries. Finally, the IPTV household penetration rate only dropped in two European countries in 2010: Cyprus and the Czech Republic.

At the European level, IPTV is used by almost 5% of households, the figure rising to 6% in the case of EU homes. The number of subscribers rose in 2010 by 30% in Europe as a whole (and 28% in the case of the EU countries.), as indicated by table T.5.19. As table T.5.20 demonstrates, European TV viewers spent more than EUR 3.1 billion on IPTV services in 2010 (EUR 2.9 billion in the EU), 44% more than the previous year. Of course, the amount spent is small in comparison to the cable (EUR 12 billion) and satellite (EUR 16 billion) markets, but it still represents twice the sum spent on pay DTT. Not surprisingly, consumer expenditure is highest in France, where it exceeded 1 billion euros for the first time in 2010, followed by Belgium, Germany and Spain.

En termes relatifs, l'IPTV est le plus présent dans les foyers slovènes, croates ou estoniens où plus de 20 % des foyers sont équipés pour la réception IPTV, puis dans les foyers belges, chypriotes et portugais où les taux se situent entre 15 et 20 %. A l'inverse, l'IPTV est encore marginal dans une dizaine de pays européens. Il n'équipe pas plus de 3 % des foyers en Bulgarie, Finlande, Irlande, Italie, Pologne, Roumanie, Fédération de Russie ou au Royaume-Uni. Les taux de croissance dans l'équipement IPTV des ménages les plus significatifs entre 2009 et 2010 sont rencontrés en Roumanie, dans l' « Ex-République yougoslave de Macédoine », en Turquie et en Lettonie, où ils dépassent 100 %, principalement du fait du lancement tardif de services IPTV dans ces pays. Enfin, le taux d'équipement IPTV des ménages ne recule en 2010 que dans deux pays européens : Chypre et la République tchèque.

Au niveau européen, l'IPTV équipe presque 5 % des foyers, et plus de 6% des foyers de l'U.E. Le nombre d'abonnés a progressé en 2010 de 30 % en Europe (et 28 % pour les seuls pays de l'UE), comme indiqué par le T.5.19. Surtout, comme le montre le tableau T.5.20, les téléspectateurs européens ont dépensé en 2010 plus de 3,1 milliards EUR pour leurs services IPTV (2,9 milliards pour l'UE), un chiffre en progression de 44 % en un an. Bien sûr, le montant des dépenses s'avère faible en comparaison des marchés de la télévision par câble (12 milliards) et par satellite (16 milliards), mais il représente tout de même le double des montants dépensés pour la TNT payante. C'est logiquement en France que les dépenses des consommateurs sont les plus importantes, dépassant le milliard d'euros pour la première fois en 2010, devant la Belgique, l'Allemagne et l'Espagne.

über 800 000 Haushalte mit einem Abo bei einem IPTV-Dienst hatten (T.5.19). Relativ betrachtet waren die Haushalte in Estland, Kroatien und Slowenien mit über 20 % am häufigsten mit IPTV ausgestattet, gefolgt von Belgien, Portugal und Zypern, wo es zwischen 15 und 20 % waren. Umgekehrt war IPTV noch in rund zehn europäischen Ländern unbedeutend: Ausgestattet waren nicht mehr als 3 % der Haushalte in Bulgarien, Finnland, Irland, Italien, Polen, Rumänien, Russische Föderation oder im Vereinigten Königreich. Die signifikantesten Wachstumsraten bei der IPTV-Ausstattung der Haushalte zwischen 2009 und 2010 gab es in Rumänien, in der „ehemaligen jugoslawischen Republik Mazedonien", in der Türkei und in Lettland, wo sie bei über 100 % lagen, hauptsächlich aufgrund des späten Starts der IPTV-Dienste in diesen Ländern. Rückläufig war die IPTV-Ausrüstungsrate der Haushalte 2010 nur in zwei europäischen Ländern: in Zypern und in der Tschechischen Republik.

In Europa sind fast 5 % der Haushalte und innerhalb der EU über 6 % mit IPTV ausgestattet. Die Abonnentenzahlen sind 2010 um 30 % in Europa angestiegen (und alleine in den EU-Ländern um 28 %), wie aus Tabelle T.5.19 hervorgeht. Vor allen Dingen aber haben Fernsehzuschauer in Europa, wie Tabelle T.5.20 zu entnehmen ist, 2010 über 3,1 Mrd. Euro für ihre IPTVDienste ausgegeben (davon 2,9 Mrd. in der EU) – ein Zuwachs um 44 % gegenüber dem Vorjahr. Diese Summe ist natürlich im Vergleich zu den Ausgaben für Kabelfernsehen (12 Mrd.) und Satellitenfernsehen (16 Mrd.) eher gering, aber immerhin doppelt so hoch wie die Ausgaben für das Bezahlfernsehen über DVBT. Logischerweise ist Frankreich das Land, in dem die Verbraucherausgaben in diesem Segment am höchsten sind und zum ersten Mal seit 2010 über einer Milliarde Euro liegen, gefolgt von Belgien, Deutschland und Spanien.

Source: European Audiovisual Observatory

T.5.18

# Main IPTV operators in Europe
## December 2011

| Country | Total number of IPTV operators in the country | Company | Group | Name of the service | Date of launch | Number of TV channels | Number of HD channels | Number of VoD services | Number of IPTV subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|---|
| **AT** | 3 | Infotech Edv-Systeme GmbH | | Inext TV | 2007 | 49 | | 1 | ~ |
| | | Telekom Austria Aktiengesellschaft | Telekom Austria Group | A1 TV | 2003 | 161 | 16 | 1 | 186 (09.2011) |
| **BA** | 3 | BH Telecom | | Moya TV | 2010 | 78 | | 1 | ~ |
| **BE** | 3 | Belgacom Skynet | Belgacom | Belgacom TV | 2005 | 194 | 26 | 1 | 1 139 (09.2011) |
| | | Favco SPRL | Alpha Networks | Billi | 2010 | 65 | 0 | 0 | ~ |
| | | Scarlet Belgium SA | Belgacom | Belgacom TV | 2010 | 194 | 26 | 1 | ~ |
| **BG** | 3 | Mobiltel Ead | Telekom Austria Group | Quarto | 2009 | 164 | 9 | 1 | ~ |
| | | Networx Bulgaria Ood (taken over by Mobitel in 2010) | Telekom Austria Group | Networx TV | 2007 | 125 | 2 | 0 | ~ |
| | | Vestitel Bg Ad | Gazprom-Media | Tivia | 2009 | 98 | 6 | 1 | 2 (12.2009) |
| **CH** | 1 | Swisscom | Swisscom | Swisscom TV | 2006 | 282 | 34 | 1 | 556 (09.2011) |
| **CY** | 2 | Cyta (Cyprus Telecommunications Authority) | | Cytavision | 2004 | 79 | 2 | 1 | 35 (12.2010) |
| | | Primetel Plc | | PrimeTV | 2006 | 74 | 8 | 5 | 30 (12.2010) |
| | | Rio Media Group | Rio Media Group | Rio Media | 2009 | 106 | 8 | 0 | ~ |
| **CZ** | 5 | Telefonica O2 Czech Republic, A.S. | TELEFONICA SA | O2 TV | 2006 | 87 | 6 | 2 | 137 (12. 2010) |
| | | T-Systems Czech Republic A.S. | Deutsche Telekom AG | Via TV | 2009 | 89 | 14 | 0 | ~ |
| **DE** | 3 | Deutsche Telekom AG | Deutsche Telekom AG | T-Home Entertain | 2006 | 185 | 18 | 1 | 1 300 (05.2011) |
| | | Hansenet Telekommunikation GmbH (Telefonica) | TELEFONICA SA | Alice | 2006 | 109 | 7 | 1 | ~ |
| **DK** | 23 | Dansk Bredbaand A/S | Waoo! A/S | Dansk Bredbånd Bredbånds-TV | 2005 | 97 | 11 | 2 | 21 (12.2010) |
| | | Altibox Danmark A/S | Lyse Energi | Altibox | 2009 | 86 | 11 | 2 | 10 (12.2009) |
| | | TDC A/S | TDC | TDC Home Trio/ Viasat pakken | 2007 | 71 | 15 | 1 | 96 (12.2010) |
| | | Telia Telecom A/S | TeliaSonera | Telia TV | 2007 | 67 | 0 | 3 | 11 (09.2011) |
| | | Waoo! A/S | | Waoo! | 2010 | 103 | 12 | 9 | 10 (12.2010) |
| **EE** | 1 | Elion Ettevõtted As | TeliaSonera | Nuti TV | 2006 | 195 | 7 | 3 | 135 (09.2011) |
| **ES** | 4 | France Telecom España SA | France Télécom | Orange TV | 2006 | 61 | 0 | 1 | 67 (09.2010) |
| | | Jazz Telecom S.A. | | Seleccion y Canal+ Liga | 2006 | 73 | 0 | 2 | 9 (06.2010) |
| | | Telefonica de España SA | Telefonica | Movistar Imagenio | 2005 | 142 | 7 | 1 | 803 (09.2011) |
| | | Vodafone España SA | Vodafone Group | Vodafone Internet TV | 2010 | 33 | 4 | 0 | ~ |
| **FI** | >5 | Elisa Oyj | | Elisa Viihde | 2009 | 141 | 17 | 5 | ~ |
| | | Teliasonera Finland Oyj | TeliaSonera | Koti TV | ~ | 145 | 18 | 1 | 1 (12.2009) |
| **FR** | 12 [1] | Bouygues Telecom | Bouygues | Bbox | 2008 | 346 | 8 | 4 | 1 111 (09.2011) |
| | | Darty | | Dartybox | 2006 | 308 | 28 | 20 | 310 (12.2010) |
| | | France Télécom | France Télécom | La TV d'Orange | 2004 | 346 | 23 | 2 | 4 124 (09.2011) [1] |
| | | Free | Iliad | Freebox | 2004 | 467 | 24 | 13 | 4 790 (09.2011) |
| | | Free | Iliad | Alice Box | 2005 | 393 | 22 | 5 | 432 (09.2011) |
| | | SFR | Vivendi | Neufbox de SFR | 2004 | 427 | 10 | 1 | 5 012 (09.2011) |

T.5.18

## Main IPTV operators in Europe (Continued)
## December 2011

| Country | Total number of IPTV operators in the country | Company | Group | Name of the service | Date of launch | Number of TV channels | Number of HD channels | Number of VoD services | Number of IPTV subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|---|
| GB | 3 | British Telecommunications PLC | BT Group PLC | BT Vision | 2006 | 50+ | | 2 | 638 (11.2011) |
| | | IP Vision (UK) Ltd | Netgem S.A | Fetch TV | 2008 | 54 | 5 | 5 | ~ |
| | | Talk Talk | TalkTalk Telecom Group PLC | TalkTalk TV [3] | 2007 | 88 | 0 | 14 | 100 (12.2008) |
| GR | 3 | Hellas Online S.A. | | Hol TV | 2009 | 27 | 1 | 1 | ~ |
| | | Hellenic Telecommunications Organization S.A. | Deutsche Telekom | OTE TV via Conn-X | 2008 | 42 | 0 | 2 | 50 (12.2010) |
| | | On Telecoms | | ON-TV | 2007 | 53 | 0 | 1 | 130 (12.2010) |
| HR | 5 | AMIS Telekom | | Amis TV | 2009 | 80 | 1 | | ~ |
| | | T-HT D.D. | Deutsche Telekom AG | MaxTV | 2007 | 163 | 13 | 1 | 303 (06.2011) |
| | | Iskon Internet D.D. | Deutsche Telekom AG | Iskon TV | 2009 | 99 | 0 | 2 | included in above |
| HU | 4 | Invitel Távközlési Zrt. ("Invitv") | Mid Europa Partners LLP | Invitv | 2007 | 93 | | 0 | ~ |
| | | Magyar Telekom | Deutsche Telekom AG | T-Home TV | 2006 | 110 | 8 | 3 | 163 (06.2011) |
| IE | 3 | 3play Plus Limited | PlanNet21 Communi-cations Ltd | Homevision | 2007 | 44 | | 1 | ~ |
| | | Magnet Networks Limited | Columbia Ventures Corporation | Magnet Entertainment | 2005 | 82 | 2 | | 15 (12.2011) |
| | | Smart Telecom PLC | Digiweb Group | Smart Digital TV | 2008 | 100 | | | ~ |
| IS | 2 | Siminn | | Siminn TV | 2004 | 80 | 2 | 1 | ~ |
| | | Vodafone | | Vodafone TV | 2008 | 71 | 1 | ~ | ~ |
| IT | 3 | Fastweb Spa | Swisscom | Fastweb TV | 2001 | 184 | 0 | 36 | 220 (03.2010) |
| | | Telecom Italia Spa | Telecom Italia Spa | l'IPTV di Telecom Italia | 2005 | 178 | 0 | 3 | 374 (12.2010) |
| | | Wind Telecomunicazioni Spa | | Infostrada | 2007 | 153 | 6 | 1 | 5 (12.2008) |
| LT | 8 | Teo Lt, Ab | Teliasonera AB | Gala TV | 2006 | 130 | 8 | 10 | 76 (09.2011) |
| LU | 1 | Entreprise des P&T | Entreprise des P&T | La Tele des P&T | 2008 | 215 | 22 | 1 | 16 (12.2010) |
| LV | 2 | Lattelecom Sia | Teliasonera AB | Interaktiva TV | 2007 | 147 | 7 | 1 | 69 (12.2010) |
| | | Livas Telecommunications | | Livas IPTV | 2009 | 51 | 0 | 0 | ~ |
| MK | 1 | Makedonski Telekom | Deutsche Telekom AG | Max TV | 2008 | 125 | 4 | 2 | 34 (06.2011) |
| NL | 6 | Koninklijke Kpn N.V. | KPN | Interactieve TV van KPN | 2006 | 132 | 16 | 1 | 302 (12.2010) |
| | | Online Breedband B.V. | Deutsche Telekom AG | Online | 2009 | >400 [4] | 34 | | ~ |
| | | Tele2 | | Tele2 Televisie | 2005 | 88 | 6 | 1 | 325 (12.2009) |
| NO | 5 | Lyse Energi | | Altibox | 2002 | 192 | 31 | 4 | 225 (12.2010) |
| | | NextGenTel AS | Teliasonera AB | NextTV | 2005 | 107 | 10 | 5 | 6 (12.2010) |
| | | Telenor ASA | | Telenor TV | 2010 | 107 | 26 | 1 | ~ |
| PL | 5 | Multimedia Polska S.A. | | Multimedia Cyfrowa Telewizja IPTV | 2006 | 128 | 16 | 2 | 9 (12.2010) |
| | | Netia SA | | Telewizja Osobista | 2011 | 104 | 10 | 2 | ~ |
| | | Telefonia Dialog S.A. | | Dialog Telewizja Cyfrowa | 2007 | 97 | 5 | 1 | 35 (12.2010) |
| | | Telekomunikacja Polska S.A. | France Telecom | Videostrada TP | 2006 | 123 | 32 | 2 | 115 (12.2010) |

T.5.18

# Main IPTV operators in Europe (Continued)
## December 2011

| Country | Total number of IPTV operators in the country | Company | Group | Name of the service | Date of launch | Number of TV channels | Number of HD channels | Number of VoD services | Number of IPTV subscribers (thousand) |
|---|---|---|---|---|---|---|---|---|---|
| **PT** | 4 | Portugal Telecom Sgps, S.A. | Portugal Telecom Sgps, S.A. | Meo | 2007 | 148 | 30 | 1 | 694 (09.2011, *est.*) |
| | | Sonaecom - Serviços De Comunicaçoes, S.A. | Sonaecom | Optimus Clix | 2007 | 150 | 24 | 1 | 52 (12.2008, *est.*) |
| | | Vodafone Portugal-Comunicaçoes Pessoais, S.A. | Vodafone Group Plc | Vodafone TV | 2009 | 131 | 20 | 1 | ~ |
| **RO** | 5 | Air Bites Srl | RCS & RDS SA | Digi TV (rebrand 2010) | 2008 | 61 | | | ~ |
| | | Ines Group Srl | Ines Group | Ines IPTV | 2006 | 165 | 14 | | ~ |
| | | Romtelecom | Hellenic Telecom-munications Organisation S.A.. | Dolce TV | 2009 | 128 | 12 | 1 | 30 (12.2010) |
| **RU** | >10 | Comstar-UTS | MTS | | 2009 | | | | ~ |
| | | Multiregion | MTS | | | | | | ~ |
| | | (various companies) | Rostelecom [6] | (Domolink TV) | 2009 | 134 | 14 | | 420 (06.2011) |
| | | Corbina (Beeline TV) | Vimpelcom | Beeline TV | 2006 | 162 | 23 | | 400 (10.2011) |
| **SE** [5] | >10 | B2 Bredband Ab | Telenor | Bredbands Bolaget | 2005 | 93 | 9 | 6 | ~ |
| | | Canal Digital Sverige Ab | Telenor | Digital-TV via bredband | 2005 | 106 | 13 | 3 | 18 (03.2010) |
| | | Teliasonera Sverige Ab | TeliaSonera | Telia | 2005 | 133 | 14 | 1 | 496 (09.2011) |
| **SI** | 4 | T - 2 D.O.O. | T-2 | T-2 Televizija | 2005 | 176 | 9 | 1 | 63 (12.2010) |
| | | Telekom Slovenije D.D. | Telekom Slovenije D.D. | SiOL TV | 2003 | 190 | 17 | 3 | 120 (10.2010) |
| **SK** | 4 | Orange Slovensko, A.S. | France Telecom | Fiber TV | 2006 | 122 | 20 | 1 | 16 (12.2008) |
| | | T-Com, A.S. | Deutsche Telekom AG | MagioTV | 2007 | 102 | 8 | 2 | 150 (06.2011) [2] |
| **TR** | 1 | TTNET | Türk Telecom | Tivibu | 2011 | 116 | 2 | 1 | ~ |

1. Includes 6 operators in overseas territories.
2. Includes satellite subscribers.
3. Talktalk TV is no longer being offered to new customers. Talktalk plans a new IPTV service as part of the Youview Project (open, internet-connected television platform with the BBC, Channel 4, Channel 5, ITV plc, Arqiva, BT and TalkTalk).
4. This includes numerous free-to-air channels proposed via Canal Digitaal.
5. In addition to the four Swedish IPTV operators and distributors, several companies distribute IPTV packages in the various municipal open broadband networks (Banhof, Disatra, IPSweden, Kramnet, Serverado, Telge, Viasat etc.)
6. Rostelecom went through a process of restructuring, and taking over smaller companies in 2011. In 2012, the company plans to merge all IPTV services (e.g. "Domolink TV", "Avangard TV", "J-TV", "U-Tel TV", "Twist TV", "TVi" "Disel TV") under one brand. The subscriber figures here are the total of all packages. The package presented as an example is Domolink TV.

No IPTV operator in Malta.

Source: European Audiovisual Observatory, MAVISE database

T.5.19
G.5.9

# Number of IPTV households in Europe
## 2006-2010 In thousand.

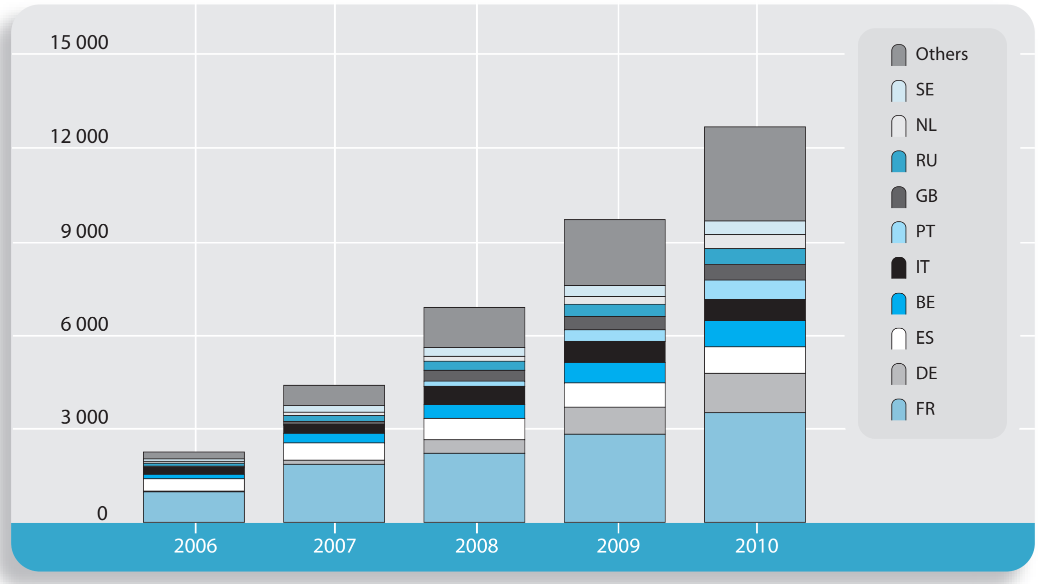
| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **AT** | 4.0 | 20.9 | 63.7 | 101.3 | 154.3 | ***52.3%*** |
| **BA** ❶ | ~ | ~ | ~ | ~ | 14.0 | ~ |
| **BE** | 139.7 | 305.3 | 441.0 | 652.0 | 839.0 | ***28.7%*** |
| **BG** | 0.6 | 0.7 | 1.4 | 4.2 | 7.5 | ***78.6%*** |
| **CH** | 10.0 | 60.0 | 120.0 | 232.7 | 424.2 | ***82.3%*** |
| **CY** | 18.0 | 39.4 | 52.0 | 62.0 | 50.0 | ***-19.4%*** |
| **CZ** | 16.1 | 84.4 | 146.6 | 171.1 | 169.9 | ***-0.7%*** |
| **DE** | 24.0 | 134.0 | 435.0 | 868.5 | 1 264.0 | ***45.5%*** |
| **DK** | 7.9 | 34.8 | 83.8 | 192.6 | 248.0 | ***28.7%*** |
| **EE** | 26.1 | 54.0 | 75.0 | 97.0 | 128.0 | ***32.0%*** |
| **ES** | 395.4 | 555.4 | 683.0 | 775.6 | 847.9 | ***9.3%*** |
| **FI** | 3.0 | 6.4 | 14.9 | 28.4 | 47.9 | ***68.9%*** |
| **FR** | 977.3 | 1 857.8 | 2 211.5 | 2 825.7 | 3 512.6 | ***24.3%*** |
| **GB** | 50.0 | 90.4 | 344.3 | 427.6 | 507.9 | ***18.8%*** |
| **GR** | 0.0 | 27.0 | 80.2 | 130.0 | 217.0 | ***66.9%*** |
| **HR** ❶ | 9.0 | 46.0 | 124.0 | 249.0 | 343.0 | ***37.8%*** |
| **HU** | 1.4 | 6.4 | 36.3 | 83.5 | 151.0 | ***80.8%*** |
| **IE** | 9.5 | 9.5 | 10.0 | 11.0 | 17.0 | ***54.5%*** |
| **IT** | 213.0 | 263.0 | 587.1 | 675.0 | 686.0 | ***1.6%*** |
| **LT** | 6.0 | 18.5 | 41.1 | 57.8 | 70.7 | ***22.3%*** |
| **LU** | 0.0 | 0.2 | 2.9 | 9.0 | 11.0 | ***22.2%*** |
| **LV** | 0.5 | 7.2 | 17.6 | 43.6 | 118.1 | ***170.9%*** |
| **MK** ❶ | 0.0 | 0.0 | 2.0 | 14.2 | 64.0 | ***352.3%*** |
| **NL** | 57.5 | 110.5 | 154.0 | 242.2 | 454.1 | ***87.5%*** |
| **NO** | 76.5 | 105.8 | 147.8 | 203.4 | 246.1 | ***21.0%*** |
| **PL** | 4.7 | 47.3 | 87.1 | 151.1 | 181.4 | ***20.1%*** |
| **PT** | 0.6 | 26.2 | 171.7 | 372.8 | 617.1 | ***65.5%*** |
| **RO** | 0.2 | 0.4 | 0.5 | 2.6 | 32.9 | ***1165.4%*** |
| **RU** ❶ | 95.3 | 189.3 | 295.0 | 397.0 | 500.0 | ***25.9%*** |
| **SE** | 81.1 | 205.8 | 276.0 | 353.8 | 430.5 | ***21.7%*** |
| **SI** | 28.6 | 71.1 | 136.5 | 179.0 | 198.6 | ***10.9%*** |
| **SK** | 0.9 | 17.0 | 50.1 | 88.9 | 117.0 | ***31.6%*** |
| **TR** | 0.0 | 0.0 | 0.0 | 2.1 | 6.0 | ***185.7%*** |
| ***EUR 27*** | ***2 066.2*** | ***3 993.4*** | ***6 203.3*** | ***8 606.2*** | ***11 079.2*** | ***28.7%*** |
| ***EUR 37*** | ***2 257.0*** | ***4 394.5*** | ***6 891.9*** | ***9 704.5*** | ***12 676.4*** | ***30.6%*** |

❶ Different sources for 2010 data for Bosnia and Herzegovina (RAK), Croatia (HAKOM), the "Former Yugoslav Republic of Macedonia" (Agency for Electronic Communications) and the Russian Federation (J'Son and Partners Consulting).

No data for Albania, Iceland, Liechtenstein.

Source : Screen Digest, European Audiovisual Observatory

In thousand.



T.5.20
G.5.10

# Consumers expenditures for IPTV audiovisual services 2006-2010

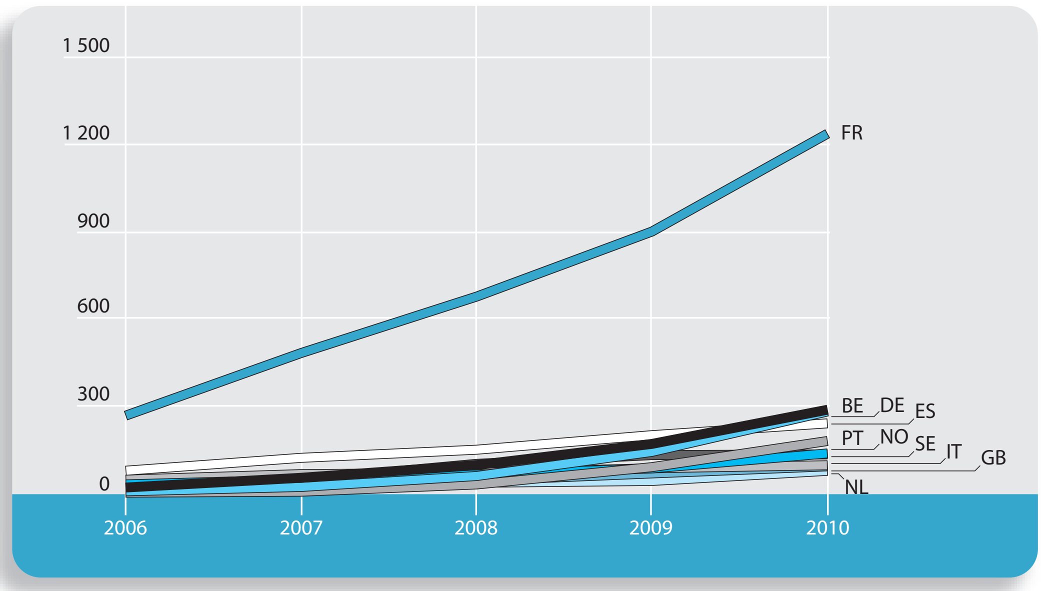
EUR million. Including VoD.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| AT | 0.5 | 2.4 | 5.0 | 10.6 | 16.6 | 57.4% |
| BE | 17.9 | 51.5 | 95.1 | 168.3 | 286.1 | 70.1% |
| BG | 0.0 | 0.0 | 0.1 | 0.1 | 0.2 | 49.0% |
| CH | 1.2 | 7.9 | 17.3 | 35.7 | 69.1 | 93.5% |
| CY | 4.2 | 9.0 | 13.6 | 16.4 | 16.6 | 1.3% |
| CZ | 2.3 | 12.6 | 33.3 | 43.8 | 48.6 | 10.9% |
| DE | 4.8 | 19.8 | 57.5 | 140.9 | 280.0 | 98.7% |
| DK | 1.2 | 5.5 | 16.3 | 44.7 | 64.5 | 44.3% |
| EE | 0.8 | 2.7 | 5.8 | 8.1 | 12.6 | 56.4% |
| ES | 75.9 | 120.3 | 148.3 | 198.4 | 239.2 | 20.6% |
| FI | 0.6 | 1.0 | 2.4 | 4.7 | 10.4 | 120.7% |
| FR | 266.1 | 482.0 | 676.6 | 901.0 | 1 238.3 | 37.4% |
| GB | 21.9 | 21.0 | 41.5 | 66.4 | 90.9 | 37.0% |
| GR | 0.0 | 3.4 | 13.7 | 27.0 | 32.7 | 21.2% |
| HR | 0.0 | 0.0 | 0.0 | 0.0 | ~ | – |
| HU | 0.1 | 0.8 | 4.0 | 10.7 | 12.0 | 12.4% |
| IE | 2.3 | 4.2 | 4.5 | 5.1 | 5.6 | 9.1% |
| IT | 45.1 | 64.1 | 68.2 | 84.3 | 94.7 | 12.4% |
| LT | 0.4 | 1.4 | 3.8 | 6.0 | 7.9 | 30.1% |
| LU | 0.0 | 0.0 | 0.3 | 1.4 | 2.7 | 90.0% |
| LV | 0.0 | 0.5 | 1.7 | 4.5 | 12.2 | 171.9% |
| MK | 0.0 | 0.0 | 0.0 | 0.0 | ~ | – |
| NL | 8.4 | 19.4 | 34.2 | 40.5 | 75.4 | 86.3% |
| NO | 28.7 | 45.0 | 62.5 | 83.7 | 135.5 | 61.9% |
| PL | 0.4 | 5.1 | 14.6 | 21.1 | 16.9 | -19.6% |
| PT | 0.1 | 3.5 | 28.4 | 88.2 | 178.2 | 102.0% |
| RO | 0.1 | 0.1 | 0.2 | 0.4 | 1.2 | 217.8% |
| RU | 0.0 | 0.0 | 0.0 | 0.0 | ~ | – |
| SE | 16.8 | 44.2 | 99.5 | 129.7 | 132.1 | 1.9% |
| SI | 0.0 | 8.1 | 13.7 | 18.7 | 23.8 | 27.4% |
| SK | 0.1 | 1.5 | 8.5 | 14.9 | 36.3 | 144.0% |
| TR | 0.0 | 0.0 | 0.0 | 0.2 | 0.0 | -75.9% |
| EUR 27 | 469.9 | 884.0 | 1 390.8 | 2 055.7 | 2 935.8 | 42.8% |
| EUR 37 | 499.7 | 936.9 | 1 470.7 | 2 175.3 | 3 140.4 | 44.4% |

No data for 2010 in Malta, Croatia, "The Former Yugoslav Republic of Macedonia" and the Russian Federation.
No data for Albania, Bosnia and Herzegovina, Iceland and Liechtenstein.

Source: Screen Digest

EUR million.



The number of mobile television subscribers in the EU was 6.3 million at the end of 2010, compared with 5.8 the previous year (T.5.21).

## Unicast transmission (3G television or EDGE)

3G television had 5.7 million subscribers in Europe at the end of 2010, representing a 25% rise in the space of a year (T.5.24). The market is led by France, with 3.48 million subscribers, with Germany and Italy, each with less than half a million, following some way behind. In more than half of the remaining countries, the number does not exceed 100,000. However, the number of telephones equipped to receive unicast TV services is continuing to rise strongly in Europe. In the EU, for example, there were more than 245 million such devices at the end of 2010. In other words, only 2.3% of the owners of telephones capable of receiving unicast mobile television actually subscribe to these services. In 2011, as in 2010, the number of 3G television services thus continued to decline and actually fell below fifty (T.5.22). Platforms ceased operating in Bulgaria, Ireland, Italy and the United Kingdom, for example. The 3G television offers vary considerably from one operator to another. Some platforms offer fewer than five channels while others offer access to more than 60 channels. Nevertheless, mobile telephony operators seem to be focusing increasingly on using their 3G networks to provide access to catalogues of videos and clips rather than linear television services.

## Broadcast transmission (DVB-H or T-DMB)

The number of subscribers to personal mobile television dropped by nearly 40% in 2010 (T.5.25) following the closure of a large number of DVB-H platforms, for example in Austria and Switzerland. With the closure of services in Finland, Hungary, Italy and the Netherlands in 2011, personal mobile television was no longer being marketed in any EU country at the beginning of 2012.

## Applications

The difficulties encountered by the mobile television markets can partly be explained by the upsurge in services, linear or on demand, available via internet applications on smartphones or tablets. For example, the Sky Go platform in the United Kingdom and Meo Go in Portugal offered linear 3G television services at the end of 2011 but now advocate the use of the Wi-Fi network.

Source: European Audiovisual Observatory

Le nombre d'abonnés à la télévision mobile dans l'Union européenne (UE) s'élève à 6,3 millions à la fin 2010, contre 5,8 un an plus tôt (T.5.21).

## Diffusion unicast (télévision 3G ou EDGE)

La télévision 3G compte 5,7 millions d'abonnés en Europe à la fin 2010, en hausse de 25 % en un an (T.5.24). Le marché est porté essentiellement par la France et ses 3,48 millions d'abonnés, suivie de loin par l'Allemagne et l'Italie, qui n'atteignent même pas le demi million d'abonnés. Dans plus de la moitié des autres pays, le nombre d'abonnés ne dépasse pas 100 000. Pourtant, le nombre de téléphones équipés pour la réception unicast de services TV continue de progresser fortement en Europe. On compte ainsi fin 2010 plus de 245 millions de terminaux équipés dans l'UE. En d'autres termes, seuls 2,3 % des appareils pouvant recevoir la télévision mobile via une diffusion unicast sont abonnés à de tels services. En 2011 comme en 2010 le nombre de plates-formes de télévision 3G a donc logiquement continué de décroître, passant sous la barre de la cinquantaine de services (T.5.22). Des plates-formes ont par exemple fermé en Bulgarie, Irlande, Italie ou au Royaume-Uni. Les offres de télévision 3G présentent de fortes disparités d'un opérateur à l'autre. Certaines plates-formes proposent moins de 5 chaînes quand d'autres offrent l'accès à plus d'une soixantaine de chaînes. Ceci étant, les opérateurs de téléphonie mobile semblent mettre de plus en plus en valeur l'accès, par leurs réseaux 3G, à des catalogues de vidéos et de clips plutôt que l'accès aux services linéaires de télévision.

## Diffusion broadcast (DVB-H ou T-DMB)

Le nombre d'abonnés à la télévision mobile personnelle a reculé en 2010 de près de 40 % (T.5.25) après que de nombreuses plates-formes DVB-H ont fermé au cours de l'année, par exemple en Autriche ou en Suisse. Avec les fermetures des services finlandais, hongrois, italien et néerlandais en 2011, la télévision mobile personnelle n'est plus commercialisée au début de l'année 2012 dans aucun pays de l'UE.

## Applications

Les difficultés rencontrées par les marchés de la télévision vers les mobiles s'expliquent en partie par l'essor de service, linéaires ou à la demande, proposés via des applications Internet sur Smartphones ou tablettes. Les plates-formes Sky Go au Royaume-Uni ou Meo Go au Portugal proposent par exemple fin 2011 des services de télévision linéaire via 3G mais préconisent désormais l'utilisation du réseau wifi.

Die Zahl der Abonnenten für mobiles Fernsehen belief sich in der EU Ende 2010 auf 6,3 Mio. gegenüber 5,8 Mio. ein Jahr zuvor (T.5.21).

## *Unicast-Verbreitung (Fernsehen über 3G oder EDGE)*

Ende 2010 gab es in Europa 5,7 Mio. Abonnenten von Fernsehdiensten über 3GNetze, ein Zuwachs um 25 % gegenüber dem Vorjahr (T.5.24). Der Markt wurde im Wesentlichen von Frankreich und seinen 3,48 Mio. Abonnenten getragen, weit vor Deutschland und Italien, die noch nicht einmal auf 500 000 Abonnenten kamen. In mehr als der Hälfte der anderen Länder blieb die Zahl der Abonnenten unter der 100 000-Marke. Dabei stieg die Anzahl der Handys, die für einen Unicast-Empfang von Fernsehdiensten ausgestattet sind, in Europa weiterhin stark an. So gab es Ende 2010 über 245 Mio. entsprechend ausgerüstete Empfangsgeräte in der EU. Mit anderen Worten, bei gerade mal 2,3 % der Geräte, die über eine Unicast-Verbreitung mobiles Fernsehen empfangen konnten, bestand ein Abonnement für diese Dienste. Logischerweise sank 2011 die Zahl der 3G-TV-Plattformen wie 2010 weiter und fiel unter die Schwelle von 50 Diensten (T.5.22). So wurden etwa Plattformen in Bulgarien, Irland, Italien und im Vereinigten Königreich geschlossen. Das Fernsehangebot in 3GNetzen weist erhebliche Unterschiede von einem Betreiber zum anderen auf. Manche Plattformen bieten weniger als fünf Kanäle an, während andere über 60 Kanäle im Programm haben. Davon abgesehen, scheinen sich die Mobilfunkbetreiber zunehmend darauf zu konzentrieren, über ihre 3GNetze statt lineare Fernsehdienste einen Zugang zu Sammlungen von Videos und Clips anzubieten.

## *Broadcast-Verbreitung (DVB-H oder T-DMB)*

Die Zahl der Abonnenten für diese Art des mobilen Fernsehens ist 2010 um fast 40 % zurückgegangen (T.5.25), nachdem im Laufe des Jahres zahlreiche DVB-H-Plattformen ihren Betrieb einstellten, etwa in Österreich und in der Schweiz. Mit der Schließung der Dienste in Finnland, Italien, den Niederlanden und Ungarn 2011 wurde Anfang 2012 in keinem Land der EU mehr mobiles Fernsehen für den Broadcast-Empfang kommerziell angeboten.

## *Anwendungen (Apps)*

Die Schwierigkeiten der Fernsehmärkte im Hinblick auf mobile Empfangsgeräte erklären sich teilweise mit dem Boom von linearen oder Abrufdiensten, die über Internet-Anwendungen auf Smartphones oder Tablets angeboten werden. Die Plattformen Sky Go im Vereinigten Königreich oder Meo Go in Portugal boten beispielsweise Ende 2011 lineare Fernsehdienste via 3G an, empfahlen aber, diese künftig über WLAN zu nutzen.

T.5.21
G.5.11

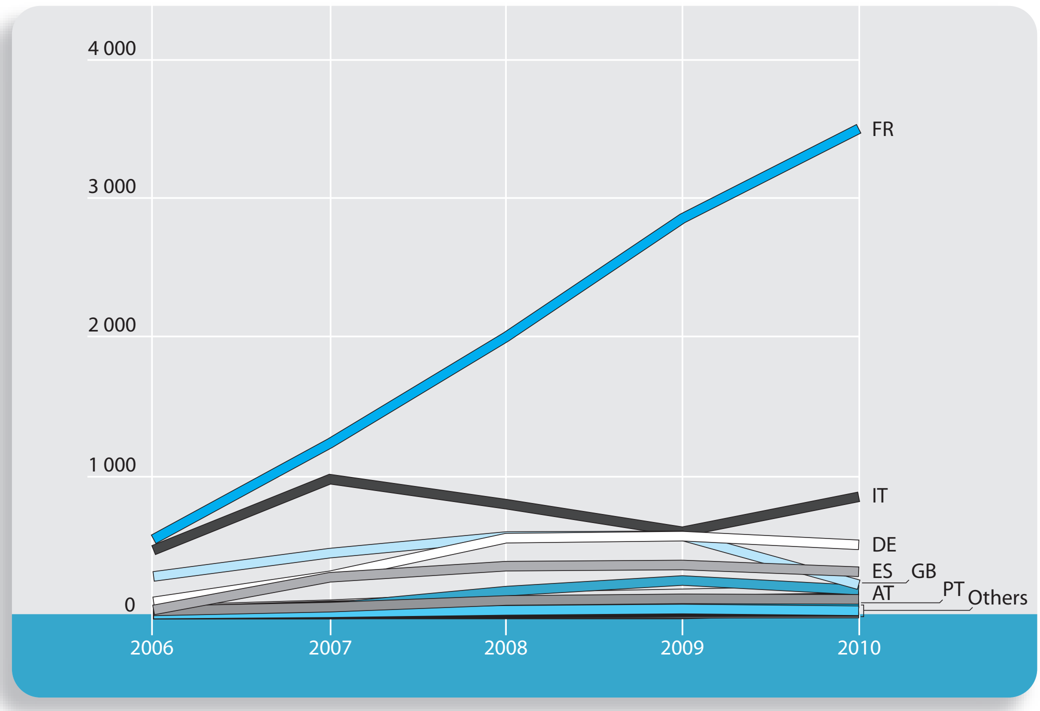
# Total mobile TV subscribers in Europe [1]
## 2006-2010 In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| AT | 5.1 | 46.3 | 165.3 | 242.2 | 173.5 | -28.4% |
| BE | 0.0 | 3.8 | 10.3 | 16.2 | 18.5 | 14.4% |
| CH | 22.4 | 49.3 | 97.9 | 109.7 | 105.7 | -3.6% |
| CZ | 0.0 | 9.5 | 26.4 | 36.0 | 23.6 | -34.6% |
| DE | 87.7 | 275.6 | 548.1 | 562.6 | 499.9 | -11.1% |
| DK | 15.3 | 32.1 | 38.2 | 43.2 | 42.9 | -0.7% |
| ES | 29.5 | 265.4 | 345.7 | 354.3 | 305.6 | -13.7% |
| FI | 1.9 | 17.9 | 46.3 | 64.1 | 44.1 | -31.1% |
| FR | 540.2 | 1 233.7 | 2 002.9 | 2 858.9 | 3 506.9 | 22.7% |
| GB | 271.7 | 440.0 | 559.8 | 565.2 | 211.7 | -62.5% |
| GR | 10.2 | 27.0 | 57.8 | 63.4 | 49.2 | -22.3% |
| HU | 0.0 | 0.0 | 26.6 | 43.1 | 79.3 | 84.2% |
| IE | 0.0 | 0.0 | 7.5 | 15.5 | 28.1 | 81.5% |
| IT | 461.8 | 974.4 | 793.8 | 594.4 | 846.8 | 42.5% |
| NL | 0.0 | 18.9 | 75.4 | 73.8 | 79.7 | 7.9% |
| NO | 2.4 | 10.0 | 18.1 | 23.7 | 27.9 | 17.6% |
| PL | 18.8 | 59.1 | 91.4 | 99.1 | 118.3 | 19.4% |
| PT | 29.5 | 67.0 | 121.7 | 145.7 | 172.1 | 18.1% |
| SE | 0.1 | 13.5 | 21.2 | 56.3 | 83.2 | 47.8% |
| SI | 0.0 | 3.0 | 5.2 | 5.8 | 6.9 | 18.4% |
| SK | 0.0 | 0.0 | 0.0 | 0.0 | 32.0 | – |
| *EUR 27* | *1 471.6* | *3 487.2* | *4 943.5* | *5 839.9* | *6 322.3* | *8.3%* |

[1] Mobile TV: includes "linear" television programming, as defined by the EU in the AVMS Directive. An audiovisual media service where a media service provider decides upon the moment in time when a specific programme is transmitted and establishes the programme schedule. Note that the definition applies regardless of whether broadcast or unicast delivery mechanisms are used.

No data on Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta and Romania.

In thousand.




Source: Screen Digest, European Audiovisual Observatory

T.5.22

## Operators of distribution platform of unicast TV services to mobile in Europe
## December 2011

| Country | Company | Group | Name of the service | Number of TV channels |
|---|---|---|---|---|
| AT | Hutchinson 3G Austria | Hutchison Whampoa Limited | Planet 3 Mobile TV | 47 |
| | T-Mobile Austria GmbH | Deutsche Telekom | Mobile TV | 19 |
| BA | BH Telecom | | Mobile TV | ~ |
| BE | Mobistar | France Télécom | Mobistar Mobile TV | 27 |
| BG | Cosmo Bulgaria Mobile Ead | OTE / Deutsche Telekom | Globul Live TV | 5 |
| CH | Sunrise Communications AG | | Sunrise Live Mobile TV | 50 |
| | Swisscom SA | Swisscom | Swisscom TV air | 63 |
| DE | Vodafone D2 GmbH | Vodafone | Vodafone Mobile TV | 24 |
| | T-Mobile Deutschland GmbH | Deutsche Telekom | Mobile TV | 23 |
| DK | Hi3G Denmark Aps | Hutchison Whampoa Limited | Mobil TV | 26 |
| | TDC A/S | TDC | TDC Mobil TV | 8 |
| | Telenor A/S | Telenor | Mobil TV | 11 |
| EE | EMT AS | TeliaSonera | Mobile TV | 4 |
| ES | France Telecom España SA | France Télécom | Orange TV móvil/ DIGITAL+ móvil | 56 |
| | Telefonica de España SA | Telefonica | TV en el Movil | 79 |
| | Vodafone España SA | Vodafone | Vodafone TV/ DIGITAL+ móvil | 36 |
| FR | Bouygues Telecom SA | Bouygues | TV3G+ / Canal+ Mobile / CanalSat Mobile | 60 |
| | France Télécom SA | France Télécom | TV Max | 70 |
| | SFR SA | Vivendi | Pass TV Mobile / Pass Canalsat Mobile / Pass Canal+ Mobile | 55 |
| GB | Everything Everywhere Limited | France Télécom / Deutsche Telekom | Mobile TV from Orange [1] | 28 |
| | British Sky Broadcasting Ltd | News Corporation | Sky Go [2] | 39 |
| | Vodafone Ltd | Vodafone | Vodafone TV | 20 |
| GR | Vodafone - Panafon Hellenic Telecommunications Company S.A. | Vodafone | TV & Video | 11 |
| | Wind Hellas Telecommunications S.A. | Wind Telecomunicazioni | Wind Plus TV | 4 |
| HR | Vipnet D.O.O. | Telekom Austria | Vodafone Live! 3G TV | 6 |
| HU | Magyar Telekom "T-Home Tv" | Deutsche Telekom | Mobil TV | 23 |
| | Vodafone Hungary Ltd. | Vodafone | Mobil TV | 7 |
| IE | Hutchison 3G Ireland Limited | Hutchison Whampoa | Mobile TV | 8 |
| IT | H3g Spa | Hutchison Whampoa | La 3TV | 9 |
| | Telecom Italia Spa | Telecom Italia | Canali TV / Live TV di Sky | 11 |
| LU | Entreprise des P&T | | LUXGSM Mobile TV | 7 |
| | Orange SA | France Télécom | Orange Mobile TV | 11 |
| LV | Latvijas Mobilais Telefons Sia | TeliaSonera | Mobilā TV | 9 |
| MK | One | Telekom Slovenije | Live TV | 3 |
| MT | Go P.L.C. | | Go Mobile / MTV Mobile | 24 |
| NL | Vodafone Libertel B.V. | Vodafone | Vodafone TV | 11 |
| NO | Telenor ASA | Telenor | Mobil-TV | 16 |
| PL | Centertel Sp. Z O.O. | France Télécom | Mobilna Telewizja | 31 |
| | Polska Telefonia Cyfrowa Sp. Z O.O. | Deutsche Telekom | TV & Video | 6 |
| PT | Tmn - Telecomunicaçoes Moveis Nacionais S.A. (Tmn) | Portugal Telecom | Meo Go [3] | 39 |
| | Vodafone Portugal-Comunicaçoes Pessoais, S.A. | Vodafone | Mobile TV | 30 |
| RO | Orange Romania Sa | France Télécom | Orange TV Live | 16 |
| | Vodafone Romania Sa | Vodafone | Vodafone Live! TV Mobil | 19 |
| SE | Hi3g Access Ab | Hutchison Whampoa | 3Mobil-TV | 19 |
| | Tele2 Syd Ab | Tele2 | Tele2 TV i Mobilen | 22 |
| SI | Mobitel, Telekomunikacijske Storitve, D.D. | Telekom Slovenije | Mobilna TV | 10 |
| TR | Avea İletişim Hizmetleri A.Ş | Turk Telekom | AVEA MobilVizyon | 14 |
| | Turkcell | | Turkcell Mobil TV | 23 |
| | Vodafone Türkiye | Vodafone | Vodafone Mobil TV | 26 |

Source: European Audiovisual Observatory, MAVISE database

[1] Formerly Orange UK and T-Mobile UK, merged in 2010

[2] Sky Go, formerly known as Sky Mobile. 3G is just one form of distribution, also available for smart phones, iPads, etc. In fact wifi is recommended rather than 3G.

[3] Meo Go, formerly known as Meo Mobile TV. 3G is just one form of distribution, also available for smart phones, iPads, etc.

Several 3G packages have been cancelled in 2011 (for instance Mobitel Bulgaria, O2 TV Ireland, Add TV UK, MTN Live TV Cyprus, Vodafone Italia, Omnitel Mobilii TV in Lithuania)
No mobile phone packagers in Albania, Cyprus, the Czech Republic, Finland, Iceland, Liechtenstein or the Slovak Republic.
Russian Federation not included.

T.5.23
G.5.12

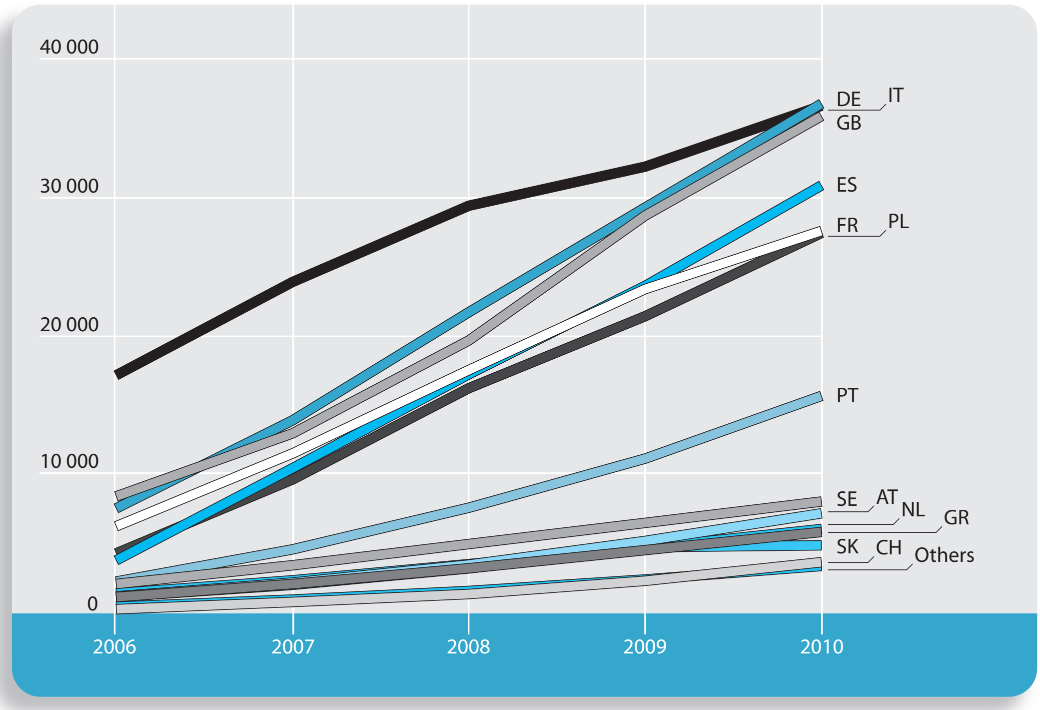
## Number of mobile unicast TV receivers in Europe [1]
## 2006-2010 In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **AT** | 1 442.3 | 2 377.1 | 3 547.8 | 4 731.3 | 6 081.1 | ***28.5%*** |
| **BE** | 231.0 | 611.5 | 1 249.0 | 1 918.6 | 2 851.4 | ***48.6%*** |
| **CH** | 471.8 | 986.0 | 1 609.2 | 2 437.5 | 3 412.9 | ***40.0%*** |
| **CZ** | 109.2 | 319.5 | 590.2 | 927.5 | 1 460.2 | ***57.4%*** |
| **DE** | 7 576.3 | 13 930.8 | 21 741.6 | 29 295.8 | 36 792.8 | ***25.6%*** |
| **DK** | 328.8 | 671.1 | 1 115.3 | 1 712.0 | 2 667.6 | ***55.8%*** |
| **ES** | 3 825.0 | 10 476.0 | 17 257.0 | 23 641.8 | 30 890.5 | ***30.7%*** |
| **FI** | 364.8 | 779.6 | 1 379.4 | 1 976.2 | 2 886.2 | ***46.0%*** |
| **FR** | 6 281.0 | 11 539.0 | 17 563.0 | 23 412.0 | 27 606.8 | ***17.9%*** |
| **GB** | 8 442.9 | 12 991.0 | 19 701.5 | 28 713.6 | 35 898.4 | ***25.0%*** |
| **GR** | 1 187.7 | 2 050.5 | 3 240.7 | 4 769.4 | 4 905.8 | ***2.9%*** |
| **HU** | 73.9 | 270.3 | 494.0 | 933.0 | 1 306.9 | ***40.1%*** |
| **IE** | 723.7 | 1 180.8 | 1 664.2 | 2 218.2 | 2 610.9 | ***17.7%*** |
| **IT** | 17 191.4 | 23 924.3 | 29 430.0 | 32 252.2 | 36 649.2 | ***13.6%*** |
| **NL** | 1 170.2 | 2 113.2 | 3 247.4 | 4 557.1 | 5 868.5 | ***28.8%*** |
| **NO** | 356.5 | 574.0 | 822.6 | 1 084.6 | 1 384.1 | ***27.6%*** |
| **PL** | 4 330.6 | 9 662.0 | 16 253.2 | 21 448.9 | 27 457.4 | ***28.0%*** |
| **PT** | 2 116.4 | 3 464.5 | 4 998.0 | 6 524.3 | 8 067.1 | ***23.6%*** |
| **SE** | 1 216.2 | 2 213.0 | 3 504.3 | 5 219.8 | 7 213.1 | ***38.2%*** |
| **SI** | 100.3 | 206.0 | 305.6 | 396.6 | 527.0 | ***32.9%*** |
| **SK** | 291.0 | 812.5 | 1 384.5 | 2 341.3 | 3 685.1 | ***57.4%*** |
| ***EUR 27*** | ***57 002.8*** | ***99 592.5*** | ***148 666.8*** | ***196 989.8*** | ***245 425.9*** | ***24.6%*** |

[1] Screen Digest uses the term unicast to mean a one-to-one data connection for delivery of mobile audiovisual content. Mobile TV services delivered over either a 2G or 3G network are considered unicast.

No data on Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta and Romania.

In thousand.




Source: Screen Digest, European Audiovisual Observatory

T.5.24
G.5.13

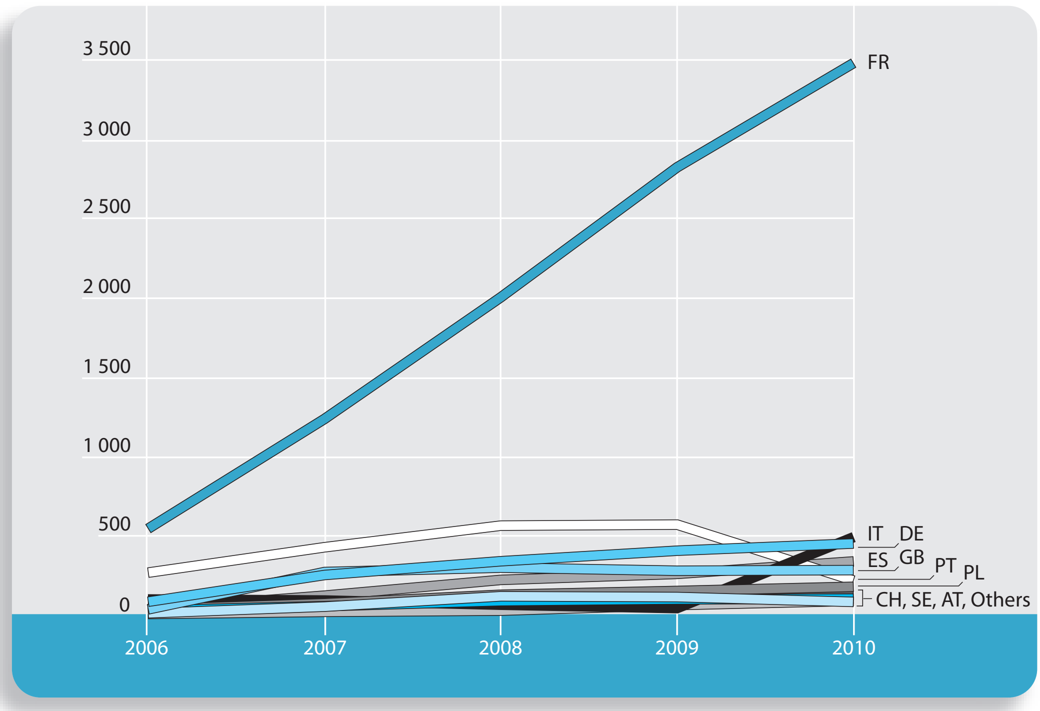
## Number of subscribers to mobile unicast TV services in Europe [1]
## 2006-2010 In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **AT** | 5.1 | 46.3 | 111.7 | 107.2 | 76.5 | ***-28.7%*** |
| **BE** | 0.0 | 3.8 | 10.3 | 16.2 | 18.5 | ***14.4%*** |
| **CH** | 22.4 | 49.3 | 81.8 | 92.3 | 97.0 | ***5.0%*** |
| **CZ** | 0.0 | 9.5 | 13.2 | 15.9 | 16.8 | ***5.6%*** |
| **DE** | 77.7 | 246.5 | 333.6 | 400.2 | 445.5 | ***11.3%*** |
| **DK** | 15.3 | 32.1 | 38.2 | 43.2 | 42.9 | ***-0.7%*** |
| **ES** | 29.5 | 265.4 | 293.2 | 273.5 | 277.5 | ***1.5%*** |
| **FI** | 1.9 | 11.8 | 25.7 | 25.1 | 18.0 | ***-28.2%*** |
| **FR** | 540.2 | 1 233.7 | 2 002.9 | 2 824.6 | 3 483.2 | ***23.3%*** |
| **GB** | 261.7 | 422.0 | 558.7 | 565.2 | 211.7 | ***-62.5%*** |
| **GR** | 10.2 | 27.0 | 57.8 | 63.4 | 49.2 | ***-22.3%*** |
| **HU** | 0.0 | 0.0 | 3.3 | 9.1 | 45.3 | ***400.0%*** |
| **IE** | 0.0 | 0.0 | 7.5 | 15.5 | 28.1 | ***81.5%*** |
| **IT** | 92.1 | 85.6 | 58.3 | 36.9 | 485.1 | ***1 215.6%*** |
| **NL** | 0.0 | 18.9 | 36.3 | 35.7 | 46.6 | ***30.5%*** |
| **NO** | 2.4 | 10.0 | 18.1 | 23.7 | 27.9 | ***17.6%*** |
| **PL** | 18.8 | 59.1 | 91.4 | 99.1 | 118.3 | ***19.4%*** |
| **PT** | 29.5 | 67.0 | 121.7 | 145.7 | 172.1 | ***18.1%*** |
| **SE** | 0.1 | 13.5 | 21.2 | 56.3 | 83.2 | ***47.8%*** |
| **SI** | 0.0 | 3.0 | 5.2 | 5.8 | 6.9 | ***18.4%*** |
| **SK** | 0.0 | 0.0 | 0.0 | 0.0 | 32.0 | – |
| ***EUR 27*** | ***1 082.0*** | ***2 545.1*** | ***3 790.2*** | ***4 738.7*** | ***5 657.5*** | ***25.0%*** |

[1] Screen Digest uses the term unicast to mean a one-to-one data connection for delivery of mobile audiovisual content. Mobile TV services delivered over either a 2G or 3G network are considered unicast.

No data on Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta and Romania.

In thousand.




Source: Screen Digest, European Audiovisual Observatory

T.5.25
G.5.14

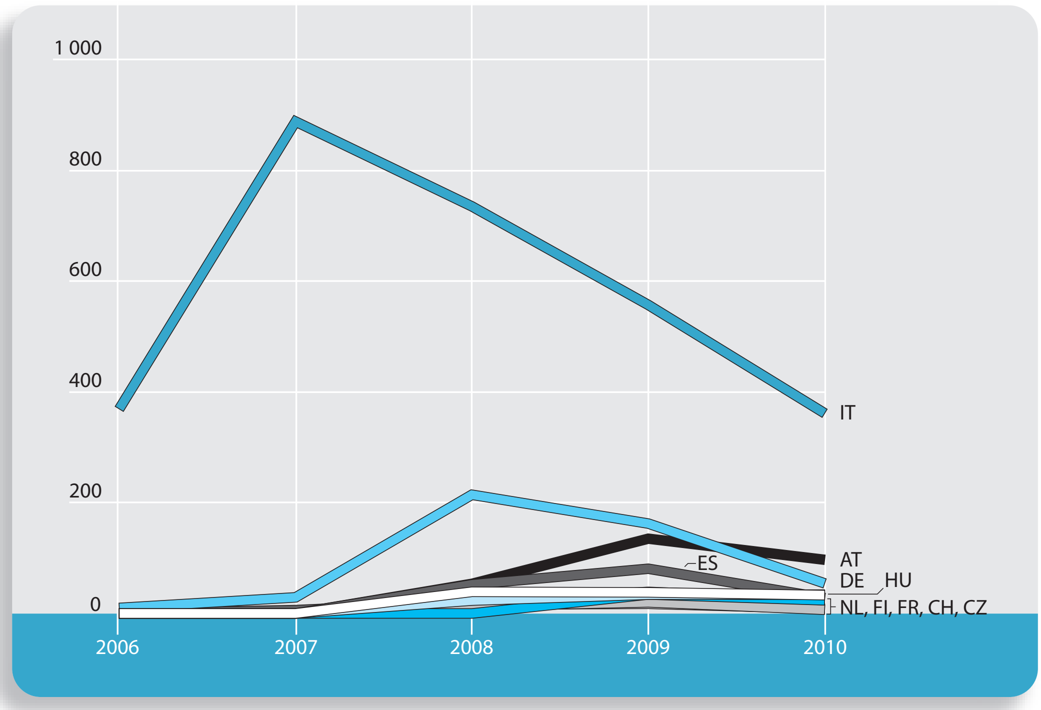
# Number of subscribers to mobile broadcast TV services in Europe [1]

## 2006-2010 In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| AT [3] | 0.0 | 0.0 | 53.6 | 135.1 | 97.0 | -28.2% |
| BE | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| CH [3] | 0.0 | 0.0 | 16.1 | 17.4 | 8.7 | -49.7% |
| CZ | 0.0 | 0.0 | 13.1 | 20.1 | 6.7 | -66.5% |
| DE [2] | 10.0 | 29.1 | 214.5 | 162.4 | 54.4 | -66.5% |
| DK | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| ES | 0.0 | 0.0 | 52.5 | 80.8 | 28.0 | -65.3% |
| FI [4] | 0.0 | 6.1 | 20.6 | 39.0 | 26.1 | -33.0% |
| FR | 0.0 | 0.0 | 0.0 | 34.2 | 23.7 | -30.7% |
| GB | 9.9 | 18.0 | 1.0 | 0.0 | 0.0 | – |
| GR | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| HU [4] | 0.0 | 0.0 | 23.3 | 34.0 | 34.0 | -0.1% |
| IE | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| IT [4] | 369.6 | 888.8 | 735.5 | 557.5 | 361.7 | -35.1% |
| NL [4] | 0.0 | 0.0 | 39.1 | 38.1 | 33.1 | -13.2% |
| NO | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| PL | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| PT | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| SE | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| SI | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| SK | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| *EUR 27* | *389.6* | *942.0* | *1 153.3* | *1 101.2* | *664.8* | *-39.6%* |

[1] Broadcast services are 'one to many' communications networks. For mobile TV, this includes technologies such as DVB-T, DVB-H, T-DMB, S-DMB, ISDB-T, and DAB-IP.
[2] Mobile broadcast TV services closed in 2009.
[3] Mobile broadcast TV services closed in 2010.
[4] Mobile broadcast TV services closed in 2011.
No data on Bulgaria, Cyprus, Estonia, Latvia, Lithuania, Luxembourg, Malta and Romania.

In thousand.




Source: Screen Digest, European Audiovisual Observatory

# Broadband networks

Access to broadband Internet is considered essential in reducing the "digital divide" and allowing access for as many citizens as possible to the information and services available over the Internet. For television services, broadband access is essential for IPTV services, video on demand and catch-up TV services etc. The emergence of "connected TV", whereby Internet content, websites and audiovisual content may be accessed via the television set, also requires broadband access. The rate of development around Europe relies on the development of infrastructure by private operators, or the intervention of the state to improve access. In October 2011, the European Union announced its intention to invest almost €9.2 billion in broadband access.

Broadband access is gradually growing throughout Europe. For example, at the end of 2009, there were seven countries where one third or less of households had access to broadband Internet (Bulgaria, Greece, Lithuania, Poland, Romania, the Slovak Republic, and Turkey). At the end of 2010, only Bulgaria and Turkey had less than one third of households with broadband access. Two thirds or more of households in Switzerland, Iceland, Luxembourg, Norway, the Netherlands, the United Kingdom, Malta and Sweden had this service at the end of 2010 (see G.5.15). The data also shows that in many countries (including those with low levels of Internet access) almost all Internet households are broadband: Turkey, Greece, Italy, and also Lithuania, France, Malta, Cyprus and the UK.

At the end of 2010, 77% of broadband households in the EU accessed this service over DSL platforms, while just 17% accessed broadband over cable (see G.5.17). However, cable delivers broadband to around 30% of broadband homes in Austria, Switzerland, and Poland, to 40% in the Netherlands and Portugal, and to around half of all broadband homes in Belgium, Hungary, Malta, and Romania (table T.5.28).

Since DSL is the most important delivery platform, the top ten broadband network operators in Europe are mainly telecommunications operators (aside from Virgin Media and Liberty Global cable services) with Deutsche Telekom and France Telecom being the leading operators in Europe (table T.5.29). Many telecommunications companies provide broadband directly or via subsidiaries in several European countries (Deutsche Telekom, France Telecom, Telefonica, and Vodafone). The cable (and DSL) operator Liberty Global offers broadband services in ten European countries, where it has significant share of the cable market.

# Réseaux large bande

L'accès à internet large bande est considéré comme essentiel pour réduire la « fracture numérique » et permettre au plus grand nombre possible de citoyens d'accéder aux informations et services disponibles sur Internet. Pour la télévision, l'accès large bande est notamment indispensable aux services IPTV, de vidéo à la demande et de télévision de rattrapage. L'émergence de la « télévision connectée », qui permet d'accéder à du contenu internet, des sites web et du contenu audiovisuel via un téléviseur, requiert également un accès large bande. Sa vitesse de déploiement en Europe s'appuie sur le développement d'infrastructures par des opérateurs privés ou sur l'intervention de l'État pour améliorer l'accès. En octobre 2011, l'Union européenne a annoncé son intention d'investir près de 9,2 milliards EUR dans l'accès large bande.

L'accès large bande augmente progressivement dans toute l'Europe. Ainsi, fin 2009, dans 7 pays, un tiers ou moins des foyers avait accès à internet large bande (Bulgarie, Grèce, Lituanie, Pologne, Roumanie, République slovaque et Turquie). Fin 2010, seules la Bulgarie et la Turquie comptaient moins d'un tiers de foyers reliés à un réseau large bande. Les deux tiers et plus des foyers de Suisse, d'Islande, du Luxembourg, de Norvège, des Pays-Bas, du Royaume-Uni, de Malte et de Suède accédaient à ce service fin 2010 (voir G.5.15). Les données montrent également que dans de nombreux pays (y compris ceux à faible taux d'accès à internet) presque tous les foyers connectés le sont via un réseau large bande : Turquie, Grèce, Italie et aussi Lituanie, France, Malte, Chypre et Royaume-Uni.

Fin 2010, 77 % des foyers large bande de l'UE accédaient à ce service par des plates-formes DSL et seulement 17 % par le câble (voir G.5.17). Toutefois, le câble est utilisé dans environ 30 % des foyers large bande d'Autriche, de Suisse et de Pologne, dans 40 % des foyers des Pays-Bas et du Portugal, et dans environ 50 % des foyers large bande de Belgique, de Hongrie, de Malte et de Roumanie (tableau T.5.28).

Le DSL étant la principale plate-forme de diffusion, les dix principaux opérateurs de réseaux large bande en Europe sont essentiellement des opérateurs de télécommunications (excepté les câblo-opérateurs Virgin Media et Liberty Global), Deutsche Telekom et France Télécom occupant les premières places européennes (tableau T.5.29). De nombreuses sociétés de télécommunications proposent des services large bande, directement ou par l'intermédiaire de filiales, dans plusieurs pays européens (Deutsche Telekom, France Télécom, Telefonica et Vodafone). Liberty Global (opérateur DSL et câble) est ainsi présente dans dix pays européens, où elle contrôle une part significative du marché du câble.

# *Breitband-Netzwerke*

Der Zugang zum Breitband-Internet gilt als entscheidender Faktor für die Verringerung der „digitalen Kluft" und die Öffnung des Zugangs zu Informationen und Dienstleistungen über das Internet für so viele Menschen wie möglich. Für das Fernsehen ist der Breitbandzugang eine zwingende Voraussetzung für IPTV, Video-on-Demand oder auch Catch-up-TV. Auch die Weiterentwicklung des vernetzten Fernsehens (Connected TV), das den Zugang zu Internetseiten und audiovisuellen Inhalten über den Fernseher ermöglicht, erfordert einen Breitbandzugang. Wie schnell sich dieser in Europa entwickeln wird, hängt vom Ausbau der Infrastruktur durch private Betreiber oder von Maßnahmen des Staates zur Verbesserung des Zugangs ab. Die EU hat im Oktober 2011 angekündigt, knapp EUR 2,9 Mrd. in Breitbandnetze investieren zu wollen.

Der Breitbandzugang wird überall in Europa ausgebaut. So gab es Ende 2009 noch sieben Länder, in denen nur ein Drittel der Haushalte oder weniger über einen Breitband-Internetzugang verfügte (Bulgarien, Griechenland, Litauen, Polen, Rumänien, Slowakei und Türkei). Ende 2010 lag die Quote der Breitbandanschlüsse nur in Bulgarien und der Türkei noch bei unter einem Drittel der Haushalte. Zum gleichen Zeitpunkt hatten in der Schweiz, Island, Luxemburg, Norwegen, den Niederlanden, Großbritannien, Malta und Schweden zwei Drittel der Haushalte oder mehr einen Breitbandzugang zum Internet (siehe G.5.15). Aus den Daten geht auch hervor, dass in vielen Ländern (auch in jenen mit einer niedrigen Verbreitung des Internets) fast alle Internethaushalte über einen Breitbandanschluss verfügen: Türkei, Griechenland, Italien wie auch Litauen, Frankreich, Malta, Zypern und Großbritannien.

Ende 2010 nutzten 77 % der Haushalte in der EU Breitband-Internet über DSL und nur 17 % über Kabel (siehe G.5.17). Allerdings werden in Österreich, der Schweiz und Polen ca. 30 %, in den Niederlande und Portugal ca. 40 % und in Belgien, Ungarn, Malta und Rumänien rund die Hälfte der Breitbandhaushalte über Kabel versorgt (Tabelle T.5.28).

Angesichts der Bedeutung von DSL als Zugangsplattform ist es nicht verwunderlich, dass die zehn größten Breitbandnetzbetreiber in Europa überwiegend TelekomBetreiber sind (neben den Kabelnetzbetreibern Virgin Media und Liberty Global). Die zwei führenden Betreiber in Europa sind die Deutsche Telekom und France Telecom (Tabelle T.5.29). Viele Telekommunikationsunternehmen bieten Breitbanddienste direkt oder über Tochtergesellschaften in mehreren Ländern Europas an (Deutsche Telekom, France Telecom, Telefonica und Vodafone). Der Kabelnetzbetreiber (und DSL-Anbieter) Liberty Global bietet Breitbanddienste in zehn Ländern Europas an, in denen er zu den jeweils führenden Kabelanbietern zählt.

Source: European Audiovisual Observatory

T.5.26

## Broadband and narrowband households 2006-2010

In thousand.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|
| **AT** | **Online** | **2 035.6** | **2 362.9** | **2 490.2** | **2 609.5** | **2 719.6** | *4.2%* |
| | Broadband | 1 181.4 | 1 432.3 | 1 632.1 | 1 773.3 | 1 927.4 | *8.7%* |
| | Narrowband | 854.2 | 930.6 | 858.1 | 836.1 | 792.2 | *-5.3%* |
| **BE** | **Online** | **2 576.5** | **2 851.6** | **3 035.0** | **3 197.5** | **3 342.2** | *4.5%* |
| | Broadband | 1 978.5 | 2 272.1 | 2 565.6 | 2 822.1 | 2 943.7 | *4.3%* |
| | Narrowband | 598.0 | 579.5 | 469.4 | 375.4 | 398.5 | *6.2%* |
| **BG** | **Online** | **574.7** | **712.4** | **881.8** | **1 036.1** | **1 175.9** | *13.5%* |
| | Broadband | 330.1 | 507.2 | 670.0 | 810.3 | 911.6 | *12.5%* |
| | Narrowband | 244.6 | 205.2 | 211.8 | 225.8 | 264.3 | *17.1%* |
| **CH** | **Online** | **2 388.5** | **2 516.3** | **2 639.5** | **2 750.9** | **2 825.9** | *2.7%* |
| | Broadband | 1 764.1 | 2 012.5 | 2 184.4 | 2 345.4 | 2 476.0 | *5.6%* |
| | Narrowband | 624.5 | 503.7 | 455.1 | 405.5 | 349.9 | *-13.7%* |
| **CY** | **Online** | **111.4** | **116.0** | **134.6** | **158.4** | **180.0** | *13.6%* |
| | Broadband | 58.0 | 89.6 | 120.7 | 148.7 | 173.2 | *16.5%* |
| | Narrowband | 53.4 | 26.4 | 13.9 | 9.8 | 6.7 | *-31.3%* |
| **CZ** | **Online** | **1 226.3** | **1 569.0** | **1 980.5** | **2 333.9** | **2 795.6** | *19.8%* |
| | Broadband | 875.0 | 1 146.4 | 1 505.7 | 1 736.6 | 1 921.1 | *10.6%* |
| | Narrowband | 351.3 | 422.6 | 474.9 | 597.2 | 874.4 | *46.4%* |
| **DE** | **Online** | **25 297.3** | **26 492.0** | **27 622.0** | **28 548.5** | **29 441.1** | *3.1%* |
| | Broadband | 12 139.8 | 16 312.1 | 19 547.8 | 21 527.9 | 22 796.9 | *5.9%* |
| | Narrowband | 13 157.6 | 10 179.9 | 8 074.2 | 7 020.6 | 6 644.2 | *-5.4%* |
| **DK** | **Online** | **2 118.1** | **2 161.9** | **2 193.7** | **2 215.0** | **2 233.5** | *0.8%* |
| | Broadband | 1 461.6 | 1 667.8 | 1 744.4 | 1 783.6 | 1 818.2 | *1.9%* |
| | Narrowband | 656.4 | 494.1 | 449.3 | 431.4 | 415.3 | *-3.7%* |
| **EE** | **Online** | **274.3** | **330.9** | **362.1** | **381.1** | **402.5** | *5.6%* |
| | Broadband | 204.5 | 253.1 | 276.9 | 323.2 | 349.7 | *8.2%* |
| | Narrowband | 69.8 | 77.8 | 85.2 | 57.9 | 52.9 | *-8.7%* |
| **ES** | **Online** | **6 327.1** | **7 318.7** | **8 197.2** | **8 783.1** | **9 352.0** | *6.5%* |
| | Broadband | 5 263.9 | 6 295.2 | 7 151.6 | 7 709.3 | 8 352.6 | *8.3%* |
| | Narrowband | 1 063.1 | 1 023.4 | 1 045.6 | 1 073.7 | 999.4 | *-6.9%* |
| **FI** | **Online** | **1 597.0** | **1 715.6** | **1 781.2** | **1 808.9** | **1 823.1** | *0.8%* |
| | Broadband | 1 173.2 | 1 354.2 | 1 391.5 | 1 393.0 | 1 400.6 | *0.5%* |
| | Narrowband | 423.8 | 361.4 | 389.7 | 415.9 | 422.5 | *1.6%* |
| **FR** | **Online** | **11 391.3** | **13 228.2** | **14 557.8** | **15 755.2** | **16 763.5** | *6.4%* |
| | Broadband | 9 466.3 | 12 215.3 | 14 060.2 | 15 520.0 | 16 699.3 | *7.6%* |
| | Narrowband | 1 925.1 | 1 012.9 | 497.6 | 235.3 | 64.2 | *-72.7%* |
| **GB** | **Online** | **15 626.4** | **16 659.8** | **17 652.8** | **18 488.1** | **19 273.6** | *4.2%* |
| | Broadband | 11 583.4 | 14 075.9 | 15 837.0 | 16 697.4 | 17 855.0 | *6.9%* |
| | Narrowband | 4 043.0 | 2 583.9 | 1 815.8 | 1 790.7 | 1 418.5 | *-20.8%* |
| **GR** | **Online** | **1 459.1** | **1 764.7** | **1 955.8** | **2 128.7** | **2 282.2** | *13.7%* |
| | Broadband | 958.9 | 1 295.0 | 1 546.8 | 1 767.1 | 1 924.9 | *16.5%* |
| | Narrowband | 500.1 | 469.7 | 409.0 | 361.6 | 357.3 | *-23.7%* |
| **HU** | **Online** | **821.2** | **935.9** | **1 021.7** | **1 091.2** | **1 122.8** | *7.2%* |
| | Broadband | 387.5 | 587.5 | 700.7 | 800.3 | 863.4 | *8.9%* |
| | Narrowband | 433.8 | 348.4 | 321.0 | 290.9 | 259.5 | *-1.2%* |
| **IE** | **Online** | **821.2** | **935.9** | **1 021.7** | **1 091.2** | **1 122.8** | *2.9%* |
| | Broadband | 387.5 | 587.5 | 700.7 | 800.3 | 863.4 | *7.9%* |
| | Narrowband | 433.8 | 348.4 | 321.0 | 290.9 | 259.5 | *-10.8%* |
| **IS** | **Online** | **92.8** | **97.9** | **103.5** | **108.4** | **113.7** | *4.9%* |
| | Broadband | 78.8 | 88.0 | 93.3 | 95.6 | 97.9 | *2.4%* |
| | Narrowband | 14.0 | 9.9 | 10.1 | 12.8 | 15.8 | *23.6%* |
| **IT** | **Online** | **8 814.0** | **9 653.4** | **10 489.0** | **11 313.8** | **12 045.7** | *6.5%* |
| | Broadband | 7 059.1 | 8 470.4 | 9 639.1 | 10 814.4 | 11 579.7 | *7.1%* |
| | Narrowband | 1 754.9 | 1 183.0 | 850.0 | 499.4 | 466.1 | *-6.7%* |
| **LT** | **Online** | **348.9** | **488.7** | **598.7** | **661.8** | **719.4** | *8.7%* |
| | Broadband | 341.2 | 485.1 | 596.8 | 660.9 | 718.6 | *8.7%* |
| | Narrowband | 7.7 | 3.6 | 1.9 | 0.9 | 0.7 | *-18.7%* |
| **LU** | **Online** | **127.2** | **137.5** | **150.2** | **166.2** | **174.3** | *4.9%* |
| | Broadband | 88.2 | 108.1 | 117.6 | 133.5 | 155.2 | *16.2%* |
| | Narrowband | 39.0 | 29.4 | 32.6 | 32.6 | 19.1 | *-41.4%* |
| **LV** | **Online** | **269.1** | **338.0** | **402.9** | **455.0** | **500.7** | *10.1%* |
| | Broadband | 199.8 | 286.6 | 338.6 | 377.1 | 423.0 | *12.2%* |
| | Narrowband | 69.3 | 51.3 | 64.3 | 77.9 | 77.8 | *-0.2%* |

T.5.26

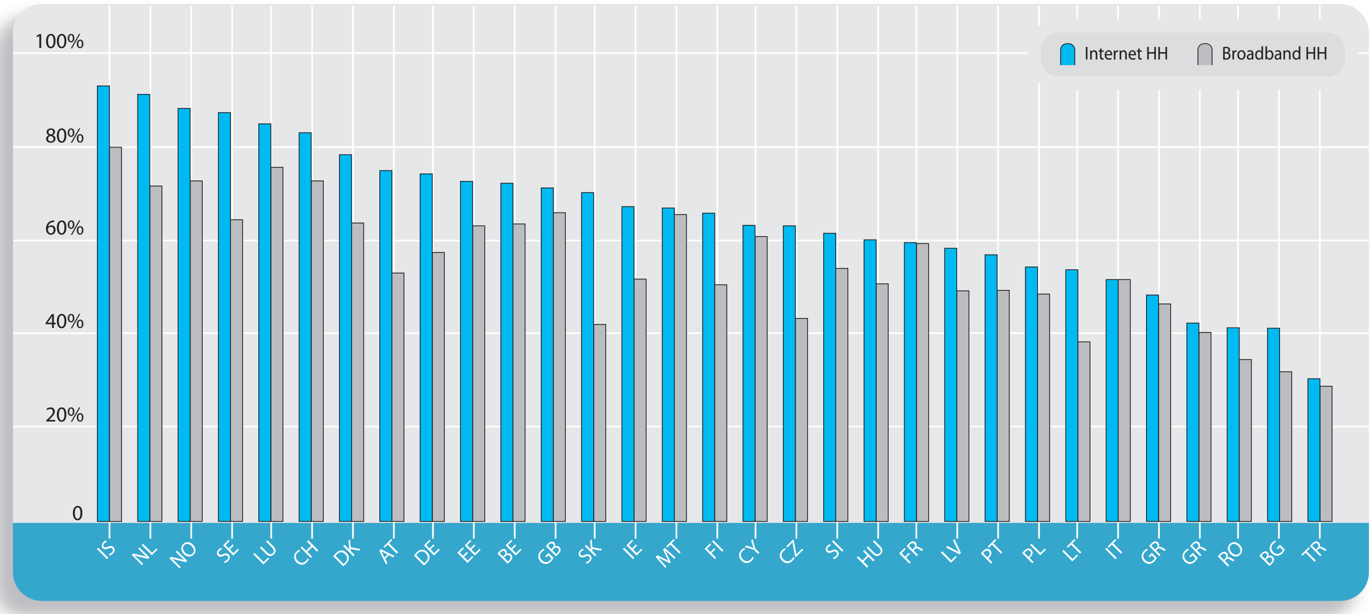
## Broadband and narrowband households (Continued)
### 2006-2010 In thousand.

| Country | | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|
| **MT** | **Online** | **72.9** | **77.1** | **82.6** | **88.4** | **93.7** | ***6.1%*** |
| | Broadband | 49.3 | 65.1 | 74.6 | 87.0 | 91.2 | ***4.8%*** |
| | Narrowband | 23.6 | 12.0 | 8.0 | 1.4 | 2.6 | ***88.8%*** |
| **NL** | **Online** | **5 907.8** | **6 163.2** | **6 396.5** | **6 593.5** | **6 697.8** | ***1.6%*** |
| | Broadband | 4 101.8 | 4 567.1 | 4 807.2 | 5 028.8 | 5 266.7 | ***4.7%*** |
| | Narrowband | 1 806.0 | 1 596.1 | 1 589.3 | 1 564.7 | 1 431.1 | ***-8.5%*** |
| **NO** | **Online** | **1 520.4** | **1 699.8** | **1 814.1** | **1 893.8** | **1 945.8** | ***2.7%*** |
| | Broadband | 1 109.6 | 1 330.5 | 1 460.0 | 1 538.4 | 1 604.6 | ***4.3%*** |
| | Narrowband | 410.8 | 369.3 | 354.1 | 355.4 | 341.1 | ***-4.0%*** |
| **PL** | **Online** | **5 232.7** | **5 930.7** | **6 458.1** | **6 903.2** | **7 174.1** | ***3.9%*** |
| | Broadband | 2 840.1 | 3 612.4 | 4 252.5 | 4 654.6 | 5 116.9 | ***9.9%*** |
| | Narrowband | 2 392.6 | 2 318.3 | 2 205.6 | 2 248.7 | 2 057.2 | ***-8.5%*** |
| **PT** | **Online** | **1 522.7** | **1 710.3** | **1 909.8** | **2 084.1** | **2 248.5** | ***7.9%*** |
| | Broadband | 1 211.6 | 1 345.1 | 1 558.8 | 1 735.8 | 1 948.6 | ***12.3%*** |
| | Narrowband | 311.1 | 365.2 | 351.0 | 348.3 | 299.9 | ***-13.9%*** |
| **RO** | **Online** | **1 321.1** | **1 918.1** | **2 502.6** | **2 902.1** | **3 067.0** | ***5.7%*** |
| | Broadband | 889.6 | 1 606.0 | 2 120.6 | 2 425.3 | 2 568.4 | ***5.9%*** |
| | Narrowband | 431.5 | 312.1 | 382.0 | 476.8 | 498.6 | ***4.6%*** |
| **SE** | **Online** | **3 452.5** | **3 559.6** | **3 633.3** | **3 672.5** | **3 710.5** | ***1.0%*** |
| | Broadband | 2 206.1 | 2 544.3 | 2 662.3 | 2 705.8 | 2 739.5 | ***1.2%*** |
| | Narrowband | 1 246.4 | 1 015.2 | 971.0 | 966.7 | 971.0 | ***0.5%*** |
| **SI** | **Online** | **374.9** | **410.1** | **433.0** | **452.2** | **497.4** | ***10.0%*** |
| | Broadband | 228.4 | 296.7 | 359.6 | 394.5 | 436.9 | ***10.8%*** |
| | Narrowband | 146.5 | 113.4 | 73.4 | 57.7 | 60.5 | ***4.9%*** |
| **SK** | **Online** | **691.1** | **854.7** | **997.3** | **1 118.7** | **1 233.1** | ***10.2%*** |
| | Broadband | 228.9 | 345.4 | 493.2 | 618.3 | 739.5 | ***19.6%*** |
| | Narrowband | 462.3 | 509.3 | 504.2 | 500.5 | 493.7 | ***-1.4%*** |
| **TR** | **Online** | **2 069.8** | **3 320.7** | **4 527.4** | **5 304.9** | **5 891.1** | ***11.1%*** |
| | Broadband | 1 657.4 | 2 839.2 | 4 361.3 | 4 979.7 | 5 582.4 | ***12.1%*** |
| | Narrowband | 412.4 | 481.4 | 166.1 | 325.3 | 308.8 | ***-5.1%*** |
| ***EUR 27*** | ***Online*** | ***100 392.4*** | ***110 396.9*** | ***118 942.2*** | ***126 037.9*** | ***132 192.7*** | *4.9%* |
| | ***Broadband*** | ***66 893.6*** | ***83 823.6*** | ***96 472.4*** | ***105 249.0*** | ***112 585.1*** | *7.0%* |
| | ***Narrowband*** | ***33 498.8*** | ***26 573.3*** | ***22 469.7*** | ***20 788.9*** | ***19 607.6*** | *-5.7%* |

Source: Screen Digest from industry data

G.5.15

## Penetration of broadband in European households
### 2010 Percentage of total households with internet/Percentage of total households with broadband.




Source: Screen Digest from industry data

T.5.27

## Broadband households by platform 2006-2010 In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **AT** | **1 405.2** | **1 603.3** | **1 766.9** | **1 916.8** | **2 080.5** | *8.5%* |
| DSL | 877.2 | 1 016.9 | 1 159.2 | 1 284.8 | 1 415.5 | *10.2%* |
| Cable | 499.4 | 522.0 | 559.4 | 587.4 | 624.0 | *6.2%* |
| Fibre-to-the-premises | 1.0 | 4.1 | 4.9 | 6.4 | 7.4 | *15.6%* |
| Other | 27.5 | 60.4 | 43.4 | 38.2 | 33.6 | *-12.0%* |
| **BE** | **2 365.5** | **2 635.7** | **2 918.7** | **3 204.2** | **3 331.2** | *4.0%* |
| DSL | 1 493.0 | 1 641.0 | 1 699.7 | 1 823.4 | 1 814.5 | *-0.5%* |
| Cable | 872.5 | 988.7 | 1 210.0 | 1 371.9 | 1 507.6 | *9.9%* |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.6 | 0.6 | 0.7 | *16.2%* |
| Other | 0.0 | 6.0 | 8.3 | 8.4 | 8.4 | *0.5%* |
| **BG** | **412.1** | **628.8** | **826.4** | **996.0** | **1 119.6** | *12.4%* |
| DSL | 95.0 | 162.7 | 253.2 | 309.7 | 346.5 | *11.9%* |
| Cable | 100.7 | 91.7 | 103.0 | 120.0 | 135.0 | *12.5%* |
| Fibre-to-the-premises | 6.9 | 10.5 | 14.4 | 24.8 | 33.0 | *33.1%* |
| Other | 209.5 | 363.9 | 455.7 | 541.4 | 605.1 | *11.8%* |
| **CH** | **2 036.6** | **2 323.2** | **2 526.9** | **2 712.3** | **2 859.1** | *5.4%* |
| DSL | 1 368.0 | 1 603.4 | 1 787.0 | 1 956.0 | 2 065.0 | *5.6%* |
| Cable | 660.0 | 710.4 | 730.0 | 746.2 | 783.6 | *5.0%* |
| Fibre-to-the-premises | 4.2 | 4.8 | 4.9 | 5.0 | 5.2 | *4.0%* |
| Other | 4.4 | 4.6 | 5.0 | 5.1 | 5.3 | *3.5%* |
| **CY** | **72.7** | **109.9** | **144.0** | **174.9** | **202.2** | *15.6%* |
| DSL | 69.5 | 105.2 | 135.9 | 161.9 | 179.5 | *10.8%* |
| Cable | 0.0 | 0.0 | 3.4 | 8.5 | 18.5 | *118.2%* |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 3.2 | 4.7 | 4.8 | 4.5 | 4.2 | *-6.6%* |
| **CZ** | **1 015.2** | **1 331.9** | **1 752.7** | **2 021.9** | **2 234.4** | *10.5%* |
| DSL | 492.5 | 613.0 | 692.8 | 793.9 | 863.8 | *8.8%* |
| Cable | 231.5 | 309.1 | 370.0 | 447.0 | 517.6 | *15.8%* |
| Fibre-to-the-premises | 24.0 | 49.0 | 80.0 | 109.0 | 129.0 | *18.3%* |
| Other | 267.2 | 360.8 | 609.9 | 672.0 | 724.0 | *7.7%* |
| **DE** | **14 874.9** | **19 480.0** | **22 924.5** | **24 913.3** | **26 215.4** | *5.2%* |
| DSL | 14 384.0 | 18 528.3 | 21 265.4 | 22 535.6 | 23 191.7 | *2.9%* |
| Cable | 425.0 | 878.7 | 1 564.2 | 2 261.5 | 2 881.8 | *27.4%* |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.4 | 0.7 | *75.0%* |
| Other | 65.9 | 73.0 | 94.8 | 115.7 | 141.2 | *22.0%* |
| **DK** | **1 722.5** | **1 953.2** | **2 036.1** | **2 085.4** | **2 123.1** | *1.8%* |
| DSL | 1 062.1 | 1 206.9 | 1 244.0 | 1 251.0 | 1 227.4 | *-1.9%* |
| Cable | 506.9 | 541.8 | 538.9 | 556.9 | 565.6 | *1.6%* |
| Fibre-to-the-premises | 111.2 | 156.4 | 201.5 | 223.3 | 249.0 | *11.5%* |
| Other | 42.3 | 48.0 | 51.7 | 54.2 | 81.1 | *49.6%* |
| **EE** | **262.2** | **324.9** | **355.5** | **414.3** | **441.5** | *6.5%* |
| DSL | 120.6 | 135.3 | 137.6 | 181.0 | 188.6 | *4.2%* |
| Cable | 75.8 | 92.8 | 101.6 | 108.0 | 115.8 | *7.2%* |
| Fibre-to-the-premises | 40.1 | 52.0 | 66.5 | 71.8 | 75.7 | *5.4%* |
| Other | 25.7 | 44.8 | 49.8 | 53.5 | 61.4 | *14.7%* |
| **ES** | **6 623.2** | **7 918.3** | **8 966.4** | **9 643.1** | **10 431.1** | *8.2%* |
| DSL | 5 232.0 | 6 304.0 | 7 182.0 | 7 734.3 | 8 393.4 | *8.5%* |
| Cable | 1 365.1 | 1 575.4 | 1 719.1 | 1 819.6 | 1 917.6 | *5.4%* |
| Fibre-to-the-premises | 0.0 | 0.0 | 4.0 | 15.9 | 43.0 | *171.0%* |
| Other | 26.2 | 38.9 | 61.3 | 73.3 | 77.1 | *5.2%* |
| **FI** | **1 428.0** | **1 618.1** | **1 628.4** | **1 581.9** | **1 566.7** | *-1.0%* |
| DSL | 1 232.8 | 1 348.0 | 1 332.5 | 1 265.9 | 1 230.0 | *-2.8%* |
| Cable | 181.1 | 209.6 | 214.8 | 222.7 | 234.0 | *5.1%* |
| Fibre-to-the-premises | 5.0 | 26.5 | 33.7 | 39.3 | 45.2 | *15.2%* |
| Other | 9.1 | 34.0 | 47.4 | 54.1 | 57.6 | *6.4%* |
| **FR** | **12 652.5** | **15 652.5** | **17 854.6** | **19 664.7** | **21 085.4** | *7.2%* |
| DSL | 12 019.0 | 14 835.0 | 16 804.0 | 18 491.1 | 19 656.5 | *6.3%* |
| Cable | 627.5 | 783.5 | 987.0 | 1 070.1 | 1 213.1 | *13.4%* |
| Fibre-to-the-premises | 0.0 | 23.0 | 43.0 | 70.0 | 146.0 | *108.6%* |
| Other | 6.0 | 11.0 | 20.6 | 33.5 | 69.8 | *108.6%* |

T.5.27

## Broadband households by platform (Continued)
### 2006-2010 In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **GB** | **13 007.4** | **15 712.9** | **17 342.6** | **18 258.3** | **19 500.1** | ***6.8%*** |
| DSL | 9 934.0 | 12 283.0 | 13 625.0 | 14 370.0 | 15 431.1 | ***7.4%*** |
| Cable | 3 058.5 | 3 413.9 | 3 682.8 | 3 837.8 | 4 012.8 | ***4.6%*** |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.5 | 0.7 | ***34.0%*** |
| Other | 14.9 | 16.0 | 34.8 | 50.0 | 55.6 | ***11.1%*** |
| **GR** | **501.6** | **1 065.5** | **1 503.9** | **1 916.7** | **2 219.3** | ***15.8%*** |
| DSL | 500.1 | 1 063.3 | 1 496.5 | 1 908.3 | 2 210.2 | ***15.8%*** |
| Cable | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 1.5 | 2.2 | 7.4 | 8.4 | 9.1 | ***7.9%*** |
| **HU** | **1 078.0** | **1 436.7** | **1 695.8** | **1 914.3** | **2 075.3** | ***8.4%*** |
| DSL | 631.2 | 782.9 | 840.3 | 856.3 | 867.7 | ***1.3%*** |
| Cable | 406.0 | 580.0 | 761.0 | 958.0 | 1 090.4 | ***13.8%*** |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 40.8 | 73.8 | 94.5 | 100.0 | 117.2 | ***17.2%*** |
| **IE** | **517.0** | **759.3** | **891.1** | **974.6** | **1 016.6** | ***4.3%*** |
| DSL | 379.5 | 552.1 | 662.0 | 715.0 | 733.8 | ***2.6%*** |
| Cable | 55.3 | 80.5 | 101.9 | 148.1 | 199.2 | ***34.5%*** |
| Fibre-to-the-premises | 0.0 | 4.0 | 6.6 | 7.2 | 7.5 | ***4.2%*** |
| Other | 82.2 | 122.7 | 120.6 | 104.3 | 76.1 | ***-27.0%*** |
| **IS** | **87.1** | **97.3** | **103.7** | **107.1** | **109.8** | ***2.5%*** |
| DSL | 85.3 | 94.6 | 98.8 | 97.9 | 97.0 | ***-0.9%*** |
| Cable | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 1.8 | 2.7 | 4.9 | 9.2 | 12.8 | ***38.9%*** |
| **IT** | **8 719.4** | **10 327.8** | **11 544.1** | **12 755.1** | **13 492.7** | ***5.8%*** |
| DSL | 8 368.4 | 9 992.6 | 11 175.1 | 12 373.1 | 13 102.5 | ***5.9%*** |
| Cable | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Fibre-to-the-premises | 246.0 | 267.2 | 302.0 | 332.0 | 349.7 | ***5.3%*** |
| Other | 105.0 | 68.0 | 67.0 | 50.0 | 40.5 | ***-19.0%*** |
| **LT** | **404.6** | **574.3** | **704.5** | **792.5** | **861.0** | ***8.6%*** |
| DSL | 178.6 | 231.4 | 251.0 | 228.0 | 196.4 | ***-13.9%*** |
| Cable | 65.8 | 65.0 | 65.5 | 52.8 | 44.4 | ***-16.0%*** |
| Fibre-to-the-premises | 96.6 | 157.8 | 212.7 | 282.0 | 347.6 | ***23.2%*** |
| Other | 63.6 | 120.1 | 175.3 | 229.6 | 272.6 | ***18.7%*** |
| **LU** | **102.0** | **124.5** | **135.4** | **153.1** | **177.5** | ***15.9%*** |
| DSL | 88.3 | 107.7 | 116.3 | 125.2 | 143.5 | ***14.6%*** |
| Cable | 13.4 | 16.0 | 18.0 | 25.2 | 31.4 | ***24.4%*** |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 0.3 | 0.8 | 1.2 | 2.7 | 2.7 | ***-1.5%*** |
| **LV** | **222.8** | **327.8** | **387.2** | **434.3** | **486.5** | ***12.0%*** |
| DSL | 107.5 | 152.3 | 184.0 | 189.7 | 210.8 | ***11.1%*** |
| Cable | 38.5 | 38.9 | 37.2 | 35.3 | 35.3 | ***0.0%*** |
| Fibre-to-the-premises | 63.6 | 119.3 | 151.2 | 199.3 | 230.8 | ***15.8%*** |
| Other | 13.1 | 17.3 | 14.8 | 10.0 | 9.5 | ***-4.9%*** |
| **MT** | **63.1** | **81.3** | **95.5** | **111.6** | **118.3** | ***6.0%*** |
| DSL | 35.6 | 38.3 | 46.0 | 52.7 | 57.5 | ***9.1%*** |
| Cable | 27.5 | 43.0 | 46.0 | 54.2 | 53.2 | ***-1.8%*** |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 0.0 | 0.0 | 3.5 | 4.7 | 7.6 | ***62.7%*** |
| **NL** | **5 059.5** | **5 616.8** | **5 906.8** | **6 141.2** | **6 376.5** | ***3.8%*** |
| DSL | 3 047.0 | 3 396.0 | 3 597.0 | 3 645.0 | 3 632.1 | ***-0.4%*** |
| Cable | 1 962.1 | 2 144.0 | 2 211.0 | 2 354.4 | 2 564.6 | ***8.9%*** |
| Fibre-to-the-premises | 48.0 | 74.0 | 96.0 | 139.0 | 177.0 | ***27.3%*** |
| Other | 2.4 | 2.8 | 2.8 | 2.8 | 2.8 | ***0.0%*** |
| **NO** | **1 237.1** | **1 478.1** | **1 610.1** | **1 687.5** | **1 754.2** | ***4.0%*** |
| DSL | 975.0 | 1 097.0 | 1 091.5 | 1 032.2 | 981.2 | ***-4.9%*** |
| Cable | 175.0 | 230.7 | 338.1 | 414.3 | 469.6 | ***13.3%*** |
| Fibre-to-the-premises | 63.0 | 120.0 | 147.0 | 205.0 | 262.0 | ***27.8%*** |
| Other | 24.1 | 30.4 | 33.5 | 36.0 | 41.4 | ***15.0%*** |

T.5.27

## Broadband households by platform (Continued)

2006-2010 In thousand.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **PL** | **3 299.6** | **4 079.4** | **4 746.2** | **5 165.4** | **5 668.3** | ***9.7%*** |
| DSL | 1 853.5 | 2 344.9 | 2 676.0 | 2 863.5 | 3 142.3 | ***9.7%*** |
| Cable | 690.0 | 1 030.0 | 1 315.0 | 1 525.0 | 1 704.2 | ***11.8%*** |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 756.2 | 704.5 | 755.2 | 776.9 | 821.8 | ***5.8%*** |
| **PT** | **1 467.2** | **1 559.8** | **1 750.4** | **1 925.4** | **2 148.0** | ***11.6%*** |
| DSL | 916.0 | 927.8 | 996.6 | 1 108.7 | 1 134.3 | ***2.3%*** |
| Cable | 546.6 | 617.1 | 728.0 | 761.7 | 860.2 | ***12.9%*** |
| Fibre-to-the-premises | 0.0 | 0.0 | 3.0 | 30.0 | 130.0 | ***333.3%*** |
| Other | 4.6 | 14.9 | 22.8 | 25.0 | 23.6 | ***-5.8%*** |
| **RO** | **1 082.3** | **1 937.6** | **2 500.5** | **2 833.3** | **2 975.7** | ***5.0%*** |
| DSL | 98.4 | 365.0 | 650.7 | 807.9 | 926.2 | ***14.6%*** |
| Cable | 630.9 | 983.9 | 1 313.5 | 1 514.0 | 1 614.0 | ***6.6%*** |
| Fibre-to-the-premises | 56.6 | 79.4 | 86.3 | 95.0 | 82.8 | ***-12.8%*** |
| Other | 296.4 | 509.3 | 449.9 | 416.4 | 352.7 | ***-15.3%*** |
| **SE** | **2 397.5** | **2 780.7** | **2 903.3** | **2 944.3** | **2 974.5** | ***1.0%*** |
| DSL | 1 531.0 | 1 715.0 | 1 737.4 | 1 666.0 | 1 610.0 | ***-3.4%*** |
| Cable | 453.8 | 536.0 | 562.7 | 579.2 | 594.4 | ***2.6%*** |
| Fibre-to-the-premises | 390.0 | 509.0 | 590.0 | 687.0 | 759.0 | ***10.5%*** |
| Other | 22.7 | 20.7 | 13.2 | 12.1 | 11.1 | ***-8.3%*** |
| **SI** | **268.9** | **348.9** | **423.9** | **465.1** | **517.9** | ***11.4%*** |
| DSL | 192.7 | 250.7 | 281.8 | 287.1 | 287.5 | ***0.1%*** |
| Cable | 72.0 | 85.0 | 95.0 | 106.0 | 120.0 | ***13.2%*** |
| Fibre-to-the-premises | 3.5 | 12.4 | 40.5 | 67.5 | 95.5 | ***41.6%*** |
| Other | 0.7 | 0.8 | 6.6 | 4.5 | 14.9 | ***228.1%*** |
| **SK** | **305.9** | **445.5** | **629.5** | **776.2** | **930.5** | ***19.9%*** |
| DSL | 182.0 | 261.0 | 339.0 | 391.2 | 442.6 | ***13.1%*** |
| Cable | 44.1 | 63.1 | 86.0 | 107.0 | 129.8 | ***21.3%*** |
| Fibre-to-the-premises | 32.3 | 48.3 | 119.7 | 154.0 | 184.2 | ***19.6%*** |
| Other | 47.5 | 73.1 | 84.8 | 124.0 | 173.9 | ***40.2%*** |
| **TR** | **2 871.9** | **4 551.6** | **5 903.9** | **6 354.0** | **6 883.1** | ***8.3%*** |
| DSL | 2 820.0 | 4 500.0 | 5 830.0 | 6 200.0 | 6 618.7 | ***6.8%*** |
| Cable | 48.1 | 47.0 | 67.0 | 146.0 | 258.0 | ***76.7%*** |
| Fibre-to-the-premises | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | |
| Other | 3.8 | 4.6 | 6.9 | 8.0 | 6.4 | ***-19.5%*** |
| | | | | | | |
| ***EUR 27*** | ***81 330.5*** | ***100 435.3*** | ***114 334.8*** | ***124 177.8*** | ***132 369.6*** | ***15.8%*** |
| ***DSL*** | ***65 121.4*** | ***80 360.2*** | ***90 581.1*** | ***97 420.5*** | ***102 635.8*** | ***13.3%*** |
| ***Cable*** | ***12 949.9*** | ***15 689.8*** | ***18 395.0*** | ***20 632.2*** | ***22 784.3*** | ***23.9%*** |
| ***Fibre-to-the-premises*** | ***1 124.9*** | ***1 592.9*** | ***2 056.8*** | ***2 554.8*** | ***3 094.6*** | ***50.5%*** |
| ***Other*** | ***2 134.3*** | ***2 792.5*** | ***3 302.0*** | ***3 570.2*** | ***3 854.9*** | ***16.7%*** |

The Screen Digest definition of **fibre-to-the-premises** (FTTP) includes connections where:
- Fibre runs all the way to the home or office itself (FTTH/FTTO) - the home or office may be detached or within a building.
- Fibre runs to the base of a building (FTTB) - where homes or offices inside are linked typically via Ethernet cabling.

The definition for FTTP connections includes both residential and business connections.

Where fibre-to-the-premises connections are zero, the country has seen no meaningful fibre rollout and FTTP connections are not reported by the regulatory body.

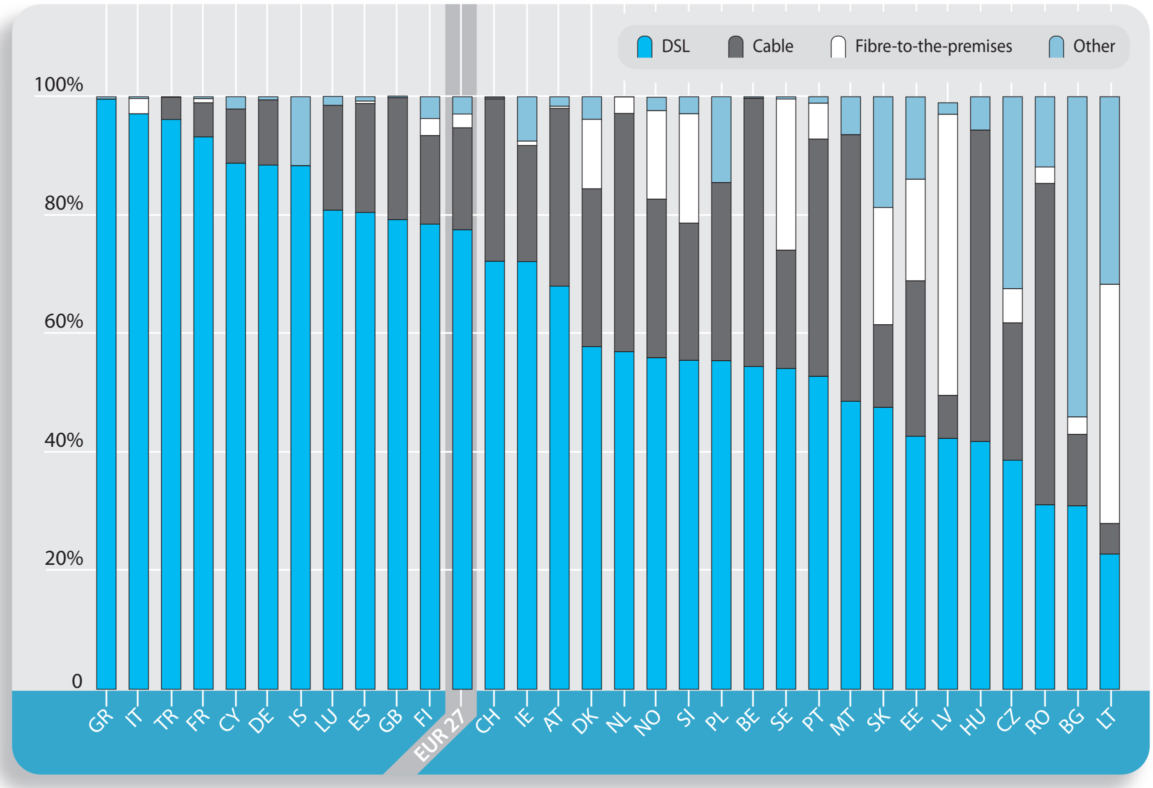
As for the "**other**" category:
- Where FTTP is not visible as a separate category within the data table, "other" includes FTTP, local area network (LAN), fixed wireless (excl. mobile broadband) and satellite connections.
- Where FTTP is visible as a separate category within the data table, "other" includes local area network (LAN), fixed wireless (excl. mobile broadband) and satellite connections.

Source: Screen Digest from industry data

G.5.16

# Breakdown of broadband households by platform

2010 In % of households connected to broadband.

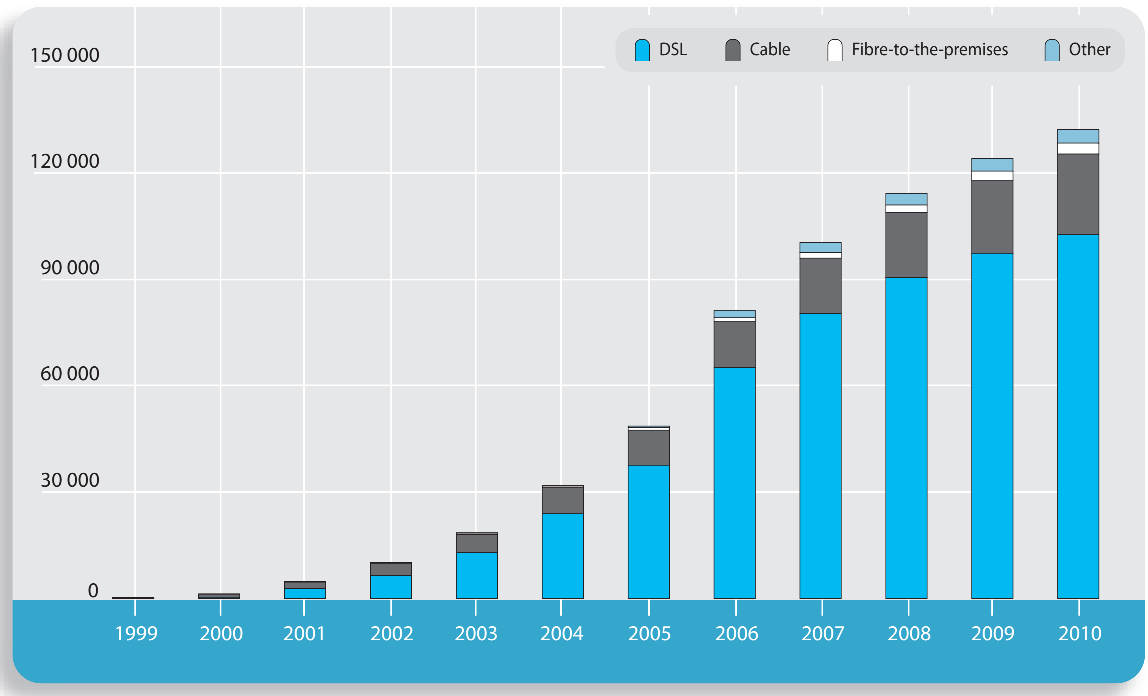



Source: European Audiovisual Observatory on Screen Digest data

G.5.17

# Broadband households by platform in the European Union

1999-2010 In thousand.




Source: European Audiovisual Observatory on Screen Digest data

T.5.28
G.5.18

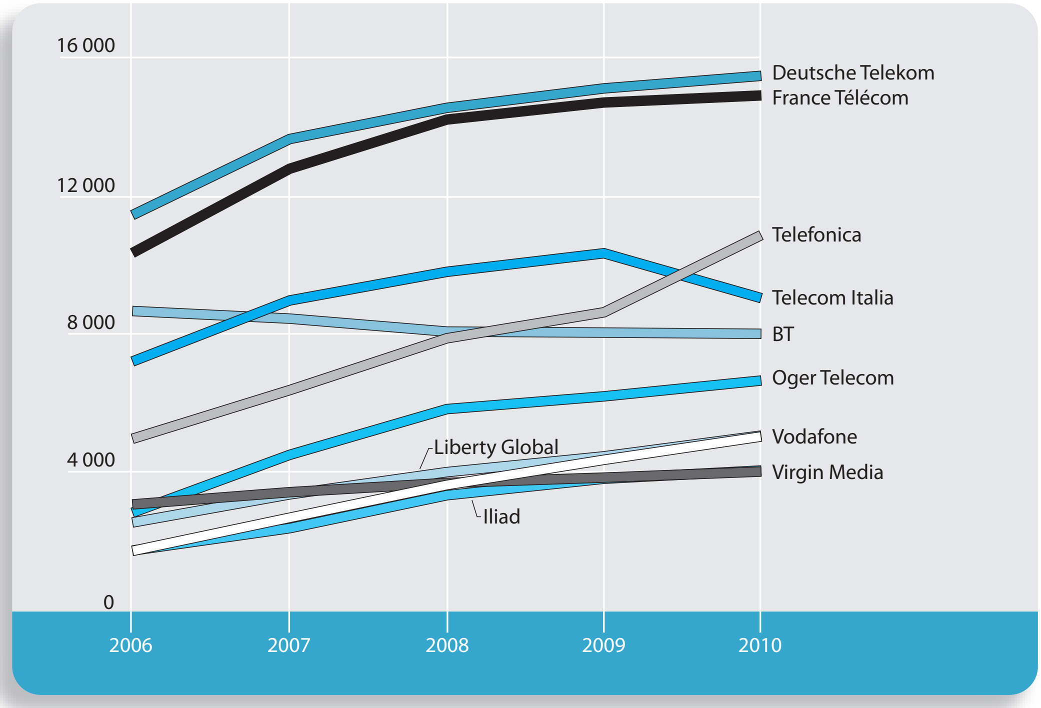
# Top 10 European broadband network operators 2006-2010

Subscribers in thousand.

| Rank | Operator | Active European countries | Platform | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | Deutsche Telekom | **FR, DE, ES, HU, NL,SK** | DSL, cable | 11 473 | 13 683 | 14 590 | 15 155 | 15 521 | ***2.4%*** |
| 2 | France Telecom | **BE, ES, FR, GB, NL, PL, SK** | DSL, FTTP | 10 372 | 12 820 | 14 249 | 14 744 | 14 950 | ***1.4%*** |
| 3 | Telefonica | **CO, CZ, DE, ES, GB** | DSL, BWFA, FTTP | 4 967 | 6 383 | 7 889 | 8 644 | 10 886 | ***25.9%*** |
| 4 | Telecom Italia | **DE, IT** | DSL | 7 216 | 8 989 | 9 822 | 10 362 | 9 058 | ***-12.6%*** |
| 5 | BT | **GB, IE** | DSL | 8 681 | 8 461 | 8 083 | 8 055 | 8 019 | ***-0.4%*** |
| 6 | Oger Telecom | **TR** | DSL | 2 820 | 4 500 | 5 830 | 6 200 | 6 660 | ***7.4%*** |
| 7 | Liberty Global | **AT, BE, CZ, DE, FR, HU, IE, NL, PL, RO** | Cable, DSL | 2 533 | 3 351 | 3 998 | 4 455 | 5 059 | ***13.5%*** |
| 8 | Vodafone | **DE, ES, IE, IT, PT** | DSL | 1 706 | 2 671 | 3 623 | 4 355 | 5 031 | ***15.5%*** |
| 9 | Iliad | **FR** | DSL | 1 718 | 2 367 | 3 325 | 3 805 | 4 044 | ***6.3%*** |
| 10 | Virgin Media | **UK** | Cable | 3 059 | 3 414 | 3 683 | 3 838 | 4 013 | ***4.6%*** |

Source: Screen Digest from industry data

EUR thousand.

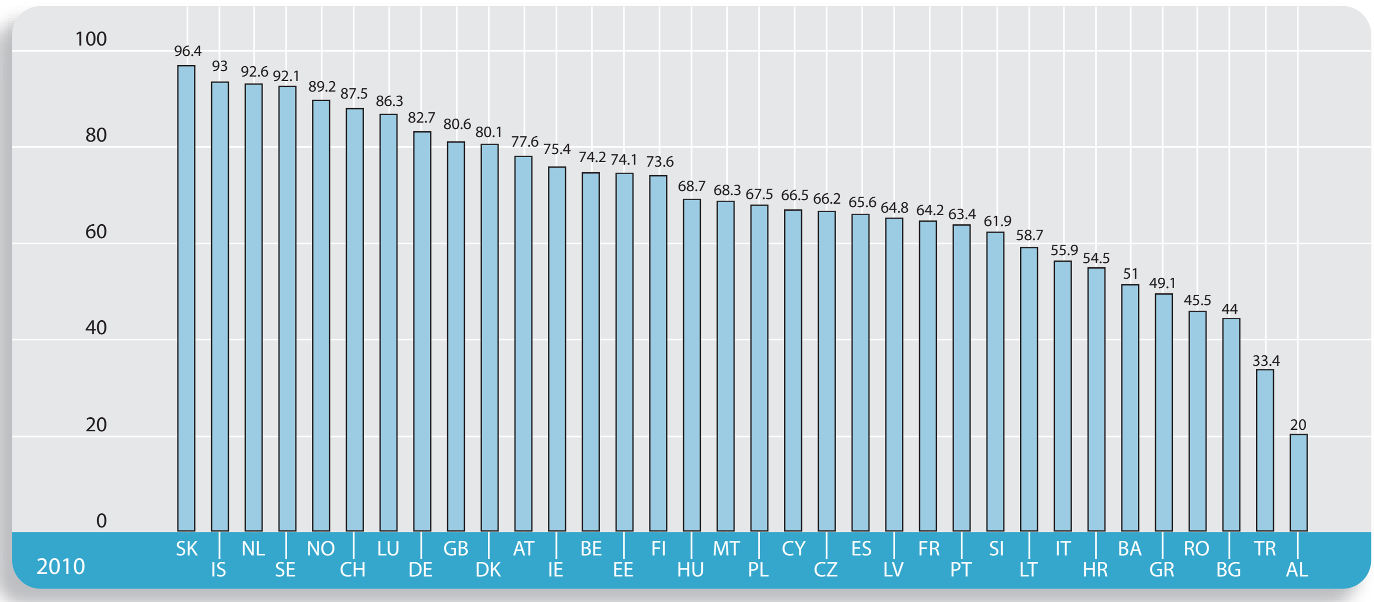


T.5.29
G.5.19

## Households equipped with a PC
## 2005-2010 In thousand.

| Country | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|
| **AT** | 2 305.7 | 2 451.3 | 2 606.9 | 2 679.6 | 2 746.0 | 2 810.0 | ***2.3%*** |
| **BE** | 2 514.0 | 2 816.9 | 3 131.3 | 3 266.7 | 3 352.0 | 3 429.7 | ***2.3%*** |
| **BG** | 622.2 | 687.8 | 809.4 | 939.5 | 1 103.2 | 1 252.3 | ***13.5%*** |
| **CH** | 2 474.9 | 2 580.9 | 2 697.2 | 2 801.5 | 2 896.9 | 2 972.8 | ***2.6%*** |
| **CY** | 144.4 | 152.3 | 165.9 | 176.5 | 183.2 | 189.4 | ***3.4%*** |
| **CZ** | 1 422.4 | 1 613.6 | 1 906.4 | 2 230.3 | 2 564.7 | 2 930.8 | ***14.3%*** |
| **DE** | 27 234.1 | 28 791.4 | 29 793.5 | 30 777.1 | 31 780.8 | 32 750.3 | ***3.1%*** |
| **DK** | 2 101.1 | 2 173.5 | 2 227.7 | 2 249.6 | 2 266.0 | 2 279.4 | ***0.6%*** |
| **EE** | 245.0 | 297.5 | 353.7 | 386.1 | 399.9 | 409.6 | ***2.4%*** |
| **ES** | 8 375.2 | 9 009.7 | 9 630.6 | 10 223.1 | 10 764.8 | 11 267.5 | ***4.7%*** |
| **FI** | 1 556.5 | 1 732.5 | 1 851.3 | 1 937.0 | 1 994.8 | 2 033.9 | ***2.0%*** |
| **FR** | 13 138.2 | 14 280.2 | 15 284.8 | 16 243.4 | 17 140.9 | 18 027.2 | ***5.2%*** |
| **GB** | 16 996.2 | 17 701.3 | 18 826.0 | 19 937.3 | 20 893.9 | 21 788.1 | ***4.3%*** |
| **GR** | 1 362.0 | 1 571.1 | 1 748.5 | 1 901.5 | 2 027.1 | 2 140.7 | ***5.6%*** |
| **HU** | 1 812.2 | 2 081.4 | 2 239.5 | 2 385.1 | 2 498.5 | 2 602.2 | ***4.2%*** |
| **IE** | 794.8 | 941.1 | 1 057.7 | 1 145.9 | 1 221.0 | 1 256.1 | ***2.9%*** |
| **IS** | 93.8 | 96.9 | 101.9 | 107.7 | 111.0 | 114.1 | ***2.8%*** |
| **IT** | 10 273.6 | 10 863.7 | 11 478.4 | 12 300.7 | 13 112.4 | 13 913.3 | ***6.1%*** |
| **LT** | 464.4 | 540.5 | 621.3 | 696.0 | 764.5 | 815.9 | ***6.7%*** |
| **LU** | 132.5 | 139.7 | 147.5 | 155.5 | 169.4 | 177.3 | ***4.7%*** |
| **LV** | 309.1 | 379.3 | 448.3 | 491.3 | 527.6 | 555.2 | ***5.2%*** |
| **MT** | 77.3 | 79.6 | 81.7 | 85.2 | 89.8 | 95.1 | ***5.8%*** |
| **NL** | 5 947.3 | 6 101.2 | 6 271.2 | 6 497.9 | 6 693.9 | 6 796.4 | ***1.5%*** |
| **NO** | 1 522.0 | 1 623.9 | 1 783.7 | 1 856.8 | 1 921.9 | 1 965.4 | ***2.3%*** |
| **PL** | 6 084.9 | 7 042.9 | 7 760.0 | 8 231.2 | 8 647.2 | 8 989.6 | ***4.0%*** |
| **PT** | 1 727.0 | 1 854.6 | 1 954.0 | 2 135.2 | 2 346.6 | 2 500.5 | ***6.6%*** |
| **RO** | 1 355.0 | 2 096.9 | 2 660.4 | 2 998.9 | 3 225.4 | 3 370.3 | ***4.5%*** |
| **SE** | 3 611.0 | 3 687.1 | 3 760.5 | 3 826.9 | 3 869.8 | 3 909.4 | ***1.0%*** |
| **SI** | 421.0 | 455.2 | 457.3 | 471.3 | 494.7 | 499.6 | ***1.0%*** |
| **SK** | 1 053.9 | 1 151.9 | 1 306.8 | 1 477.4 | 1 615.2 | 1 690.2 | ***4.6%*** |
| **TR** | 2 041.7 | 2 737.8 | 3 649.1 | 4 975.2 | 5 810.4 | 6 438.4 | ***10.8%*** |
| ***EUR 27*** | ***112 080.7*** | ***120 694.2*** | ***128 580.9*** | ***135 846.0*** | ***142 493.1*** | ***148 480.3*** | ***4.2%*** |

In %.




Source: European Audiovisual Observatory on Screen Digest and Eurostat data, and World Bank data for Albania

T.5.30

# Main online distribution platforms of TV services
## March 2012

| Country of estab. | Company | Name of service | Paying / Free | Accessibility | |
|---|---|---|---|---|---|
| **European agregators providing players allowing access to various TV channels** | | | | | |
| **CH** | Zattoo AG | Zattoo | Paying | CH, DE, DK, ES, FR GB | 550 000 active users in Germany and 400 0000 in Switzerland (end of summer 2011). Overall 9 million users have registered with Zattoo and statistically one out of every three residents in Switzerland have an account. Zattoo proposes also Apps for iPhone and iPad. |
| **GB** | Livestation Ltd | Livestation | Free | Worldwide | Livestation provides Live-TV in the world and has agreement with the main international news channels (Al Jazeera, BBC World News, Bloomberg TV, C-Span, CNBC, CNN, Euronews, France 24, Press TV, RT). The plaform is accessible on the PC, through Apps for smartphones and tablets, through some set-top boxes or smart TV sets. The company claims millions of visitors every day, 31 millions of video viewing per months, 15 millions unique visitors per months, 13 minutes by visit; 65 % of the viewers have university degree or higher (non dated information from a presentation to advertisers on Livestation website visited 8 March 2012). |
| | ~ | Viewmytv | Free | Worldwide | Viewmytv is an agregator of links to live and on-demand audiovisual online services from the various regions of the world. The services are seen in the company own player after an advertising spot. |
| **NL** | wwiTV.com B.V. | wwwTV | Free | Worldwide | The Dutch company wwiTV.com is an agregator of links to live and on-demand online audiovisual services, from the various regions in the world. In some cases, the link goes directly to the webpage of the service but, in most of the cases the signal is accessible. |
| **TR** | TTNet | Tivibu | Paying | TR | Tivibu is an Internet television service that is provided by the Turkish telecom company TTNET. This service offers television and cinema experiences to the users in Turkey through its high-speed broadband service. WebTV does not require the user to have a fixed location or a set-top-box. The software and the middleware for Tivibu, have been developed by Argela. |

| |
|---|
| **Other agregators based outside Europe and providing access to European Live-TV services** |
| GreekIPTV (US) ; Jump TV / Neu Lion (US); TVU Networks (US) |

| |
|---|
| **Agregators of links to Live-TV services on line** |
| Global Internet TV (GB), IPTV Guide (US), Lyngsat Stream (SE) |

| | | | |
|---|---|---|---|
| **Stores of applications for smartphone (iphone, Android) and/or tablets (iPad, Android) allowing access to applications of access to Live TV services or Live TV aggregators** | | | |
| | iTunes Store S.A.R.L. | iTunes Store | The Apple subsidiary, established in Luxembourg, provides stores with iPhone or iPad Apps in 36 European countries. |
| | Google Inc. | Google Play Store | The Google Play Store has replaced the former Android Market store on 6 March 2012. There is no clear indication on the website on the country of location of the portal, but the privacy page indicates that the service is provided by Google Inc. The accessibility of the national versions seems to be based on the IP of the user, who can then choose between linguistic versions of the browser. |
| | Amazon Inc. | Amazon Appstore for Android | In March 2011, Amazon Inc. has open a store of Android applications. A similar store does not exist in the European version of Amazon but the US store is accessible from Europe, with prices in USD. |

| | | |
|---|---|---|
| **Online UGC platforms allowing broadcasters to create "branded channels" with live audiovisual services** | | |
| Google Inc. | YouTube | The possibility of «branded channel» provided by YouTube's platform is mainly used by broadcasters for catch-up TV services (see T.7.7) but is also used by some of them (RAI, BBC Arabic) as platform for live broadcast. |

T.5.30

## Main online distribution platforms of TV services (Continued)
## March 2012

| Country of estab. | Company | Name of service |
|---|---|---|
| **Publishers of applications for smartphone (iPhone, Android) and/or tablets (iPad, Android) aggregating various TV channels** | | |
| ***Country in which the application platform is accessible*** | | |
| **AT** | A1 Telekom Austria, Sky Deutschland | |
| **BE** | Belgacom, Telenet | |
| **CH** | Orange Communications, Swisscom, Zattoo Live TV | |
| **DE** | Brothers Media, Deutsche Telekom, Sky Deutschland, Zattoo Live TV | |
| **DK** | Telenor, Yousee, Stofa TV, Viasat | |
| **ES** | France Telecom España, Sogecable, M2 Communicacion, Camadu Apps, iphonespino, Sesio's Company, Crazy Labs | |
| **FI** | Viasat | |
| **FR** | Bouygues Telecom, Brothers Media, Canal Plus, GoPod/Free, Orange | |
| **GB** | BSkyB | |
| **HU** | HBO Holding Zrt | |
| **IE** | BSkyB | |
| **IT** | Brothers Media, Sky Italia, Telecom Italia | |
| **NL** | Brothers Media | |
| **PL** | HBO Holding Zrt | |
| **PT** | PT-MEO | |
| **RO** | Orange Romania | |
| **RU** | Brothers Media, MTS | |
| **SE** | Viasat | |
| **TR** | Brothers Media, Turkcell, Tivibu, Turkey Tunes | |
| ***Applications accessible in various countries*** | | |
| **Established in European countries** | | |
| | Equinux (DE), WWWiTV (NL) | |
| **Established in US** | | |
| | Channel Chooser, Channel King, Easywebtvandradio, FreeTV Onlinbe, ITV Media Player, SatelliteDirect, TVonPC, TVWeb, ViewmyTV, WorldTVPCCOM | Chesntut Soft (Nettv), Global Software, PPCLink, TVU Network Corporation (TVU Player), Jutin.TV |

Source: European Audiovisual Observatory

Chapter
Chapitre
*Kapitel*
6

# Television services

# Les services de télévision

# *Fernsehdienste*

| Contents | Sommaire | *Inhalt* | |
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## Television market is still growing with 320 new channels in the European Union in 2011

In 2011, 320 new television channels were launched in the European Union. Unlike in previous years where sport was the dominant genre, in 2011 the growth of HD channels had a major impact on the overall growth of market. 58 HD simulcasts of existing channels were launched representing a mix of genres: generalist, film, entertainment and sport. This was followed by adult channels (46), entertainment channels (33), sport (23), film (22) and music (17). EU-based channels included 16 new public service channels, such as two from the ORF in Austria (ORF Sport Plus and ORF3 – Kultur und Information) and several launched by RTE to coincide with the launch of digital terrestrial television in Ireland (RTEjnr, TRTE, RTE 1 +1, etc.) Many new public service channels were HD versions (ARD EinsFestival HD, BBC Knowledge HD Poland, ERT HD, and RTE 2 HD).

### 56 new terrestrial channels in the European Union in 2011

Thanks to the expansion of digital terrestrial networks in Europe and the end of analogue terrestrial transmissions in several countries and regions in 2011, a further 56 new terrestrial channels were launched in 2011 (following 50 new channels in 2010). The majority of these new terrestrial channels are private (there were 9 new public terrestrial channels and 47 new private). These new channels included 10 HD channels. There were also a total of 14 new entertainment channels. New channels launched by the public service broadcasters included children's television, cultural channels and HD channels (or HD simulcasts).

### In 2011, 143 channels established in the European Union were closed down

Over the same period, a total of 143 channels were closed down in 2011. There was a continuation from 2010 of the closure of regional and local channels (17) although the reduction was not as dramatic. The most common types of channels in the European Union which ceased transmissions in 2011 were adult channels (24), sports channels (20) and music (14). The discontinuation of the Dahlia Pay-DTT service in Italy in February 2011 led to the closure of 16 TV channels. Others include some of the National Geographic music channels and the TMF channels in the Netherlands. One dramatic development in the market was the closure of the A1 TV channel in "The Former Yugoslav Republic of Macedonia", partly due to

## Le marché de la télévision poursuit sa croissance avec 320 nouvelles chaînes dans l'Union européenne en 2011

En 2011, 320 nouvelles chaînes de télévision ont vu le jour dans l'Union européenne. Contrairement aux années précédentes où le sport était le genre dominant, en 2011, ce sont les chaînes HD qui ont eu un impact majeur sur la croissance globale du marché. Il a été lancé 58 chaînes de diffusion simultanée en HD de chaînes existantes, proposant différents genres : généraliste, cinéma, divertissement et sport. Viennent ensuite les chaînes pour adultes (46), de divertissement (33), de sport (23), de cinéma (22) et musicales (17). Les chaînes implantées dans l'UE incluent 16 nouvelles chaînes de service public, notamment deux de l'ORF en Autriche (ORF Sport Plus et ORF3 - Kultur und Information) et plusieurs chaînes inaugurées par RTE à l'occasion du lancement de la télévision numérique terrestre en Irlande (RTEjnr, TRTE, RTE 1 +1, etc.). De nombreuses nouvelles chaînes de service public sont des versions HD (ARD EinsFestival HD, BBC Knowledge HD Poland, ERT HD et RTE 2 HD).

### 56 nouvelles chaînes terrestres dans l'Union européenne en 2011

Grâce à l'extension des réseaux numériques terrestres en Europe et à l'arrêt des transmissions analogiques terrestres dans plusieurs pays et régions en 2011, 56 nouvelles chaînes terrestres ont vu le jour en 2011 (en plus des 50 nouvelles chaînes en 2010). Ces nouvelles chaînes terrestres sont pour l'essentiel privées (on dénombre ainsi 9 nouvelles chaînes terrestres publiques et 47 nouvelles chaînes privées). Parmi ces nouvelles chaînes terrestres se trouvent 10 chaînes HD, ainsi que 14 nouvelles chaînes de divertissement. Les nouvelles chaînes lancées par les radiodiffuseurs de service public incluent des chaînes pour enfants, culturelles et HD (ou diffusion simultanée HD).

### En 2011, 143 chaînes établies dans l'Union européenne ont été fermées

Sur la même période, 143 chaînes ont été fermées. Les fermetures de chaînes régionales et locales (17) se sont poursuivies, mais dans une moindre mesure par rapport à 2010. Les chaînes ayant cessé leur transmission dans l'Union européenne en 2011 sont principalement des chaînes pour adultes (24), de sport (20) et musicales (14). L'abandon du service de TNT payant Dahlia en Italie en février 2011 a entraîné la fermeture de 16 chaînes de télévision. Sont également concernées les chaînes musicales de National Geographic et les chaînes TMF aux Pays-Bas. Un

## *Fernsehmarkt wächst weiter – 320 neue Kanäle in der Europäischen Union im Jahr 2011*

2011 sind in der EU 320 neue Fernsehkanäle auf Sendung gegangen. Im Gegensatz zu den Vorjahren, in denen Sport das vorherrschende Genre war, waren es 2011 neue HD-Kanäle, die maßgeblich zum Wachstum des Marktes beigetragen haben. So sind 2011 58 HD-Simulcast-Versionen bestehender Sender aller Genres an den Start gegangen, darunter Film-, Unterhaltungs-, Sport- und Vollprogrammsender. Dahinter folgen Erotikkanäle (46), Unterhaltungskanäle (33), Sportkanäle (23), Filmkanäle (22) und Musikkanäle (17). Zu den neuen Kanälen mit Sitz in der EU gehören 16 öffentlich-rechtliche, darunter beispielsweise zwei des ORF in Österreich (ORF Sport Plus und ORF3 – Kultur und Information) und mehrere Kanäle der irischen RTE, die gleichzeitig mit dem digitalen Antennenfernsehen in Irland an den Start gegangen sind (RTEjnr, TRTE, RTE 1 +1, etc.) Viele der neuen öffentlich-rechtlichen Kanäle sind HD-Versionen (ARD Eins-Festival HD, BBC Knowledge HD Poland, ERT HD und RTE 2 HD).

### *56 neue terrestrische Sender in der EU 2011*

Dank des Ausbaus der DVB-T-Netze in Europa und der 2011 erfolgten Abschaltung des analogen Antennenfernsehens in mehreren Ländern und Regionen sind weitere 56 neue terrestrische Sender 2011 an den Start gegangen (nach 50 neuen Sendern 2010). Dabei handelt es sich überwiegend um Sender privater Anbieter (9 öffentlich-rechtliche und 47 private Sender). Zu den neuen Sendern gehören 10 HD-Kanäle. Es gab auch insgesamt 14 neue Unterhaltungskanäle. Unter den neuen Kanälen, die von öffentlich-rechtlichen Sendern gestartet wurden, finden sich Kinder-, Kultur- und HD-Kanäle (bzw. HD Simulcasts).

### *2011 haben 143 Kanäle in der EU ihren Betrieb eingestellt*

Im gleichen Zeitraum wurden insgesamt 143 Kanäle eingestellt. Mit 17 eingestellten Regional- und Lokalsendern wurde der Trend von 2010 fortgesetzt, wenn auch in abgeschwächter Form. Zu den Sendern, die 2011 in der EU den Betrieb eingestellten haben, gehören Erotikkanäle (24), Sportkanäle (20) und Musikkanäle (14). Die Einstellung des Pay-DVB-T-Dienstes Dahlia in Italien im Februar 2011 führte zur Schließung von 16 Fernsehsendern. Hinzu kommen u.a. einige der Musikkanäle von National Geographic sowie die TMF-Kanäle in den Niederlanden. Eine dramatische Markentwicklung economic reasons but also because the frequency was taken away by the authorities, which has led to some international criticism.

### More than 10 000 European channels, including 7 600 channels established in the European Union

At the end of 2011, according to table T.6.1., there were 10 127 television channels in the European Audiovisual Observatory's 37 member states (7 613 in the EU 27). Of the 10 127 European channels 56% are regional or local channels and 44% are national and international channels.

Almost 13% of the EU-based channels are public. The proportion of public service channels is higher among international channels and those targeting more than one country, representing more than 18% of these channels. However, they only make up 8.8% of national channels in the European Union, and 16.6% of regional and local channels. Interestingly and logically, there is a much higher proportion of public channels on the digital terrestrial networks where they represent one quarter of all channels (25%).

### The United Kingdom is still the major "home" of television channels in the EU

Considering the origin of European Union channels, the United Kingdom still comes out on top with 1359 channels established there at the end of 2011 (table T.6.1). More than half of the channels established in the UK (54%) are broadcasting to other European countries, and this includes the many linguistic versions of channels such as Disney Cinemagic, Viasat Explorer etc. Following the United Kingdom are Italy (1 078), Spain (867), Hungary (575), France (570) and the Netherlands (452). Regional and local channels are particularly numerous in most of these countries, in contrast to the United Kingdom. The concentration of the establishment of channels in the European Union in certain countries is considerable since five countries account for almost two thirds of all channels.

However, these figures relate to the establishment of channels and not to their availability. For example only 24 channels are established in Ireland but there are more than 500 channels available on Irish television screens.

### Cinema and Sport

Among the channels established in the EU, cinema (and fiction) and sport channels represent the two most predominant channel genres in Europe, (when one excludes local and regional channels), with 644 and 575 channels, respectively.

événement inattendu a été la fermeture de la chaîne de télévision A1 dans « l'ex-République yougoslave de Macédoine », en partie pour des raisons économiques mais aussi parce que la fréquence a été supprimée par les autorités, ce qui a suscité certaines critiques au niveau international.

### Plus de 10 000 chaînes établies en Europe dont 7 600 établies dans l'Union européenne

A la fin de l'année 2011, on dénombre 10 127 chaînes de télévision établies dans les 37 pays européens membres de l'Observatoire (7 613 pour l'Union européenne), comme le montre le tableau T.6.1. Parmi ces 10 127 chaînes européennes, 56 % sont des chaînes régionales ou locales et 44 % sont internationales et nationales.

Près de 13 % des chaînes établies dans l'Union européenne sont publiques. La proportion de chaînes de service public est plus élevée parmi les chaînes internationales et celles ciblant plusieurs pays (18 % de ces chaînes). En revanche, elles ne constituent que 8,8 % des chaînes nationales dans l'Union européenne, et 16,6 % des chaînes régionales et locales. De manière intéressante et logique, les chaînes publiques sont particulièrement présentes sur les réseaux numériques terrestres puisqu'elles y représentent un quart des chaînes (25 %).

### *Le Royaume-Uni reste le principal « pays » des chaînes de télévision dans l'Union européenne*

Si l'on considère l'origine géographique des chaînes de l'Union européenne, le Royaume-Uni arrive toujours en tête avec 1 359 chaînes recensées fin 2011 (tableau T.6.1). Plus de la moitié des chaînes établies au Royaume-Uni (54 %) émettent vers d'autres pays européens et ce chiffre comprend de nombreuses versions linguistiques de chaînes telles que Disney Cinemagic, Viasat Explorer etc. Viennent ensuite l'Italie (1 078), l'Espagne (867), la Hongrie (575), la France (570) et les Pays-Bas (452). Les chaînes régionales et locales sont particulièrement nombreuses dans la plupart de ces pays, au contraire du Royaume-Uni. La concentration de l'établissement des chaînes communautaires dans quelques pays est considérable puisque cinq pays regroupent près de deux tiers des chaînes.

Ceci dit, ces chiffres portent sur l'établissement des chaînes et non sur leur disponibilité. Ainsi, seulement 24 chaînes sont établies en Irlande, mais plus de 500 chaînes sont visibles sur les écrans irlandais.

### Cinéma et sport

Parmi les chaînes établies dans l'UE, celles dédiées au cinéma (et à la fiction) et au sport représentent les deux genres

gab es mit der Schließung des Senders A1 in der „ehemaligen jugoslawischen Republik Mazedonien". Grund hierfür waren zum einen wirtschaftliche Umstände, aber auch die international viel kritisierte Entscheidung der Behörden, dem Sender die Frequenz zu entziehen.

### *Über 10 000 europäische Kanäle, davon 7 600 in der Europäischen Union*

Ende 2011 gab es in den 37 Mitgliedstaaten der Europäischen Audiovisuellen Informationsstelle 10 127 Fernsehsender (7 613 für die 27 EU-Mitgliedstaaten) (Tabelle T.6.1). Von den 10 127 europäischen Sendern sind 56 % regional oder lokal, 44 % international oder national ausgelegt.

Der Anteil der öffentlich-rechtlichen Sender in der EU liegt nahezu bei 13 %. Mit 18 % sind sie bei den internationalen Sendern und jenen, die in mehreren Ländern tätig sind, etwas stärker vertreten. Dagegen machen sie nur 8,8 % der nationalen Sender in der EU und 16,6 % der Regional und Lokalsender aus. Interessant und durchaus logisch ist die Tatsache, dass der Anteil der öffentlich-rechtlichen Sender in DVB-T-Netzen mit einem Viertel deutlich höher ausfällt (25 %).

### *Das Vereinigten Königreich ist nach wie vor die wichtigste „Heimat" für Fernsehsender in der EU*

Betrachtet man das Ursprungsland der Fernsehsender in der Europäischen Union, dann steht das Vereinigte Königreich mit 1359 Sendern Ende 2011 auf Platz eins (Tabelle T.6.1). Über die Hälfte der dort ansässigen Sender (54 %) strahlt ihr Programm auch auf andere Länder Europas aus, darunter die zahlreichen Sprachversionen von Kanälen wie Disney Cinemagic, Viasat Explorer usw. Hinter dem Vereinigten Königreich folgen Italien (1 078), Spanien (867), Ungarn (575), Frankreich (570) und die Niederlande (452), wobei die Regional und Lokalsender in den meisten dieser Länder – im Gegensatz zum Vereinigten Königreich – besonders zahlreich vertreten sind. Diese Konzentration der EU-Sender auf bestimmte Länder ist enorm: allein auf diese fünf Länder entfallen fast zwei Drittel aller Sender in Europa.

Allerdings beziehen sich diese Zahlen nur auf den Sitz der Sender und nicht auf ihre Verfügbarkeit. So haben zum Beispiel 24 Sender ihren Sitz in Irland, aber es können dort über 500 Kanäle empfangen werden.

### *Kinofilme und Sport*

Kinofilme (und Fiktion) und Sport sind mit 644 bzw. 575 Sendern die zwei vorherrschenden Genres im Angebot der Sender in der EU (ausgenommen

These two channel genres that largely broadcast exclusive content are of considerable importance for distribution platforms. Following these are the generalist channels (480), entertainment channels (470), music channels (343) and HD simulcast (338).

## A systematic survey of television channels

The rise in the number of reception platforms, special-interest and local channels and the increase in transnational broadcasting is gradually changing the national audiovisual landscapes. This development poses major problems when it comes to producing a summary description of the availability of channels in Europe. In order to present a relevant summary, we think it is important to distinguish between two fundamentally different statistical approaches in connection with counting the number of channels:

- one approach involves counting the number of channels established in a country;
- the other involves describing the choices available to viewers.

These two approaches differ fundamentally because the first is based on counting the actual providers and the services they offer, whether or not they are aimed at the national audience. However, some states, which benefit from the opportunities opened up by the European legal framework (European Convention on Transfrontier Television, Television without Frontiers Directive), have become hosts for service providers that broadcast to other European territories or even Europe as a whole.

On the other hand, the description of a national market and of the choices available to viewers would not make much sense in several countries if no account were taken of the presence of channels originating from abroad, especially "foreign dedicated channels". In order to identify the existing television channels, the Observatory now refers to the MAVISE database (http://mavise.obs.coe.int), which it has established on behalf of the European Commission's DG Communication.

The survey was produced on the basis of lists drawn up by national regulatory bodies and from other available sources, in particular the Lyngsat website (http://www.lyngsat.com), which provides complete and regularly updated information on the radio and television services available on the entire global satellite fleet.

prédominants en Europe (à l'exception des chaînes locales et régionales), avec respectivement 644 et 575 chaînes. Ces deux genres de chaînes, qui présentent généralement des contenus exclusifs, représentent des enjeux considérables pour les plates-formes de distribution. Derrière se trouvent les chaînes généralistes (480), les chaînes de divertissement (470), musicales (343) et HD simulcast (338).

## Un recensement systématique des chaînes de télévision

La multiplication des plates-formes de réception, des chaînes, mais aussi des cas de diffusion transfrontière modifie progressivement les paysages audiovisuels nationaux. Cette évolution pose divers problèmes pour une description de synthèse européenne de l'offre de chaînes. Pour présenter une synthèse pertinente, il nous paraît important de distinguer deux approches statistiques fondamentalement différentes dans la comptabilisation du nombre de chaînes :

- une approche consiste à comptabiliser le nombre de chaînes établies dans un pays ;
- l'autre consiste à décrire les possibilités de choix des téléspectateurs.

Ces deux approches sont fondamentalement distinctes, la première se basant sur un recensement des éditeurs de services et des services qu'ils proposent, que ceux-ci s'adressent ou non au public national. Or, profitant des possibilités légales ouvertes par le cadre juridique européen (Convention européenne sur la télévision transfrontière, Directive Télévision sans frontières), certains Etats sont devenus des territoires d'accueil pour des éditeurs de services qui visent d'autres pays territoires européens, voire l'ensemble de l'Europe.

A l'inverse, la description d'un marché national, et des possibilités de choix offertes aux téléspectateurs, n'aurait pas beaucoup de sens, dans plusieurs pays, si l'on ne tenait pas compte de la présence des chaînes en provenance d'autres pays, et en particulier des « chaînes étrangères dédiées ». Pour repérer les chaînes de télévision existantes, l'Observatoire se réfère dorénavant à la base de données MAVISE (http://mavise.obs.coe.int) qu'il a mise en place pour le compte de la DG Communication de la Commission européenne.

Le recensement est établi à partir des listes établies par les instances nationales de régulation, mais également à partir d'autres sources, en particulier le site Lyngsat (http://www.lyngsat.com) qui fournit un relevé complet et régulièrement mis à jour des services de radio et de télévision accessibles sur l'ensemble de la flotte satellitaire mondiale.

Lokal- und Regionalsender). Diese beiden Genres, die meistens exklusive Inhalte anbieten, sind für die Distributionsplattformen von großer Bedeutung. Dahinter folgen Vollprogrammsender (480), Unterhaltungssender (470), Musiksender (343) und HD Simulcasts (338).

## *Systematische Erfassung der Fernsehsender*

Die starke Zunahme von Empfangsplattformen, Spartenkanälen und Lokalsendern, aber auch die immer häufigere Ausstrahlung ins Ausland verändern schrittweise die audiovisuelle Medienlandschaft in den einzelnen Ländern. Diese Entwicklung birgt für die Erstellung einer europaweiten Übersicht über das Programmangebot mehrere erhebliche Schwierigkeiten. Für eine zweckmäßige Synthese sind unserer Auffassung nach zwei grundlegend unterschiedliche statistische Ansätze bei der Erfassung der Anzahl der Sender erforderlich:

- zum einen Erfassung der Anzahl der in einem Land niedergelassenen Sendeveranstalter,
- zum anderen Beschreibung der Empfangsmöglichkeiten der Zuschauer.

Diese beiden Ansätze unterscheiden sich insofern grundlegend voneinander, weil der erste auf einer Erfassung der Fernsehdienste und der von ihnen angebotenen Senderauswahl für Zuschauer im In- oder Ausland beruht. Unter Ausnutzung der durch den europäischen Rechtsrahmen geschaffenen legalen Möglichkeiten (Europäisches Übereinkommen über das grenzüberschreitende Fernsehen, Richtlinie „Fernsehen ohne Grenzen") gibt es in einigen Staaten Programmanbieter, die andere europäische Länder oder gar ganz Europa anvisieren.

Umgekehrt wäre die Beschreibung des Marktes eines Landes und der Auswahlmöglichkeiten der Zuschauer in vielen Ländern nicht sehr aussagekräftig, wenn nicht die Präsenz von anderen Sendern aus anderen Ländern und insbesondere die aus dem Ausland gezielt auf den heimischen Markt ausstrahlenden Dienste berücksichtigt würden. Zur Ermittlung der bestehenden Fernsehdienste stützt sich die Informationsstelle auf die Datenbank MAVISE (http://mavise.obs.coe.int), die sie im Auftrag der GD Kommunikation der Europäischen Kommission eingerichtet hat.

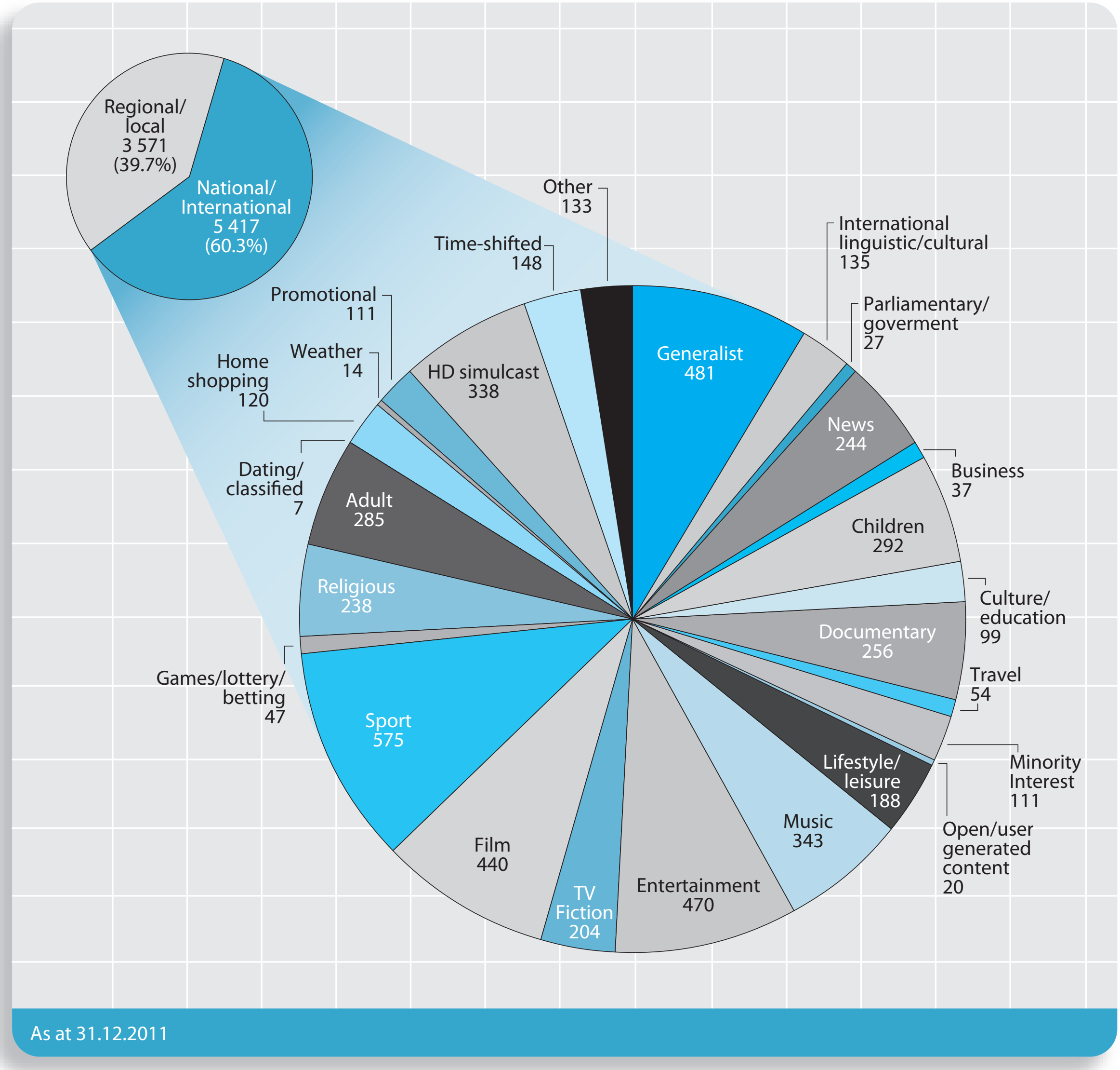
Die Erfassung erfolgt anhand von Listen der nationalen Regulierungseinrichtungen, aber auch über andere zugängliche Quellen, insbesondere die Website Lyngsat (http://www.lyngsat.com), die eine umfassende und regelmäßig aktualisierte Bestandsaufnahme der über die weltweite Satellitenflotte zugänglichen Hörfunk und Fernsehdienste bereitstellt.

Source: European Audiovisual Observatory

G.6.1

# TV channels by genre available in 30 European countries (European Union, Croatia, Turkey and "The former Yugoslav Republic of Macedonia")

December 2011 In units.




Note: This graph includes extra European channels available in Europe.

Source: European Audiovisual Observatory, MAVISE database

T.6.1

## TV channels by kind of transmission, available and established in the European countries

December 2011 In units.

| Country | Nationwide channels (with terrestrial licences) | | Other nationwide channels (Cable, satellite, IPTV, mobile) | | Regional or territorial channels | |
|---|---|---|---|---|---|---|
| | Public | Private | Public | Private | Public | Private |
| **AL** | 1 | 3 | 1 | 52 | 0 | 0 |
| **AT** | 3 | 5 | 4 | 45 | 0 | 5 |
| **BA** | 3 | 5 | 0 | 32 | 14 | 26 |
| **BE (CFR)** | 3 | 0 | 3 | 22 | 12 | 0 |
| **BE (DSG)** | 1 | 0 | 0 | 1 | 0 | 0 |
| **BE (VLG)** | 4 | 1 | 1 | 43 | 0 | 10 |
| **BE** 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| **BG** | 1 | 3 | 2 | 83 | 0 | 43 |
| **CH** | 8 | 0 | 4 | 33 | 0 | 0 |
| **CY** | 3 | 15 | 0 | 12 | 0 | 0 |
| **CZ** | 4 | 9 | 1 | 41 | 0 | 46 |
| **DE** | 11 | 20 | 9 | 192 | 10 | 29 |
| **DK** | 15 | 1 | 0 | 7 | 0 | 2 |
| **EE** | 3 | 6 | 1 | 3 | 0 | 0 |
| **ES** | 6 | 27 | 12 | 152 | 44 | 36 |
| **FI** | 6 | 29 | 0 | 16 | 0 | 4 |
| **FR** | 10 | 23 | 4 | 232 | 9 | 60 |
| **GB** | 27 | 67 | 1 | 483 | 1 | 19 |
| **GR** | 8 | 7 | 2 | 29 | 0 | 45 |
| **HR** | 4 | 8 | 2 | 27 | 0 | 0 |
| **HU** | 7 | 4 | 1 | 32 | 0 | 14 |
| **IE** | 7 | 2 | 2 | 5 | 0 | 4 |
| **IS** | 3 | 16 | 0 | 5 | 0 | 0 |
| **IT** | 14 | 79 | 6 | 335 | 1 | 94 |
| **LT** | 2 | 11 | 1 | 3 | 0 | 0 |
| **LU** | 0 | 5 | 1 | 6 | 0 | 0 |
| **LV** | 2 | 8 | 0 | 18 | 0 | 7 |
| **MK** | 3 | 5 | 1 | 19 | 0 | 54 |
| **MT** | 2 | 12 | 0 | 18 | 0 | 0 |
| **NL** | 3 | 10 | 21 | 81 | 15 | 1 |
| **NO** | 4 | 18 | 5 | 7 | 0 | 0 |
| **PL** | 5 | 6 | 5 | 59 | 0 | 1 |
| **PT** | 2 | 2 | 6 | 65 | 2 | 0 |
| **RO** | 2 | 2 | 5 | 107 | 0 | 14 |
| **RU** 2 | 6 | 9 | 3 | 61 | 0 | 0 |
| **SE** | 6 | 19 | 1 | 46 | 0 | 6 |
| **SI** | 3 | 4 | 1 | 48 | 3 | 7 |
| **SK** | 2 | 4 | 1 | 24 | 0 | 20 |
| **TR** | 6 | 23 | 4 | 96 | 0 | 18 |
| ***EUR 27*** | ***162*** | ***381*** | ***91*** | ***2 208*** | ***97*** | ***467*** |
| ***EUR 37*** | ***200*** | ***468*** | ***111*** | ***2 540*** | ***111*** | ***565*** |

1 The 46 channels counted for Belgium (Federal) are in reality the 23 versions of EbS and of EbS+, the European Commission TV services.

2 Data as at September 2006.

3 Estimation.

| Local stations and open channels (terr. or cable) | Windows | Channels targeting foreign countries | Total channels established in a country (windows not included) | Channels available in the country Total | Foreign |
|---|---|---|---|---|---|
| 71 | 3 | 1 | 129 | ~ | ~ |
| 69 | 10 | 4 | 135 | 390 | 259 |
| 0 | 0 | 0 | 80 | ~ | ~ |
| 0 | 1 | 0 | 40 | 423 | 382 |
| 0 | 0 | 0 | 2 | 420 | 418 |
| 0 | 0 | 5 | 64 | 522 | 463 |
| 0 | 0 | 46 | 46 | 0 | 0 |
| 11 | 0 | 0 | 143 | 298 | 155 |
| 69 | 0 | 2 | 116 | ~ | ~ |
| 1 | 0 | 4 | 35 | 191 | 160 |
| 42 | 0 | 68 | 211 | 327 | 184 |
| 89 | 46 | 38 | 398 | 567 | 207 |
| 128 | 45 | 4 | 157 | 375 | 222 |
| 4 | 0 | 0 | 17 | 319 | 302 |
| 560 | 26 | 30 | 867 | 955 | 118 |
| 39 | 0 | 1 | 95 | 286 | 192 |
| 101 | 24 | 131 | 570 | 823 | 383 |
| 23 | 40 | 738 | 1 359 | 659 | 38 |
| 90 | 0 | 12 | 193 | 293 | 112 |
| 40 | 20 | 1 | 82 | 217 | 136 |
| 514 | 6 | 3 | 575 | 778 | 200 |
| 3 | 0 | 0 | 23 | 486 | 463 |
| 0 | 0 | 1 | 25 | ~ | ~ |
| 499 | 20 | 50 | 1 078 | 1141 | 113 |
| 43 | 0 | 0 | 60 | 338 | 278 |
| 7 | 0 | 36 | 55 | 415 | 396 |
| 16 | 0 | 5 | 56 | 258 | 207 |
| 2 | 0 | 0 | 84 | 113 | 29 |
| 0 | 0 | 0 | 32 | 172 | 140 |
| 233 | 23 | 88 | 452 | 658 | 292 |
| 15 | 11 | 15 | 64 | ~ | ~ |
| 209 | 16 | 3 | 288 | 695 | 410 |
| 0 | 0 | 11 | 88 | 281 | 204 |
| 0 | 5 | 39 | 169 | 255 | 125 |
| 1 500 [3] | 12 | 6 | 1 585 | ~ | ~ |
| 74 | 29 | 104 | 256 | 321 | 169 |
| 26 | 0 | 0 | 92 | 283 | 191 |
| 6 | 0 | 0 | 57 | 232 | 175 |
| 198 | 0 | 4 | 349 | 445 | 100 |
| | | | | | |
| ***2 787*** | ***291*** | ***1 420*** | ***7 613*** | | |
| | | | | | |
| ***4 682*** | ***337*** | ***1 450*** | ***10 127*** | | |

Source: European Audiovisual Observatory, MAVISE database

T.6.2

## TV channels available in the European countries, by genre and by country

December 2011 In units. This table includes extra European channels available in Europe.

| Genre | AT | BE (CFR) | BE (DSG) | BE (VLG) | BG | CY | CZ | DE | DK | EE | ES | FI | FR | GB |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Adult** | 24 | 10 | 10 | 16 | 10 | 7 | 8 | 56 | 6 | 9 | 30 | 9 | 42 | 53 |
| **Business** | 2 | 5 | 4 | 6 | 4 | 2 | 2 | 4 | 2 | 3 | 5 | 2 | 5 | 3 |
| **Children** | 20 | 37 | 36 | 45 | 11 | 11 | 16 | 21 | 11 | 30 | 27 | 11 | 29 | 22 |
| **Film** | 18 | 22 | 22 | 22 | 14 | 8 | 19 | 18 | 25 | 21 | 17 | 28 | 48 | 40 |
| **Culture/Education** | 9 | 10 | 11 | 16 | 7 | 0 | 2 | 13 | 7 | 7 | 10 | 7 | 24 | 8 |
| **Dating** | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 3 |
| **Documentary** | 11 | 25 | 25 | 24 | 14 | 7 | 19 | 14 | 14 | 34 | 15 | 17 | 16 | 21 |
| **Entertainment** | 19 | 21 | 20 | 25 | 28 | 4 | 14 | 22 | 16 | 37 | 13 | 18 | 42 | 66 |
| **Fiction** | 9 | 10 | 10 | 11 | 9 | 5 | 11 | 9 | 2 | 11 | 18 | 4 | 9 | 14 |
| **Games** | 4 | 3 | 3 | 3 | 0 | 1 | 0 | 1 | 2 | 0 | 1 | 3 | 6 | 13 |
| **Generalist** | 44 | 37 | 35 | 43 | 35 | 15 | 31 | 50 | 40 | 24 | 20 | 21 | 75 | 17 |
| **HD simulcast** | 22 | 22 | 22 | 24 | 8 | 14 | 21 | 32 | 9 | 4 | 29 | 14 | 27 | 50 |
| **Home shopping** | 7 | 5 | 5 | 12 | 2 | 1 | 1 | 21 | 0 | 1 | 3 | 0 | 7 | 39 |
| **News** | 16 | 27 | 26 | 30 | 12 | 23 | 20 | 32 | 19 | 19 | 21 | 19 | 55 | 29 |
| **International cultural & linguistic** | 14 | 16 | 16 | 28 | 12 | 7 | 5 | 26 | 13 | 10 | 22 | 5 | 45 | 3 |
| **Lifestyle** | 9 | 18 | 18 | 19 | 10 | 4 | 9 | 17 | 2 | 10 | 14 | 4 | 21 | 17 |
| **Local** | 69 | 26 | 26 | 27 | 54 | 5 | 75 | 102 | 161 | 4 | 565 | 43 | 177 | 5 |
| **Minorities** | 4 | 7 | 6 | 7 | 1 | 0 | 1 | 12 | 7 | 1 | 4 | 0 | 21 | 27 |
| **Music** | 25 | 38 | 38 | 45 | 30 | 12 | 24 | 38 | 16 | 23 | 25 | 15 | 64 | 45 |
| **Parliamentary** | 0 | 1 | 1 | 1 | 0 | 1 | 0 | 5 | 1 | 0 | 2 | 0 | 2 | 1 |
| **Promotional** | 8 | 8 | 8 | 7 | 4 | 2 | 7 | 6 | 4 | 0 | 5 | 3 | 7 | 5 |
| **Religion** | 3 | 2 | 2 | 10 | 2 | 2 | 2 | 12 | 5 | 3 | 43 | 3 | 22 | 39 |
| **Sport** | 28 | 40 | 40 | 45 | 10 | 51 | 25 | 29 | 26 | 37 | 31 | 29 | 56 | 27 |
| **Travel** | 1 | 9 | 9 | 8 | 5 | 3 | 4 | 1 | 3 | 9 | 3 | 3 | 8 | 3 |
| **Time-shifted versions** | 2 | 4 | 4 | 4 | 1 | 0 | 0 | 3 | 0 | 0 | 12 | 0 | 10 | 67 |
| **User generated content** | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 |
| **Weather** | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 3 | 0 | 3 | 1 |
| **Windows** | 22 | 9 | 9 | 35 | 0 | 0 | 10 | 36 | 8 | 0 | 26 | 0 | 28 | 54 |
| **Others** | 6 | 5 | 5 | 6 | 8 | 0 | 2 | 8 | 2 | 5 | 4 | 6 | 14 | 11 |
| ***Total (windows included)*** | ***397*** | ***417*** | ***412*** | ***519*** | ***291*** | ***185*** | ***328*** | ***589*** | ***401*** | ***302*** | ***968*** | ***264*** | ***864*** | ***683*** |

No data available for Albania, Bosnia and Herzegovina, Iceland, Liechtenstein, Norway, the Russian Federation, Switzerland and "The former Yugoslav Republic of Macedonia".
Free to air channels on satellite have been counted only in their country of establishment, even if they are, in practice, available in most European countries.

| | GR | HR | HU | IE | IT | LT | LU | LV | MT | NL | PL | PT | RO | SE | SI | SK | TR |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 6 | 6 | 12 | 25 | 32 | 2 | 13 | 10 | 0 | 15 | 10 | 15 | 9 | 6 | 6 | 7 | 1 |
| | 2 | 4 | 1 | 2 | 6 | 3 | 5 | 2 | 2 | 2 | 5 | 3 | 2 | 3 | 3 | 2 | 4 |
| | 9 | 14 | 14 | 23 | 22 | 29 | 26 | 19 | 12 | 26 | 39 | 20 | 10 | 8 | 13 | 13 | 10 |
| | 4 | 7 | 17 | 32 | 36 | 19 | 13 | 27 | 6 | 14 | 26 | 18 | 21 | 23 | 12 | 12 | 14 |
| | 0 | 5 | 8 | 6 | 12 | 9 | 16 | 1 | 3 | 15 | 11 | 3 | 7 | 7 | 10 | 7 | 2 |
| | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 1 |
| | 5 | 12 | 17 | 16 | 9 | 37 | 13 | 23 | 11 | 20 | 42 | 13 | 13 | 16 | 13 | 14 | 14 |
| | 6 | 15 | 21 | 44 | 22 | 25 | 33 | 19 | 7 | 28 | 29 | 11 | 18 | 21 | 19 | 11 | 25 |
| | 3 | 9 | 9 | 12 | 16 | 9 | 8 | 9 | 3 | 7 | 21 | 13 | 12 | 3 | 9 | 8 | 7 |
| | 1 | 1 | 0 | 4 | 13 | 0 | 6 | 2 | 1 | 1 | 5 | 2 | 1 | 2 | 0 | 1 | 0 |
| | 12 | 25 | 29 | 14 | 27 | 25 | 51 | 18 | 20 | 43 | 34 | 18 | 21 | 32 | 49 | 36 | 48 |
| | 19 | 5 | 11 | 45 | 33 | 3 | 8 | 3 | 5 | 23 | 38 | 20 | 9 | 11 | 13 | 10 | 4 |
| | 1 | 0 | 1 | 27 | 21 | 0 | 9 | 0 | 3 | 2 | 3 | 1 | 2 | 0 | 1 | 1 | 6 |
| | 20 | 14 | 21 | 28 | 32 | 20 | 44 | 17 | 8 | 34 | 30 | 19 | 21 | 14 | 17 | 24 | 20 |
| | 5 | 4 | 6 | 3 | 16 | 9 | 22 | 5 | 5 | 25 | 18 | 18 | 6 | 13 | 5 | 5 | 7 |
| | 3 | 5 | 16 | 13 | 24 | 17 | 18 | 7 | 14 | 11 | 25 | 14 | 11 | 3 | 8 | 10 | 4 |
| | 139 | 22 | 528 | 8 | 630 | 42 | 31 | 23 | 0 | 254 | 217 | 4 | 19 | 55 | 48 | 29 | 212 |
| | 0 | 1 | 0 | 20 | 2 | 1 | 6 | 1 | 0 | 5 | 10 | 5 | 1 | 3 | 1 | 0 | 3 |
| | 8 | 13 | 24 | 35 | 23 | 20 | 21 | 18 | 18 | 36 | 22 | 19 | 20 | 12 | 20 | 16 | 22 |
| | 1 | 3 | 1 | 1 | 3 | 1 | 4 | 0 | 0 | 3 | 2 | 1 | 0 | 0 | 1 | 0 | 1 |
| | 1 | 3 | 0 | 1 | 5 | 3 | 5 | 0 | 0 | 6 | 6 | 4 | 4 | 10 | 2 | 3 | 1 |
| | 2 | 0 | 2 | 31 | 10 | 4 | 7 | 3 | 4 | 14 | 29 | 6 | 5 | 5 | 1 | 2 | 1 |
| | 38 | 19 | 22 | 27 | 70 | 34 | 31 | 26 | 36 | 29 | 48 | 36 | 24 | 35 | 15 | 11 | 22 |
| | 2 | 3 | 2 | 3 | 6 | 7 | 2 | 4 | 3 | 4 | 6 | 4 | 3 | 2 | 4 | 3 | 2 |
| | 0 | 0 | 0 | 52 | 37 | 0 | 3 | 4 | 2 | 1 | 1 | 0 | 0 | 0 | 0 | 0 | 0 |
| | 0 | 0 | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 14 | 0 | 0 | 1 |
| | 0 | 0 | 0 | 0 | 1 | 0 | 0 | 0 | 1 | 2 | 1 | 0 | 1 | 0 | 0 | 0 | 0 |
| | 0 | 20 | 6 | 2 | 21 | 0 | 19 | 0 | 0 | 39 | 17 | 0 | 5 | 30 | 0 | 0 | 1 |
| | 0 | 0 | 1 | 5 | 28 | 2 | 10 | 1 | 1 | 6 | 12 | 7 | 8 | 2 | 6 | 1 | 6 |
| | | | | | | | | | | | | | | | | | |
| | ***287*** | ***210*** | ***769*** | ***479*** | ***1157*** | ***321*** | ***425*** | ***242*** | ***165*** | ***665*** | ***708*** | ***274*** | ***253*** | ***330*** | ***276*** | ***226*** | ***439*** |

Source: European Audiovisual Observatory, MAVISE database

T.6.3

# Major international and national European news channels in terms of distribution December 2011

| Country of estab. | Media Group | Broadcasting company | Channels | Nb of channels | Statute | Distribution |
|---|---|---|---|---|---|---|
| **BE** | European Commission | European Commission | EbS Europe by Satellite / EbS+ Europe by Satellite (both 23 linguistic versions) | 46 | Public | Europe |
| **CZ** | CT Ceska Televizie | CT Ceska Televizie | CT24 | 1 | Public | AT, CZ, HU, NL, RO, SK |
| **DE** | Deutsche Welle | DW Deutsche Welle | Six versions of DW targetting world regions | 6 | Public | Worldwide |
| | ProSiebenSat.1 Media AG | N 24 Gesellschaft für Nachrichten und Zeitgeschehen mbH | N24 | 1 | Private | AT, BE, BG, EE, DE, FR, LT, LU, NL, RO, SK, SI |
| | RTL Group SA | n-tv Nachrichtenfernsehen GmbH | n-tv | 1 | Private | AT, BE, BG, HR, DE, EE, FI, FR, LT, LU, NL, RO, SK, SI, |
| | ARD | ARD | ARD EinsExtra | 1 | Public | AT, BE, DE, FR, LU, NL |
| | ZDF | Zweites Deutsches Fernsehen (ZDF) | ZDF Infokanal | 1 | Public | AT, BG, DE, FR, HR, LU, NL |
| **ES** | RTVE | Sociedad Mercantil Estatal Television Española S.A. | Canal 24 Horas | 1 | Public | AT, BE, BG, CZ, DE, EE, ES, FI, FR, IT, LT, LV, LU, NL, PL, PT, SK, SI, SE |
| **FR** | 21 public broadcasters | Euronews SA | Euronews (11 linguistic versions) | 11 | Public | Worldwide |
| | Audiovisuel extérieur de la France | France 24 | France 24 (in French, in English, in Arabic) | 3 | Public | Europe, Arab World |
| **GB** | Sheikh Hamad bin Thamer Al-Thani | Al Jazeera International Limited | Al Jazeera (in English and in Arabic) | 2 | Private | Worldwide |
| | BBC Group | BBC / BBC World service/ BBC World News Limited | BBC Arabic/ BBC News 24/ BBC Persian/ BBC World News | 4 | Public | Worldwide |
| | News Corporation | British Sky Broadcasting Limited | Sky News/ Sky News Ireland/ Sky News international | 3 | Private | Europe, Arab World |
| | News Corporation | Fox News Channel LLC | Fox News Channel | 1 | Private | FR, GB, GR, IS, IE, IT, NL, PT, SI, ES |
| | RIA Novosti | Information TV Ltd / European Television Guild Limited | Russia Today / Rusiya Al-Yaum | 2 | Private | Worldwide |
| | Chinese State / News Corp | Satellite Television Asian Region Ltd | CCTV News | 1 | Public | Worldwide |
| | Time Warner | Turner Broadcasting System Europe Limited | CNN International/ CNN Türk | 2 | Private | Worldwide |
| **HU** | Hír Televízió | | Hir TV | 1 | Private | CZ, HR, HU, RO, SK, RS, |
| **IT** | RAI | Rai - Radiotelevisione Italiana SP | Rai News / Rai Med | 2 | Public | AT, BE, BG, DK, DE, FR, IT, LT, LU, MT, PL, PT, RO, Arab World |
| **PL** | TVP | Telewizja Polska S.A. | TVP Info | 1 | Public | BE, CZ, DE, FR, LT, LU, NL, PL |
| **PT** | Rádio e Televisão, SGPS, S.A. | RTP | RTP N | 1 | Public | Europe, Africa, Brazil |
| | Sociedade Independente de Comunicaçao, S.A. (SIC) | | Sic Noticias | 1 | Private | Europe, Africa, Brazil |
| **SE** | SVT | Sveriges Television AB | SVT24 | 1 | Public | EE, DK, FI, LT, LV, NO, SE |
| **TR** | Dogus Group | NTV radyo ve televizyon Yayinciligi A.S. | NTV/ NTV Avrupa | 2 | Private | AT, BE, DE, NL, TR |
| | Ciner Group | Habertürk Televizyon Ve Radyo Yayinciligi AS | HaberTürk | 1 | Private | DK, FR, NL, TR |

Source: European Audiovisual Observatory, MAVISE database

T.6.4

# Major European documentary channels in terms of distribution
## December 2011

| Country [1] | Media Group | Broadcasting company | Channels [2] | Nb of channels [2] | Statute | Distribution |
|---|---|---|---|---|---|---|
| **CZ** | Film Europe | Film Europe | DOKU CS | 1 | Private | CZ, SK |
| | Liberty Global | Ceska Programova Spolecnost, S.R.O. | Spektrum TV (2) Spektrum TV HD (2) | 4 | Private | CZ, HU, SK |
| **DE** | AETN / NBC Universal | The History Channel (Germany) GmbH & Co. Kg | The History Channel/ Bio. The Biography Channel | 2 | Private | DE, AT, LU |
| | Discovery Communications | Dmax TV GmbH & Co. Kg | Animal Planet Deutschland/ Discovery Channel / Discovery HD | 3 | Private | DE, AT, CH, LU |
| | HV Fernseh-betriebs-GmbH | HV Fernsehbetriebs-GmbH | Planet | 1 | Private | DE, AT, LU |
| | Gruner + Jahr AG & Co. KG/ Bertelsmann AG | Spiegel GmbH | Spiegel Geschichte/ Spiegel TV Wissen/ Spiegel TV Wissen HD | 3 | Private | AT, DE, LU |
| | ZDF | Zweites Deutsches Fernsehen (ZDF) | ZDF Neo | 1 | Public | AT, BE, BG, CZ, DE, FR, HR, LU, NL, CH |
| **ES** | AETN / Liberty global | Multicanal Iberia SL | Bio. The Biography Channel (2)/ Canal de Historia (2)/ Odisea (2)/ Natura | 7 | Private | ES, PT |
| **FR** | Groupe AB | AB SAT | Animaux, Animaux (Turkey) | 2 | Private | CH, FR, BE, LU, PT, SI, TR |
| | Groupe AB | AB SAT | Encyclopedia (2) | 2 | Private | FR, BE, LU, PT, SI (and TR) |
| | Groupe AB | AB SAT | Toute l'Histoire | 1 | Private | FR, BE, LU, CH |
| | TF1 | Histoire SA | Histoire | 1 | Private | FR, BE, LU, CH |
| | VIVENDI | Planète Câble | Planète+/ Planète+ Justice / Planète+ No Limit | 3 | Private | CH, FR, BE, LU |
| **GB** | News Corporation | The History Channel (UK) | The History Channel (10) / The History Channel HD (5) / The Military History Channel /Bio. The Biography Channel / Bio.HD | 18 | Private | Europe |
| | BBC / Scripps Networks | UK Channel Management Ltd / UKTV New Ventures Ltd | Eden/ Eden HD/ Yesterday | 3 | Private | IE, UK |
| | Discovery Communications | Discovery Communications Europe Limited | Animal Planet (15) / Animal Planet HD (6) | 21 | Private | Europe |
| | Discovery Communications | Discovery Communications Europe Limited | Discovery Channel (23) / Discovery Science (16) / Discovery World (15) / Discovery HD (9) Discovery History (2) other (2) | >65 | Private | Europe |
| | MTG | Viasat Broadcasting UK Limited | Viasat Explorer (12) / Viasat History (11) / Viasat Nature East (6) Viasat Nature/ History HD (4) | >30 | Private | BG, BA, HR, CZ, DK, EE, FI, LV, LT, MK, NO, PL, RO, RU, SE, SI, SK, |
| | NGC / News Corporation | NGC Network (UK) Limited | National Geographic Channel Europe (22) / National Geographic HD (8) / Nat Geo Wild (12) / Nat Geo Wild HD (5) | >45 | Private | Europe |
| **IT** | News Corporation | Fox International Channels Italy Sarl | The History Channel (1) National Geographic (2) National Geographic HD (3) / Nat Geo Wild (2) / Nat Geo Adventure | 9 | Private | A, IT, DE, LU, BE, FR, MT, TR |
| **RO** | IKO ROMANIA SRL | IKO ROMANIA SRL | DoQ (3) | 3 | Private | CZ, HR, HU, RO, SK, SI |
| **SE** | Bonnier | TV4 AB | TV4 Fakta (2) | 2 | Private | SE, DK, FI, NO |
| | MTG | Viasat Pay Channels AB | Viasat Crime/ Nature (4) | 4 | Private | DK, FI, NO, SE |
| **TR** | Mars Televizyon Yayincilik | Mars Televizyon Yayincilik | İZ TV | 1 | Private | Turkey, France |

1 Country of establishment of the channels.

2 Number of linguistic versions in brackets. Time-shifted versions not included.

Source: European Audiovisual Observatory, MAVISE database

2 3 4 5 6 7 8 9

T.6.5

# European international linguistic and cultural channels
## December 2011

| Country ❶ | Media Group | Broadcasting company | Channels | Nb of channels | Statute | Distribution and potential audience ❷ |
|---|---|---|---|---|---|---|
| **AT** | ORF | ORF - Österreichischer Rundfunk | ORF 2 Europe | 1 | Public | AT, BE, BG, CZ, DE, HU, LU, NL, SK, SI |
| **BG** | BNT | Bulgarian National Television | BNT Sat | 1 | Public | BG, DE, FR, PT |
| **DE** | ProSiebenSat.1 media AG | ProSiebenSat.1 Welt AG | ProSiebenSat.1 Welt | 1 | Private | CA, FR, US |
| **ES** | Grupo Planeta de Agostini / RTL Group | Antena 3 De Television SA | Antena 3 Internacional | 1 | Private | South America |
| | RTVE | Sociedad Mercantil Estatal Television Española S.A. | TVE Internacional: America 1 & 2 / Asia & Africa / Europa | 4 | Public | Worldwide (450 million potential viewers) |
| **FI** | YLE | Yleisradio Oy | TV Finland | 1 | Public | Nordic Countries |
| **FR** | Audiovisuel extérieur de la France | TV5 Monde | Regional versions: Afrique / Amérique latine et Caraïbes / Asie / Europe / FBS / Orient / Pacifique / Québec Canada / USA + 12 subtitled versions | 20 | Public | Worldwide (200 countries / 220 million potential households) |
| **GR** | RTL Group | Alpha Satellite Television S.A. | Alpha Sat / Alpha Australia | 2 | Private | Worldwide |
| | Eleftheri Tileorassi | Eleftheri Tileorassi S.A. | Alter Globe | 1 | Private | North America, Australia |
| | Antenna TV | Antenna TV S.A. | ANT1 Satellite / Europe / Pacific/ Prime | 4 | Private | Europe, North America, Australia |
| | ERT | Greek Radio Television (ERT) S.A. | ERT World | 1 | Public | Worldwide |
| | Teletypos | Teletypos S.A. | MEGA Cosmos | 1 | Private | North America, Australia |
| **HR** | Hrvatska Radiotelevizija | Hrvatska Radiotelevizija | HRT-SAT | 1 | Public | Europe, North America, South America |
| | CME | Nova TV D.D. | Nova World | 1 | Private | US, Canada, New Zealand and Australia |
| **IT** | Mediaset S.P.A | RETI Televisive Italiane S.P.A. (R.T.I.) | Mediaset Italia International | 1 | Private | BE, DE, FR, RO |
| | RAI | RAI - Radiotelevisione Italiana SP | Raitalia 1 / 2 / 3 | 3 | Public | Worldwide (60 million potential viewers) |
| | RAI | RAI - Radiotelevisione Italiana SP | Yes Italia | 1 | Public | BE, IT, LU, MT, PL, PT |
| **LT** | LRT Lietuvos Radijas Ir Televizija | LRT Lietuvos Radijas Ir Televizija | LTV World | 1 | Public | DE, LV, LT, PL, SE, North America |
| **LU** | Dogan Group | Osmose Media SA | EURO D / EURO STAR | 2 | Private | DE, FR, BE, BG, DK, NL, TR, CH, AU |
| **NL** | NPO / VRT | BVN | BVN | 1 | Public | AT, BE,BG, FR, DE, NL, LU, MT, PL, PT, IT, Worldwide |
| **PL** | ITI Holdings | TVN SA | ITVN | 1 | Private | FR, DE, PL, AU, CA, US |
| | Telewizja Polsat S.A. | Telewizja Polsat S.A. | Polsat 2 | 1 | Private | AT, IS, PL, SE, US, Australia |
| | TVP | Telewizja Polska S.A. | TVP Polonia | 1 | Public | Europe, North America |
| **PT** | RTP | Rádio e Televisão de Portugal, SGPS, S.A. (RTP) | RTP International 4 regions: Africa / Internacional / America / Asia | 4 | Public | Worldwide (30 million households) |
| | Impresa | Sociedade Independente de Comunicaçao, S.A. (Sic) | SIC International | 1 | Private | FR, BE, LU, PT, Africa, Brazil |
| **RO** | CME | Pro TV SA | Pro TV International | 1 | Private | BG, CY, CZ, DE, ES, HR, HU, IT, PL, PT, RO, SE, SK, North America |
| | TVR | TVR - Televizunea Romania | TVR International | 1 | Public | AT, BE, BG, DE, FR, IT, LU, PL, PT, RO |
| **RU** | VGTRK | VGTRK | RTR Planeta | 1 | State | Europe, North America, Asia Pacific |
| | | Channel One - Perviy Kanal | Channel One Russia/ Perviy Kanal Europa | 1 | | Worldwide (250 million potential viewers) |
| **SE** | SVT | Sveriges Television AB | SVT World | 1 | Public | FI, Africa, Oceania, Asia |
| **TR** | Türkiye Radyo ve Televizyon Kurumu | Türkiye Radyo ve Televizyon Kurumu | TRT Arapça, TRT Türk, TRT Avaz | 3 | Public | Arab World, Europe, Central Asia |

❶ Country of establishment of the channels.

❷ Distribution information from MAVISE, and data on potential viewers/ households from the channels websites.

Source: European Audiovisual Observatory, MAVISE database

T.6.6

## Major European children's channels
December 2011

| ❶ Country | Media Group/ Groups | Broadcasting company | Channels ❷ | Nb of ❷ channels | Statute | Distribution |
|---|---|---|---|---|---|---|
| **BE** | VRT | VRT - De Vlaamse Radio- En Televiseomroep | Ketnet / Canvas, Ketnet / Canvas HD, Ketnet+ / Canvas+ | 6 | Public | BE, LU, NL |
| **CZ** | | Československá filmová společnost, s.r.o. | CS Mini | 1 | Private | CZ, SK |
| | Liberty Global | Chello Central Europe, S.R.O. | Minimax (2) | 3 | Private | BA, CZ, HU, MK, SI, SK |
| | Viacom INC | MTV Networks s.r.o. | Nickelodeon (4) Nickelodeon HD Europe | 5 | Private | BG, CZ, EE, HU, MK, PL, RO, SK |
| | The Walt Disney Company | Jetix Europe Channels B.V. | Disney Channel (7) | 7 | | AL, BA, BG, CZ, HU, RO, RU, SK, SI |
| **DE** | ARD | KIKA | KIKA | 1 | Public | AT, BG, CH, CZ, DE, EE, FR, HR, HU, LT, LU, NL, SI, SK |
| | EM TV Merchandising & Aktiengesellschaft | Junior TV GmbH | Junior | 1 | Private | AT, CH, DE, LU |
| | RTL Group/ Walt Disney Company | Super RTL Disney Fernsehen GmbH | Super RTL (Super RTL Österreich, Super RTL Schweiz) | 3 | Private | AT, BE, BG, CH, CZ, DE, DK, EE, FI, FR, HR, HU, LT, LV, LU, NL, PL, PT, RO, SK, SI |
| | Sony Pictures Television International | Sony Pictures Television International Deutschland GmbH | Animax Deutschland | 1 | Private | AT, DE, NL |
| | | RTVD Video- und Filmproduktions GmbH | Detski Mir | 1 | Private | BG, DE, EE, FR, LT, LV, RU |
| | Viacom INC | MTV Networks Germany GmbH | Nickelodeon, Nicktoons, Nick (Austria), Nick junior | 4 | Private | AT, BE, CH, DE |
| | The Walt Disney Company | The Walt Disney Company | Disney Channel Germany, Disney XD, Disney Junior | 3 | Private | AT, HR, DE, LU, SI |
| | Turner Broadcasting System Deutschland GmbH | Time Warner Inc. | Cartoon Network (1) Boomerang (1) | 2 | Private | AT, DE |
| **ES** | The Walt Disney Company | The Walt Disney Company Iberia S.L. | Disney Channel (2) Disney XD, Disney Junior | 4 | Private | ES, PT |
| **FR** | Groupe Canal+ SA | Groupe Canal+ SA | Piwi+, Télétoon | 2 | Private | BE, FR, Africa, Madagascar |
| | GROUPE AB SA | AB SAT | Mangas | 1 | Private | BE, FR, LU, SI |
| | Lagardere | CANAL J | Canal J, Tiji | 2 | Private | BE, BA, FR, HR, LU, PT, SI |
| | Lagardere/ France Télévisions | JEUNESSE TV | Gulli, Gulli Russia | 2 | Mixed | BE, CH, FR, LU, LV, RU |
| | The Walt Disney Company | The Walt Disney Company France SA | Disney XD France, Disney Channel France, Disney Junior France | 3 | Private | BE, FR |
| **GB** | British Broadcasting Corporation | BBC | CBBC, Cbeebies (2) | 3 | Public | BE, GB, IE, LU, NL, PL |
| | BFTV Ltd | BFTV Ltd | Baby First (6) | 6 | Private | DE, ES, FR, GB, HU, MK, PL, PT, SI,TR |
| | CSC Media Group Ltd | CSC Media Group Ltd | Tiny Pop, Pop!, Pop Girl! | 3 | Private | BE, CZ, GB, IE, LU |
| | Liberty Global | JIMJAM Television Ltd | JimJam (15) | 15 | Private | AT, BA, BE, BG, CY, CZ, DE, GR, HR, HU, IT, LT, LV, MT, NL, PL, PT, RO, RU, SI, SK, TR, |
| | NBC UNIVERSAL | KIDSCO Ltd | Kidsco (12) | 12 | Private | BE, CY, DE, ES, FR, GR, HR, HU, LT, LU, MK, MT, PL, PT, RO,RU, SI, SK, TR |
| | News Corporation | Baby Network Ltd | Baby TV (11) | 11 | Private | AT, BE, BG, CZ, DE, EE, ES, FR, GB, GR, HR, HU, IS, LV, LT, MT, RO, SK, SI, NL, PL, TR, UK |

T.6.6

# Major European children's channels (Continued)
## December 2011

| Country ❶ | Media Group/ Groups | Broadcasting company | Channels ❷ | Nb of ❷ channels | Statute | Distribution |
|---|---|---|---|---|---|---|
| **GB** (Continued) | The Walt Disney Company | The Walt Disney Company Ltd | Disney Cinemagic (6), Disney XD (11) Disney Junior (8) Disney Channel (15) HD simulcasts (5) | >40 | Private | BA, BG, DK, EE, ES, FI, GB, GR, HR, HU, IE, LT, LV, MT, NO, PL, PT, SE, SI, SK, TR |
| | Viacom INC | Nickelodeon International Ltd/ Nickeloden UK Ltd | Nickelodeon (6), Nickelodeon Junior (8) Nicktoons | 15 | Private | BE, FR, GB, GR, IE, PT, RU, |
| | Turner Broadcasting International Ltd. | Time Warner Inc. | Boomerang Europe (19), Cartoon Network (17) Catoonito (1) Cartoon Two (1) | 38 | Private | AL, BE, CZ, DK, EE, ES, FI, FR, HR, HU, IE, GB, MK, NO, PL, PT, RO, RS, RU,SE, SI,SK, LT, LU, LV, TR, |
| **IT** | Mediaset S.P.A./ Time Warner INC | BOING S.P.A. | Boing TV (2) | 2 | Private | IT, FR |
| | RAI | RAI - Radiotelevisione Italiana SP | RAI Gulp, RAI Yoyo | 2 | Public | BE, IT, LU, PL |
| | Time Warner INC | Turner Entertainment Networks International Ltd | Boomerang Italia, Cartoon Network Italia | 2 | Private | IT |
| | Viacom INC | Viacom Networks Italia | Nickelodeon Italia, Nick Junior Italia | 2 | Private | IT |
| | The Walt Disney Company | The Walt Disney Company Italia SPA | Disney Channel Italia, Disney Channel Mobile Italia, Disney in English, Disney Junior, Disney XD | 5 | Private | IT |
| **LV** | SIA Voxell Baltic | SIA Voxell Baltic | 4 multimania (4) | 4 | Private | EE, LT, LV, RU |
| **NL** | Viacom INC | MTV Networks B.V. | Nick Hits, Nicktoons, Nick Junior (2), Nickelodeon (5) Kindernet | 10 | Private | BE, DK, FI, NL, NO, SE |
| | The Walt Disney Company | Jetix Europe Channels B.V. | Disney Channel Nederland, Disney XD | 2 | Private | BE, NL |
| **PT** | Liberty Global | DREAMIA - Serviços de Televisão, S.A. | Canal Panda (2), Panda Biggs TV | 3 | Private | ES, PT |
| **SE** | Sveriges Television AB | STV | SVTB | 1 | Public | EE, DK, FI, LT, LV,NO, SE |
| **SK** | Mega Max Media s.r.o | Mega Max Media s.r.o | Duck TV, Duck TV HD | 2 | Private | AT, BE, BG, CY, CZ, DE, EE, HR, HU, LT, LU, MK, MT, NL, PL, RO, RS, SK, SI, TR |
| **TR** | Türkiye Radyo ve Televizyon Kurumu | TRT | TRT Çocuk | 1 | Private | FR, TR |

❶ Country of establishment of the channels.

❷ Number of linguistic versions in brackets. Time-shifted versions not included.

Source: European Audiovisual Observatory, MAVISE database

# HDTV channels

Despite the continued growth in sales of HDTV ready television sets, the take-up of HDTV is more accurately reflected in the number of households with relevant HD set top boxes, and/or subscriptions to services. In the UK the Sky+ HD service claimed 5 million subscribers by the end of 2011 (50% of all subscribers). The Polish operator Cyfrowy Polsat claimed 1 million subscribers to its HD services at the beginning of 2011, and Sky Deutschland claimed 974 000 customers for the premium HD service at the end of 2011 (in both cases about 30% of customers). Freeview, the DTT operator in the UK claimed 3 million homes were availing of its HD services in 2011.

Regarding distribution, in 2011 satellite packages offered more than 50 HD channels in Italy, Poland, the UK and Ireland, and more than 30 in Germany, France and the Netherlands (table T.5.10). At the end of 2011, more than 30 HD channels were made available in IPTV packages in Switzerland, Poland, Portugal and the Netherlands (table T.5.18). HD channels are available on DTT networks in eighteen countries (compared to just three in 2009). With the digitisation of cable networks (36% digital in the EU at the end of 2010) more HD channels are appearing. The strongest HD offers on cable are available in Portugal (more than 40 channels), the Netherlands and Germany (more than 30 channels).

According to the MAVISE database, at the end of 2011 there were approximately 612 HD channels available in Europe [1] compared with 423 at the end of 2010. This figure includes both HD specific channels and simulcasts of standard definition channels. Sport remains the most important genre in HD television (approximately 20% of HD channels), followed by film, generalist and documentary channels. Public service broadcasters have launched HD simulcast or HD specific channels in 22 of the 27 EU Member States, and in Croatia, Norway, Russia and Turkey (representing 12% of the total HD channels). There are an estimated 20 3D channels broadcasting (or testing) in Europe, and most of these belong to the major satellite distribution platforms such as Sky (UK, Italy and Germany), Viasat (Nordic States), Canal+ (Spain), Nova (Greece), NTV Plus (Russia), Cyfra + (Poland), and D-Smart (Turkey). 3D services have also emerged on cable services such as Telenet (Belgium), Numéricable (Luxembourg), and on IPTV services such as Meo (Portugal), Orange (France), T-Entertain (Germany) and Belgacom (Belgium). Such channels tend to provide a mix of content such as sport, films and special events.

# Chaînes en HD

Malgré la croissance continue des ventes de téléviseurs HD Ready, le nombre de foyers équipés de décodeurs HD appropriés et/ou d'abonnements à ces services reflète mieux le degré d'adoption de la HDTV. Au Royaume-Uni, le service Sky+ HD annonçait 5 millions d'abonnés fin 2011 (50 % de l'ensemble des abonnés). Début 2011, l'opérateur polonais Cyfrowy Polsat revendiquait 1 million d'abonnés à ses services HD et Sky Deutschland revendiquait 974 000 clients pour le service Premium HD fin 2011 (dans les deux cas, environ 30 % des clients). Freeview, l'opérateur TNT britannique, annonçait 3 millions de foyers pour ses services HD en 2011.

En ce qui concerne la distribution, en 2011 les bouquets satellitaires proposaient plus de 50 chaînes HD en Italie, en Pologne, au Royaume-Uni et en Irlande, et plus de 30 en Allemagne, en France et aux Pays-Bas (tableau T.5.10). Fin 2011, plus de 30 chaînes HD étaient disponibles dans des bouquets IPTV en Suisse, en Pologne, au Portugal et aux Pays-Bas (tableau T.5.18). Les chaînes HD sont disponibles sur les réseaux TNT dans 18 pays (contre 3 en 2009). Avec la progression de la numérisation des réseaux câblés (36 % fin 2010 dans l'Union européenne), de plus en plus de chaînes HD font leur apparition. Les principales offres HD par câble sont disponibles au Portugal (plus de 40 chaînes), aux Pays-Bas et en Allemagne (plus de 30 chaînes).

Selon la base de données MAVISE, fin 2011, environ 612 chaînes HD sont diffusées en Europe [1], contre 423 fin 2010. Ce nombre comprend les chaînes HD spécifiques et les diffusions simultanées de chaînes en définition standard. Le sport reste le genre le plus important pour la télévision HD (environ 20 % des chaînes HD), suivi par les chaînes de cinéma, généralistes et de documentaires. Les radiodiffuseurs de service public ont lancé des chaînes HD ou de diffusion simultanée en HD dans 22 des 27 Etats membres de l'UE ainsi qu'en Croatie, en Norvège, en Russie et en Turquie (soit 12 % du nombre total de chaînes HD). Environ 20 chaînes 3D sont diffusées (ou testées) en Europe ; la plupart appartiennent aux grandes plates-formes de distribution par satellite telles que Sky (Royaume-Uni, Italie et Allemagne), Viasat (pays nordiques), Canal+ (Espagne), Nova (Grèce), NTV Plus (Russie), Cyfra + (Pologne) et D-Smart (Turquie). Des services 3D sont également apparus sur les services câblés tels que Telenet (Belgique), Numéricable (Luxembourg) et sur les services IPTV comme Meo (Portugal), Orange (France), T-Entertain (Allemagne) et Belgacom (Belgique). Ces chaînes proposent généralement un contenu varié incluant des films et des événements sportifs et spéciaux.

# *HD-Dienste*

Der Erfolg des HD-Fernsehens spiegelt sich trotz steigender Verkaufszahlen von HD-Ready-Fernsehern deutlicher in der Anzahl der Haushalte wider, die über einen HD-Decoder verfügen und/oder HD-Dienste abonniert haben. In Großbritannien hatte Sky+ HD Ende 2011 nach eigenen Angaben 5 Mio. Abonnenten (50 % aller Abonnenten). Der polnische Betreiber Cyfrowy Polsat hatte Anfang 2011 nach eigenen Angaben eine Million Abonnenten für seine HD-Dienste, während Sky Deutschland Ende 2011 974 000 Kunden für seinen Premium-HD-Dienst verzeichnete (jeweils ca. 30 % der Kunden). Der britische DVB-T Betreiber Freeview gibt an, dass seine HD-Dienste 2011 von drei Mio. Haushalten genutzt wurden.

Über Sat-TV-Pakete wurden 2011 über 50 HD-Kanäle in Italien, Polen, Großbritannien und Irland angeboten. Über 30 waren es in Deutschland, Frankreich und den Niederlanden (Tabelle T.5.10). Über IPTV-Pakete wurden 2011 über 30 HD-Kanäle in der Schweiz, Polen, Portugal und den Niederlanden angeboten (Tabelle T.5.18). Über DVB-T wurden in 18 Ländern HD-Kanäle ausgestrahlt (gegenüber drei 2009). Mit der Digitalisierung der Kabelnetze (EU-weit 36 % bis Ende 2010) nimmt auch die Zahl der HD-Kanäle zu. Am höchsten ist das HD-Angebot über Kabel in Portugal (über 40 Kanäle), den Niederlanden und Deutschland (über 30).

Laut MAVISE-Datenbank gab es Ende 2011 in Europa [1] ca. 612 HD-Kanäle, gegenüber 423 Ende 2010. Diese Zahl umfasst sowohl spezielle HD-Sender als auch HD-Simulcast-Versionen bestehender Sender in Standardauflösung. Wichtigstes Genre im HD-Fernsehen ist nach wie vor Sport (ca. 20 % der HD-Kanäle), gefolgt von Film, Vollprogramm und Dokukanälen. Die öffentlich-rechtlichen Sender haben in 22 der 27 EU-Mitgliedstaaten sowie in Kroatien, Norwegen, Russland und der Türkei HD-Simulcasts oder spezielle HD-Kanäle gestartet (12 % aller HD-Kanäle). In Europa werden bereits geschätzt 20 3D-Kanäle betrieben (oder getestet), die meisten von großen Satellitenplattformen wie Sky (Großbritannien, Italien, Deutschland), Viasat (nordische Länder), Canal+ (Spanien), Nova (Griechenland), NTV Plus (Russland), Cyfra+ (Polen) und D-Smart (Türkei). Angeboten werden 3D-Dienste auch über Kabel, darunter Telenet (Belgien) und Numéricable (Luxemburg) sowie über IPTV, z.B. Meo (Portugal), Orange (Frankreich), T-Entertain (Deutschland) und Belgacom (Belgien). Das Programm dieser Kanäle besteht üblicherweise aus einer Mischung aus Sport, Film und speziellen Veranstaltungen.

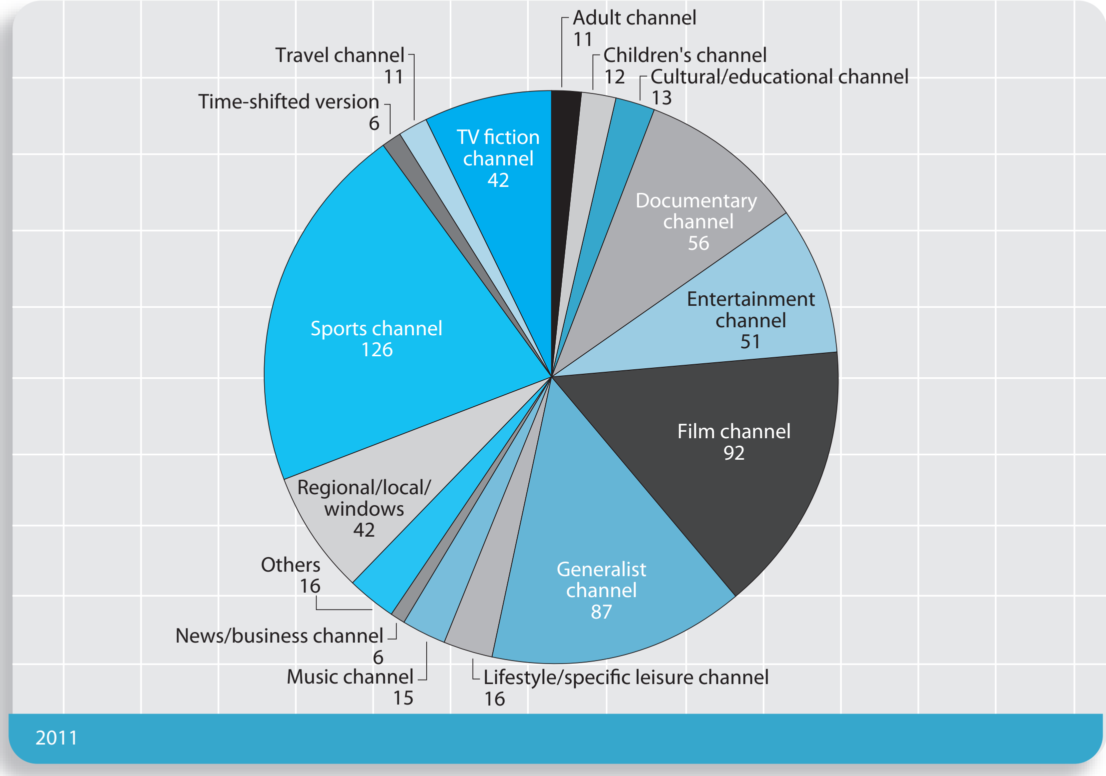
[1] MAVISE countries: EU, Croatia "The Former Yugoslav Republic of Macedonia" and Turkey

Source: European Audiovisual Observatory

G.6.2

## HD channels available in Europe by genre

December 2011 In units.

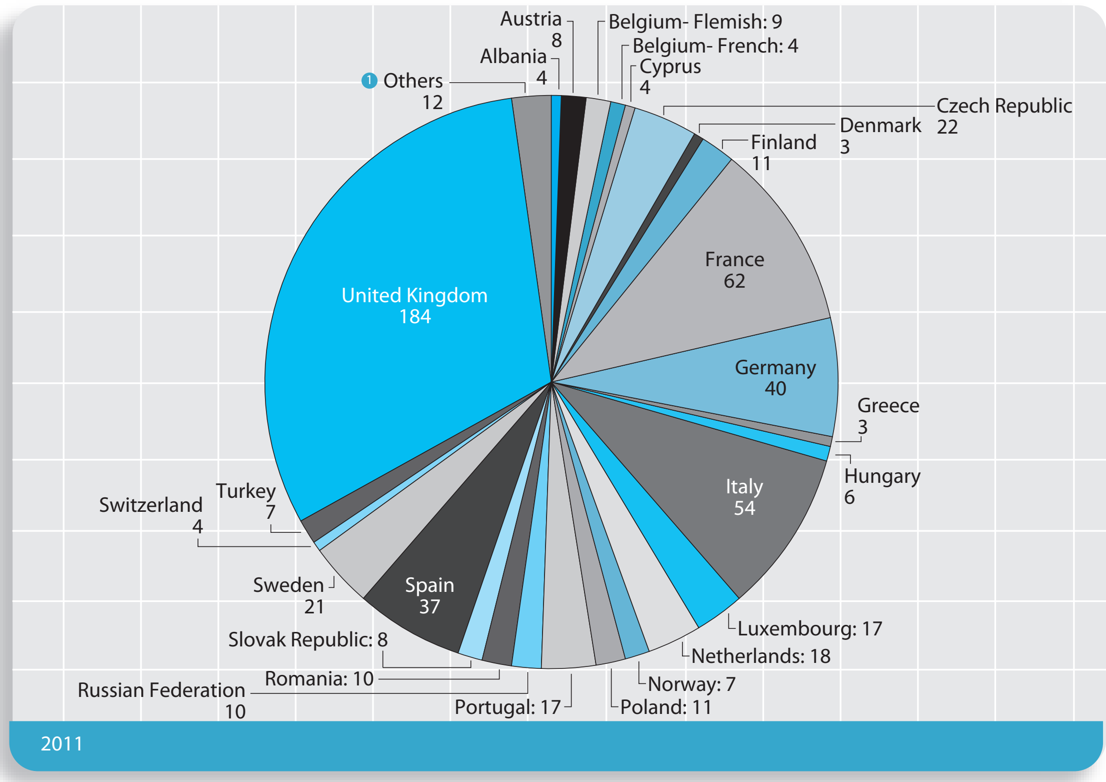



Source: European Audiovisual Observatory, MAVISE database

G.6.3

## HD channels established in Europe by country of origin

December 2011 In units.




1 Also includes 1-2 channels in Bulgaria, Croatia, Estonia, Iceland, Ireland, Malta, Slovenia and „The Former Yugoslav Republic of Macedonia".

Source: European Audiovisual Observatory, MAVISE database

T.6.7

# Online TV and radio services
## March 2012

| Country | Live stream TV ❶ | Live stream radio ❷ | Publishers of Live TV applications for smartphones or tablets (iPhone, iPad, Android) ❸ | Live Radio |
|---|---|---|---|---|
| **AL** | 11 | 10 | | |
| **AT** | 8 | 37 | ORF | |
| **BA** | 7 | 14 | | |
| **BE** | 5 | 85 | Belgacom, Telenet | RTBF, RTL Belgium |
| **BG** | 15 | 39 | BGTV, Gordimy TV | Radio 1 |
| **CH** | 9 | 66 | | SRS SSR Idée suisse |
| **CY** | | 25 | | ANT1 FM, Kiss89, Mix FM, Sfera 96.8 |
| **CZ** | 6 | 87 | Ocko TV | |
| **DE** | 64 | 189 | Sky Deutschland | ARD, RTL New Media |
| **DK** | 11 | 44 | | Razvan Creanga |
| **EE** | 5 | 26 | | |
| **ES** | 60 | 105 | Aragon TV, CCRTV, RTVE, RTVV | Antena 3,Cadena Ser, Canal Sur, Catalunya Radio, RNE |
| **FI** | 3 | 9 | | |
| **FR** | 51 | 173 | ARTE, Direct 8, E-NRJ, Euronews, Eurosport, France 24, Lagardere active, Nextradio TV, Canal Plus, TF1, TV5 Monde | Lagardere Active, Radio Classique, Radio France, RTL |
| **GB** | 78 | 563 | BBC Worldwide, BskyB, Livestation | |
| **GR** | 26 | 93 | Skai | |
| **HR** | 4 | 30 | | |
| **HU** | 31 | 61 | | |
| **IE** | 6 | 65 | | RTE |
| **IS** | 4 | 13 | | |
| **IT** | 91 | 99 | RAINet; Sky Italia, Telecom Italia | RAINet, RTL 102.5, Antenna1, Virgin Radio Italia |
| **LI** | 1 | 1 | | |
| **LT** | 3 | 19 | | |
| **LU** | 2 | 10 | | |
| **LV** | 4 | 20 | | |
| **MK** | 6 | 7 | | |
| **MT** | 3 | 18 | | Digital Minds, Velestar |
| **NL** | 23 | 217 | Omroep Gelderland, Omroep Zeeland, Sport1, RTV Nord | Momac N.V., NPO, VPRO |
| **NO** | 12 | 81 | NRK | NRK |
| **PL** | 15 | 108 | HBO Polska | |
| **PT** | 14 | 58 | Bliss Application | Radio Renascenca |
| **RO** | 41 | 68 | B1 TV, TVR Info | |
| **RU** | 46 | 63 | | RadioENERGY, VietDorje |
| **SE** | 21 | 94 | TV24 Group AB | SR |
| **SI** | 3 | 52 | | |
| **SK** | 6 | 48 | | |
| **TR** | 155 | 29 | ATV, Digiturk WebTV, Haberturk, Samanyoluhaber, Show TV, StarTV, TRT, Yumurcak TV | Shaber, TGRT |
| ***EUR 27*** | ***595*** | ***2 412*** | | |
| ***EUR 37*** | ***850*** | ***2 726*** | | |

❶ Based on the directory of links provided by Lyngsat Stream.

❷ Based on the directory of links provided by Live Radio Net.

❸ Based on a systematic browsing on iTunes Store. As iTunes Store does not provide an entry TV or Radio, various applications may have not been identified.

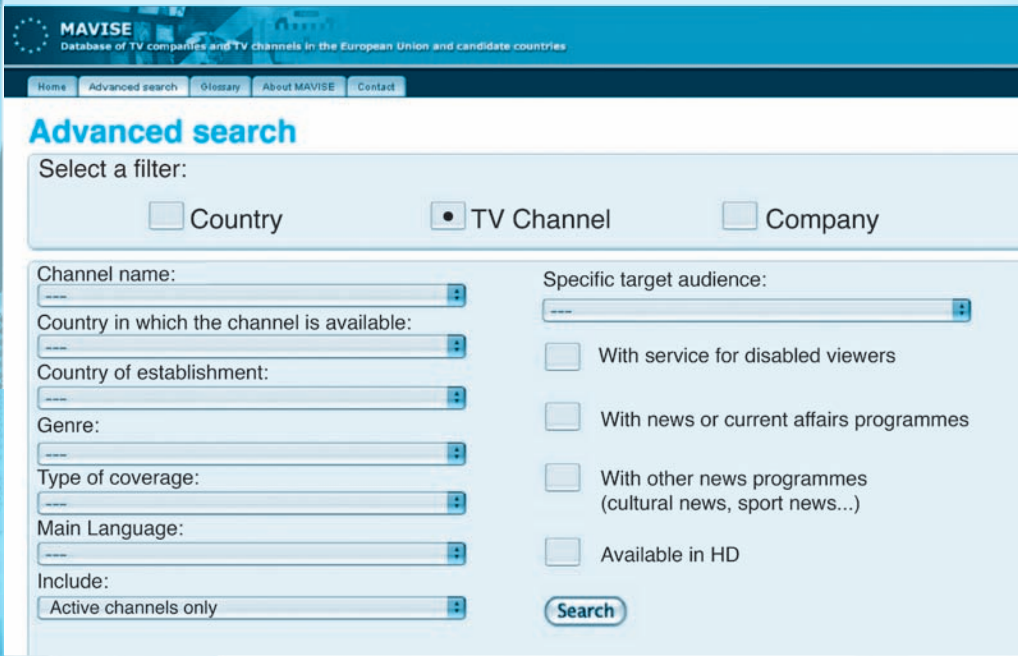
We have not surveyed applications available in the Google Play Store (formerly Android Market Store) but in general applications from TV companies for iPhone or iPad are also available in the Android format. Some channels are available only through platform applications listed in the T.5.30

Source: European Audiovisual Observatory

# MAVISE

http://mavise.obs.coe.int

DATABASE OF TV COMPANIES AND TV CHANNELS IN THE EUROPEAN UNION AND CANDIDATE COUNTRIES




# The European Television Database

European Commission

Directorate-General Communication

OBSERVATOIRE EUROPÉEN DE L'AUDIOVISUEL
EUROPEAN AUDIOVISUAL OBSERVATORY
EUROPÄISCHE AUDIOVISUELLE INFORMATIONSSTELLE

## Company Listings

- by country
- by type of services offered
- by type of operator: cable, IPTV, etc.

## TV Market Profiles

- Description of the TV market
- Licensing authorities
- Data on population and equipment
- List of channels available and national companies

## TV Channel Profiles

- Genre and programming concept
- Countries and audience targeted
- Related licensing authority
- List of platforms carrying each channel

## TV Company Profiles

- Address and link to website
- List of main activities
- Ownership information
- List of channels owned by each company

Chapter
Chapitre
*Kapitel*
7

# On-demand audiovisual services

# Services audiovisuels à la demande

# *Audiovisuelle Abrufdienste*

# On-demand audiovisual services

In this chapter, we provide a new set of tables on on-demand audiovisual services. The term "on-demand audiovisual service" is to be understood in a wider sense than "on-demand media service" (OD AVMS), as defined in the European Audiovisual Media Services Directive. The legal definition provided by the Directive establishes various criteria for an offering to be recognised as an OD AVMS:

- the service must enable the user to view the service at the time of his/her choosing and on individual demand;
- there must be a service available, that is to say an offering normally provided against payment;
- the service must be under the editorial control of an audiovisual media service provider;
- the service is provided on the basis of a catalogue of programmes selected by the media services provider;
- the purpose of the service must be to inform, entertain or educate the general public;
- the principal purpose of the service must be to supply audiovisual programmes;
- the service must be supplied by electronic communications networks.

There can be no question here of discussing the definition provided by the Directive or how it is transposed by states into domestic law and interpreted by regulatory bodies responsible for monitoring its implementation. However, it should be pointed out that it is generally accepted that:

- NVoD services (which entail the viewer watching a programme transmitted at a time chosen by the service provider) do not constitute on-demand audiovisual media services but television services;
- video-sharing platforms, such as YouTube or Dailymotion, do not constitute OD AVMSs as their operators do not have editorial control;
- by contrast, the "channels" offered by commercial operators on these platforms may, under certain conditions, be described as on-demand audiovisual media services;
- Newspaper websites with news videos are not OD AVMSs as the use of videos is only subsidiary to the publication of texts.

In connection with the implementation of the Directive, the majority of regulatory authorities are beginning to draw up lists of services that fall within their remit (T.7.1.), in most cases following the establishment of a declaratory system for on-demand audiovisual services, but it needs to be pointed out that their approaches and their understanding of the definition vary considerably and that their data are often incomplete.

# Services audiovisuels à la demande

Nous proposons dans ce chapitre une nouvelle série de tableaux sur les services audiovisuels à la demande. La notion de « service audiovisuel à la demande » est à prendre ici dans un sens plus large que la notion de « service de média audiovisuel à la demande » (SMAD), tel que défini dans la Directive européenne sur les services de médias audiovisuels. La définition juridique proposée par la Directive suppose différents critères pour qu'une offre soit reconnue comme SMAD :

- Le service doit permettre le visionnement par l'utilisateur du service au moment qu'il choisit et sur demande individuelle.
- Il doit y avoir un service, donc une offre fournie normalement contre rémunération.
- Le service doit être sous le contrôle éditorial d'un fournisseur de service de média audiovisuel.
- Le service est fourni sur la base d'un catalogue de programmes sélectionnés par le fournisseur de services de médias.
- L'objectif du service doit être d'informer, de divertir ou d'éduquer le public en général.
- L'objectif principal du service doit être de délivrer des programmes audiovisuels.
- Le service doit être délivré par des réseaux de communication électronique.

Il ne peut être question ici de discuter les détails de la définition proposée par la Directive ni la manière dont cette définition a été transposée en droit national par les Etats et dont elle est interprétée par les instances de régulation qui ont en charge le *monitoring*. On retiendra cependant qu'il est généralement admis que :

- Les services de NVoD (qui supposent que le spectateur regarde un programme dont l'heure de diffusion relève du choix du fournisseur de service) ne constituent pas des services de média audiovisuels à la demande mais des services de télévision.
- Les plates-formes de partage vidéo (de type YouTube ou Dailymotion) ne constituent pas des SMAD car les opérateurs de ces plates-formes n'ont pas le contrôle éditorial.
- A l'inverse les « chaînes » proposées par des opérateurs commerciaux sur ces plates-formes peuvent être qualifiées, sous certaines conditions, de services de médias audiovisuels à la demande.
- Les sites de journaux présentant des vidéos d'actualité ne sont pas des SMAD dès lors que l'usage de vidéos n'est qu'accessoire par rapport à la publication de textes.

La plupart des instances de régulation commencent, dans le cadre de la mise en œuvre de la Directive, à établir des listes de services qui relèvent de leur compétence (T.7.1.), établies le plus souvent suite à la mise en place d'un régime déclaratif des services audiovisuels à la demande, mais force est de constater que leurs approches et leur compréhension de la définition restent très différentes et leurs relevés souvent incomplets.

# *Audiovisuelle Abrufdienste*

Dieses Kapitel enthält eine neue Serie von Tabellen über die audiovisuellen Abrufdienste. Der Begriff des „audiovisuellen Abrufdienstes" ist hier weiter gefasst als der des „audiovisuellen Mediendienstes auf Abruf", wie er in der europäischen Richtlinie über audiovisuelle Mediendienste definiert ist. Die Legaldefinition in der Richtlinie nennt verschiedene Kriterien für die Anerkennung eines Angebots als „audiovisueller Mediendienst auf Abruf":

- Der Dienst muss dem Nutzer den Empfang zu dem von ihm gewählten Zeitpunkt auf individuellen Abruf hin ermöglichen.
- Es muss sich um ein üblicherweise gegen Entgelt bereitgestelltes Angebot handeln.
- Der Dienst muss von einem Anbieter audiovisueller Mediendienste redaktionell kontrolliert werden.
- Grundlage des Dienstes ist ein Programmkatalog, der vom Anbieter der Mediendienste zusammengestellt wird.
- Zweck des Dienstes muss die Information, Unterhaltung oder Bildung der breiten Öffentlichkeit sein.
- Der Hauptzweck des Dienstes muss die Bereitstellung von audiovisuellen Programmen sein.
- Der Dienst muss über elektronische Kommunikationsnetze bereitgestellt werden.

An dieser Stelle können weder die Einzelheiten der Definition in der Richtlinie noch die Art der Umsetzung dieser Definition durch die Mitgliedstaaten in nationales Recht noch die Auslegung durch die für die Kontrolle zuständigen Regulierungsbehörden erörtert werden. Allerdings besteht grundsätzlich Einigkeit darüber, dass:

- die NVoD-Dienste (die den Zuschauern ein Programm zu einem vorher vom Betreiber des Dienstes festgelegten Sendeplan anbieten) keine „audiovisuellen Mediendienste auf Abruf", sondern Fernsehdienste sind;
- die Plattformen für „Video Sharting" (vom Typ YouTube oder Dailymotion) nicht zu den „audiovisuellen Mediendiensten auf Abruf" zählen, da ihre Betreiber keine redaktionelle Kontrolle über die Inhalte ausüben;
- die „Kanäle" kommerzieller Betreiber auf diesen Plattformen dagegen unter bestimmten Bedingungen als „audiovisuelle Mediendienste auf Abruf" bezeichnet werden können;
- die Internetauftritte von Zeitungen mit aktuellen Videobeiträgen dann keine „audiovisuellen Mediendienste auf Abruf" sind, wenn die Videos neben den veröffentlichten Texten nur nebensächlich sind.

Die meisten Regulierungseinrichtungen beginnen im Rahmen der Umsetzung der Richtlinie mit der Erstellung von Listen mit den unter ihre Zuständigkeit fal-

## Definition

Our definition of on-demand audiovisual services is both wider and more pragmatic. Our aim here is not to set out the law but to present as complete as possible a picture of an extremely complex and rapidly changing market for which few reliable data are available. Put simply, we can say that we are endeavouring to identify on-demand media services as defined by the Directive but have supplemented our analysis by including services that do not from the outset fall within the definition contained in the Directive: video-sharing services (T.7.7.); NVoD services and services for storing content on a PVR provided by operators of satellite platforms; pay-DTT packages provided either in the absence of or complementing actual VoD services (T.7.11 and T.7.13); services in respect of which it is debatable whether it is right to describe them as on-demand audiovisual services ("brand channels" in the iTunes or Sony Video Unlimited catalogue (T.7.5); podcasts and applications for smartphones and tablets that permit access to on-demand catalogues (T.7.6); applications for Smart TV (T.7.15) or services on video-sharing platforms like YouTube and Dailymotion (T.7.8 et T.7.9). We believe the reason for widening this definition is clear: the aim is to produce an overview of the strategic options of the various players by trying to show how they stand with regard to the various technical means available. It is interesting to note that for the operators the dividing lines determined by issues of intellectual property rights are more significant than the division between television and on-demand audiovisual media services established by the Directive. The main strategic division is between catch-up television services (operated almost exclusively by television broadcasters) and VoD services that provide catalogues of titles, which constitute a much more open market.

However, the surveys presented here are not yet complete. The services hardest to count are those freely accessible on the internet. We have provided "minimum" figures for VoD services (which offer films, catalogues of television, music videos, documentaries, educational programmes, etc.) (T.7.2 and T.7.3). By contrast, however, we are currently unable to provide figures on the number of online catch-up TV services offered by broadcasters at their own website, either their channel's website proper or their specific catch-up TV website. There is also no updated list of services offered by manufacturers of video games consoles, Blu-ray players or laptops, nor have we produced figures for on-demand audiovisual services provided by mobile telephone operators, which services are generally provided in addition to the channel offering described in

## Définition

Notre définition des services audiovisuels à la demande est ici à la fois plus large et plus pragmatique. Notre objectif n'est pas de dire le droit mais d'essayer de présenter une vision aussi complète que possible d'un marché extrêmement complexe, en rapide évolution et pour lequel peu de données fiables sont disponibles. En simplifiant, nous pouvons dire que nous cherchons à identifier les services de médias audiovisuels à la demande tels que définis par la Directive mais que nous avons complété notre analyse en incluant des services qui ne relèvent pas a priori de la définition de la Directive : les services de partage vidéo (T.7.7.), les services de NVoD et les services de stockage sur PVR proposés par les opérateurs de plates-formes satellitaires ou de bouquets de télévision à péage sur télévision numérique terrestre en l'absence ou en complément de services de VoD proprement dits (T.7.11 et T.7.13), ainsi que des services dont la qualification en tant que services de médias à la demande peut prêter à discussion (les « chaînes de marques » dans le catalogue de iTunes ou de Sony Video Unlimited (T.7.5) ; les podcasts ainsi que les applications pour smartphones et tablettes permettant d'accéder à des catalogues à la demande (T.7.6), les applications pour Smart TV (T.7.15) ou encore les plates-formes de partage vidéo telles YouTube et Dailymotion (T.7.8 et T.7.9). La raison de cet élargissement nous paraît claire : il s'agit d'essayer de dresser un panorama des options stratégiques des différents acteurs en essayant de montrer comment ils se positionnent par rapport aux diverses possibilités techniques. Il est intéressant de noter que pour les opérateurs les frontières déterminées par les questions de droits de propriété intellectuelle sont plus prégnantes que le clivage télévision / service de média audiovisuel à la demande établi par la Directive. La principale segmentation stratégique est en effet celle qui oppose les services de télévision de rattrapage (opérés quasi uniquement par des diffuseurs de télévision) et les services de VoD impliquant des catalogues de titres, marché beaucoup plus ouvert.

Les recensements présentés ici ne sont cependant pas encore complets. Les services les plus difficiles à dénombrer sont les services en accès libre sur internet. Nous proposons des chiffres « a minima » pour les services de VoD (qui proposent des films, des catalogues de séries de télévision, des vidéo-musiques, de documentaires, de programmes de formation,...) (T.7.2 et T.7.3). Par contre, nous ne sommes pas pour l'instant en mesure de proposer des chiffres sur le nombre de services de télévision de rattrapage *(catch up TV)* en ligne proposés par les radiodiffuseurs sur leur propre site web, site classique de leur chaîne ou site spécifique à la télévision de rattrapage. Manque également un recensement à jour des services proposés par les constructeurs de consoles de jeux vidéo, de lecteurs de Blu-ray ou d'ordinateurs

lenden Diensten (T.7.1), meistens nach Einführung eines Systems zur Anmeldung audiovisueller Abrufdienste. Allerdings bestehen weiterhin große Unterschiede, was die Ansätze dieser Einrichtungen und ihre Interpretation der Definition betrifft. Zudem sind die Aufstellungen häufig unvollständig.

## *Definition*

Unsere Definition von audiovisuellen Mediendiensten auf Abruf ist hier weiter gefasst und pragmatischer. Unser Ziel ist nicht eine juristische Beurteilung, sondern eine möglichst vollständige Darstellung dieses außerordentlich komplexen Marktes, der sich rasch entwickelt und für den nur wenige zuverlässige Daten vorliegen. Kurz, wir versuchen, die audiovisuellen Mediendienste auf Abruf, so wie sie in der Richtlinie definiert sind, zu erfassen, aber haben zusätzlich Dienste aufgenommen, die eigentlich nicht unter die Definition der Richtlinie fallen: Video-Tauschdienste (T.7.7), Dienste für NVoD und Speicherung auf PVR, die von den Betreibern von Satellitenplattformen oder Bezahlfernsehbouquets in Ermangelung echter VoD-Dienste oder als Ergänzung zu solchen Diensten im digitalen terrestrischen Fernsehen angeboten werden (T.7.11 und T.7.13), sowie Dienste, deren Einstufung als audiovisueller Mediendienst auf Abruf nicht eindeutig ist (die „Markenkanäle" im Katalog von iTunes oder von Sony Video Unlimited (T.7.5)), Podcasts sowie Apps für Smartphones und Tablet-PCs, mit denen der Zugang zu Abrufkatalogen möglich ist (T.7.6), Apps für Smart TV (T.7.15) oder auch die Plattformen für „Video Sharing" wie YouTube oder Dailymotion (T.7.8 und T.7.9). Mit dieser erweiterten Darstellung wollen wir versuchen, einen Gesamtüberblick über die strategischen Optionen der verschiedenen Akteure zu geben, indem wir aufzeigen, wie sie sich mit Blick auf die diversen technischen Möglichkeiten positionieren. Für die Betreiber sind Fragen des geistigen Eigentums relevanter als die in der Richtlinie gemachte Trennung zwischen Fernsehen und audiovisuellem Mediendienst auf Abruf. Die wichtigste strategische Einteilung stellt die (fast ausschließlich von Fernsehveranstaltern angebotenen) *Catch-up*-TV-Dienste den VoD-Diensten mit ihren Titelkatalogen und dem viel offeneren Markt gegenüber.

Die hier gezeigten Aufstellungen sind allerdings noch nicht vollständig. Am schwierigsten sind diejenigen Dienste zu erfassen, die im Internet frei zugänglich sind. Wir geben hier für die VoD-Dienste (mit einem Angebot aus Spielfilmen, TV-Serienkatalogen, Musikvideos, Dokumentationen, Bildungsprogrammen usw.) konservative Zahlen an (T.7.2 und T.7.3). Dagegen sind wir derzeit nicht in der Lage, Angaben über die Zahl der Catch-up-TV-Dienste zu machen, die von den Rundfunkveranstaltern online über ihren eigenen Internetauftritt, die klassische Website ihres Senders oder eine spezielle

T.5.22. Finally, we have not included in our surveys either offers the legality of which appears doubtful (websites offering the quite clearly unauthorised streaming of films, databases with links to files accessible using peer-to-peer software) or services specialising in adult content, the most popular of which are, incidentally, established in the United States.

### Development of the market

While establishing the number of services offered is already a complex operation in itself, measuring their success is all the more difficult. When it comes to measuring the success of services, it is at the moment impossible to rely on the operators' co-operation. With a few exceptions, most refuse to communicate detailed data on the success of their on-demand services (number of downloads, annual revenues, etc). As far as we know, France is the only country where a public body (CNC, http://www.cnc.fr) regularly publishes in-depth studies on the national VoD and catch-up TV markets.

Given this lack of transparency, the best alternatives are as follows:

- for pay-VoD services, Screen Digest, with the co-operation of the International Video Federation (IVF), employs a methodology fairly similar to that used to piece together the physical video market: on the basis of statements of revenues of library companies that are IVF members, it is possible to model the final consumption (T.7.15 to T.7.18, see also T.2.4). These analyses highlight the diversity in Europe with regard to the relative importance of online VoD and VoD offered by the distribution platforms (cable, satellite, IPTV, DTT) (T.7.17).
- in the case of video-sharing platforms and free online services, various audience measurement companies provide data from tracking carried out on the basis of samples of households. For the big European countries, Comscore is the only company with a unified methodology (see T.8.4 – T.8.6).
- in the case of the channels offered by video-sharing platforms (YouTube and Dailymotion), data are available, at a given moment, on their web pages. These data comprise the number of videos offered, the number of subscribers (YouTube only) and the cumulative number of viewings of the videos in the catalogue (see T.7.9).

portables. Nous n'avons pas non plus établi de relevé des services audiovisuels à la demande proposés par les opérateurs de service de téléphonie mobile, généralement proposés en complément à l'offre de chaînes décrite au T.5.22. Enfin nous n'avons inclus dans nos relevés ni les offres dont la légalité paraît douteuse (sites proposant des films en *streaming* de manière assez évidemment non autorisée, bases de liens vers des fichiers accessibles en *peer-to-peer*) ni les services spécialisés en contenus pour adultes, les plus populaires de ceux-ci étant d'ailleurs des sites établis aux Etats-Unis.

### Evolution du marché

Si le dénombrement des services offerts est déjà, en soi, une opération complexe, la mesure de leur succès est, a fortiori, d'autant plus difficile. Pour mesurer le succès des services, il est, pour l'instant, impossible de compter sur la collaboration des opérateurs. Mis à part quelques uns d'entre eux, la plupart refusent de communiquer des données détaillées sur le succès de leurs services à la demande (nombre de téléchargements, chiffre d'affaires, ...). A notre connaissance, la France est le seul pays où un organisme public, le CNC (http://www.cnc.fr) publie régulièrement des études approfondies sur le marché national de la VoD et de la télévision de rattrapage.

Face à cette absence de transparence, les alternatives les plus solides sont les suivantes :

- Pour les services payants de VoD, Screen Digest avec la collaboration de l'IVF utilise une méthodologie assez similaire à celle utilisée pour reconstituer le marché de la vidéo physique : sur base des déclarations de revenus des sociétés de portefeuilles de droits membres de la l'IVF, il est possible de modéliser la consommation finale (T.7.15 à T.7.18, voir également le T.2.4). Ces analyses mettent en évidence la diversité européenne en ce qui concerne l'importance relative de la VoD en ligne et celle de la VoD proposée par les plates-formes de distribution (câble, satellite, IPTV, TNT) (T.7.17).
- Pour les plates-formes de partage vidéo et les services gratuits en ligne, diverses sociétés de mesure d'audience proposent des données, issues de tracking menées à partir d'échantillons de foyers. Pour les grands pays européens, la société Comscore est la seule qui propose une méthodologie unifiée (voir T.8.4 à T.8.6).
- Pour les chaînes proposées par les plates-formes de partage vidéo (YouTube et Dailymotion), des données sont accessibles, en instant T, sur leurs pages. Elles proposent le nombre de vidéos proposées, le nombre d'abonnés (YouTube uniquement) et le nombre cumulé de visionnements des vidéos présentes dans le catalogue (voir T.7.9).

Seite für verpasste Sendungen, angeboten werden. Ebenso fehlen eine aktuelle Erfassung der Dienste von Herstellern von Videospielkonsolen, Blu-ray-Playern oder Notebooks sowie eine Aufstellung der audiovisuellen Abrufdienste von Mobilfunkanbietern, üblicherweise als Ergänzung zu dem in T.5.22 beschriebenen Senderangebot. Und schließlich haben wir keine Angebote erfasst, bei denen es Zweifel an ihrer Gesetzmäßigkeit gibt (Websites mit einem offensichtlich unerlaubten Streaming-Angebot von Spielfilmen, Link-Sammlungen zu Dateien in *Peer-to-Peer*-Netzen), und auch keine auf Inhalte für Erwachsene spezialisierten Dienste, von denen die populärsten außerdem ihren Standort in den Vereinigten Staaten haben.

### *Marktentwicklung*

Bereits die Aufzählung der angebotenen Dienste ist komplex, aber noch schwieriger ist die Messung ihres Erfolgs. Um diesen zu beurteilen, kann man derzeit nicht auf die Unterstützung der Betreiber rechnen. Abgesehen von einigen wenigen weigern sich die meisten, detaillierte Angaben über den Erfolg ihrer Abrufdienste zu machen (Zahl der Downloads, Umsatz usw.). Unseres Wissens ist Frankreich das einzige Land, in dem eine öffentlich-rechtliche Einrichtung, der CNC (http://www.cnc.fr), regelmäßig detaillierte Studien über den nationalen Markt für VoD und *Catch-up*-TV veröffentlicht.

Angesichts dieser Intransparenz sind folgende Alternativen am überzeugendsten:

- Für VoD-Bezahldienste verwendet Screen Digest unter Mitwirkung von IVF eine ähnliche Methodik wie bei der Darstellung des physischen Videomarktes: Auf der Grundlage von Angaben der Lizenzgesellschaften, die Mitglied bei IVF sind, zu ihren Einnahmen kann ein Modell der Endnutzung erstellt werden (T.7.15 bis T.7.18, siehe auch T.2.4). Diese Analysen machen deutlich, wie unterschiedlich in Europa die relative Bedeutung von VoD im Online-Bereich und auf den Verbreitungsplattformen (Kabel, Satellit, IPTV, DVB-T) ist (T.7.17).
- Für die Plattformen für „Video Sharing" und die kostenlosen Onlinedienste bieten verschiedene Konsumforschungsgesellschaften Daten an, die auf *Tracking*-Maßnahmen in ausgewählten Haushalten zurückgehen. Das Unternehmen Comscore bietet als einziges eine einheitliche Methode für die großen europäischen Länder an (siehe T.8.4 - T.8.6).
- Die Sender auf den Plattformen für „video Sharing" (YouTube und Dailymotion) bieten auf ihren Seiten den Zugang zu Daten für einen bestimmten Zeitpunkt an. So erfährt man dort die Zahl der angebotenen Videos, die Zahl der Abonnenten (nur bei YouTube) und die Zahl der kumulierten Videoaufrufe aus dem Katalog (siehe T.7.9).

Source: European Audiovisual Observatory

T.7.1

## Number of on-demand services in the European Union (EUR 27) as identified by regulatory authorities

2010-2012 In units.

| Country | Report INDIREG early 2010 [1] | EPRA/OBS 12.2010 [2] | Observatory 01.2012 [5] |
|---|---|---|---|
| AT | ~ | ~ | 59 [6] |
| BE | 20 | ~ | ~ |
| - BE (CFR) | 4 | ~ | 10 |
| - BE(VLG) | 16 | 5 | 9 |
| BG | 5 | ~ | 14 |
| CY | 0 | 2 | ~ |
| CZ | 0 | 64 | 95 |
| DE | >300 | 18 [3] | ~ |
| DK | 0 | ~ | ~ |
| EE | 1 | ~ | ~ |
| ES | ~ | ~ | ~ |
| FI | ~ | ~ | ~ |
| FR | ~ | 185 [3] [4] | 83 [7] |
| GB | 150-200 | 129 | 200 |
| GR | 6 | ca25 | ~ |
| HU | ~ | ~ | 58 |
| IE | ~ | ~ | ~ |
| IT | ~ | 35 | ~ |
| LT | ~ | ~ | 4 |
| LU | 4 | ~ | ~ |
| LV | 0 | ~ | ~ |
| MT | 0 | ~ | ~ |
| NL | ~ | ~ | ~ |
| PL | ca25 | 40 | 44 [8] |
| PT | 2 | ~ | ~ |
| RO | 1 | 0 | ~ |
| SE | ~ | ~ | 27 |
| SI | ~ | ~ | ~ |
| SK | 0 | ~ | 39 |

[1] Hans Bredow Institute for Media Research et al., "Indicators for independence and efficient functioning of audiovisual media services regulatory bodies for the purpose of enforcing the rules in the AVMS Directive", May 2010.
[2] Information collected by EPRA Secretary for the European Audiovisual Observatory, Nov.-Dec. 2010.
[3] List of services available, including services established in other countries.
[4] Includes social networks, some adult services, news services, podcast services.
[5] Information collected by the European Audiovisual Observatory from the lists of registered non-linear services on the websites of the regulatory authorities, January 2012.
[6] Includes many catch-up and web TV services, with just approximately ten services that seem to comprise VOD, or catch-up TV for national channels, or subscription based video portals, or online video sharing, or aggregated sports content streaming.
[7] Data as of Spring 2011 from the CNC video barometers which identified 52 VOD platforms (VàD) and 31 catch-up TV services (TVR). The list includes services based outside of France. The CSA has identified 45 catch-up TV services in February 2011.
[8] Data as of March 2011.

Source: European Audiovisual Observatory

T.7.2
G.7.1

## Number of online VoD services accessible in European countries February 2012

This list is based on a census of operational services carried out by the European Audiovisual Observatory in February 2012.
As the census may not be exhaustive, data should be considered as *a minima*. The census includes online services with : feature or short films, TV catalogue programmes, animation, documentaries, training, music, archives.

It does not include catch-up TV services, services providing only news, adult programmes, «light programmes» (such as film trailers, home shopping programmes,…). Branded channels on platforms such as Facebook, iTunes Store or YouTube are not included.

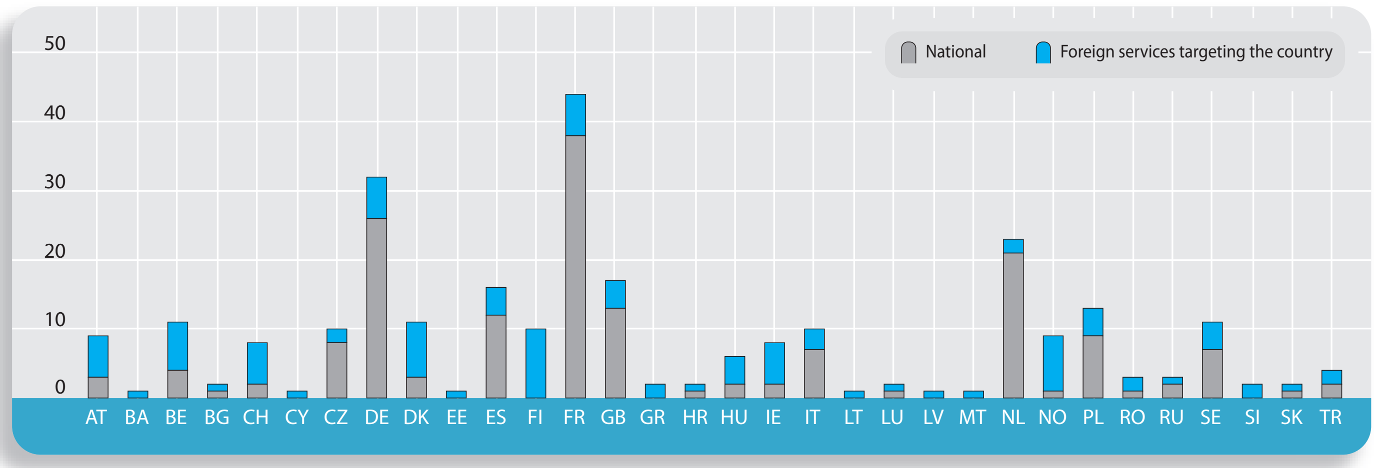
Services for reception only on phones are not included.

Delocalised services targetting one or various specific countries are counted in their various reception countries.

Services with universal access are counted only in their country of origin.

| Country | National | Foreign services targeting the country ❶ | *Total* |
|---|---|---|---|
| AT | 3 | 6 | *9* |
| BA | | 1 | *1* |
| BE | 4 | 7 | *11* |
| BG | 1 | 1 | *2* |
| CH | 2 | 6 | *8* |
| CY | | 1 | *1* |
| CZ | 8 | 2 | *10* |
| DE | 26 | 6 | *32* |
| DK | 3 | 8 | *11* |
| EE | | 1 | *1* |
| ES | 12 | 4 | *16* |
| FI | | 10 | *10* |
| FR | 38 | 6 | *44* |
| GB | 13 | 4 | *17* |
| GR | | 2 | *2* |
| HR | 1 | 1 | *2* |
| HU | 2 | 4 | *6* |
| IE | 2 | 6 | *8* |
| IT | 7 | 3 | *10* |
| LT | | 1 | *1* |
| LU | 1 | 1 | *2* |
| LV | | 1 | *1* |
| MT | | 1 | *1* |
| NL | 21 | 2 | *23* |
| NO | 1 | 8 | *9* |
| PL | 9 | 4 | *13* |
| RO | 1 | 2 | *3* |
| RU | 2 | 1 | *3* |
| SE | 7 | 4 | *11* |
| SI | | 2 | *2* |
| SK | 1 | 1 | *2* |
| TR | 2 | 2 | *4* |

❶ Does not include 16 European based services that may be considered of international ambition and various national services without geolocalisation, which may be accessed in all European territories. Those services are counted only in their country of origin.



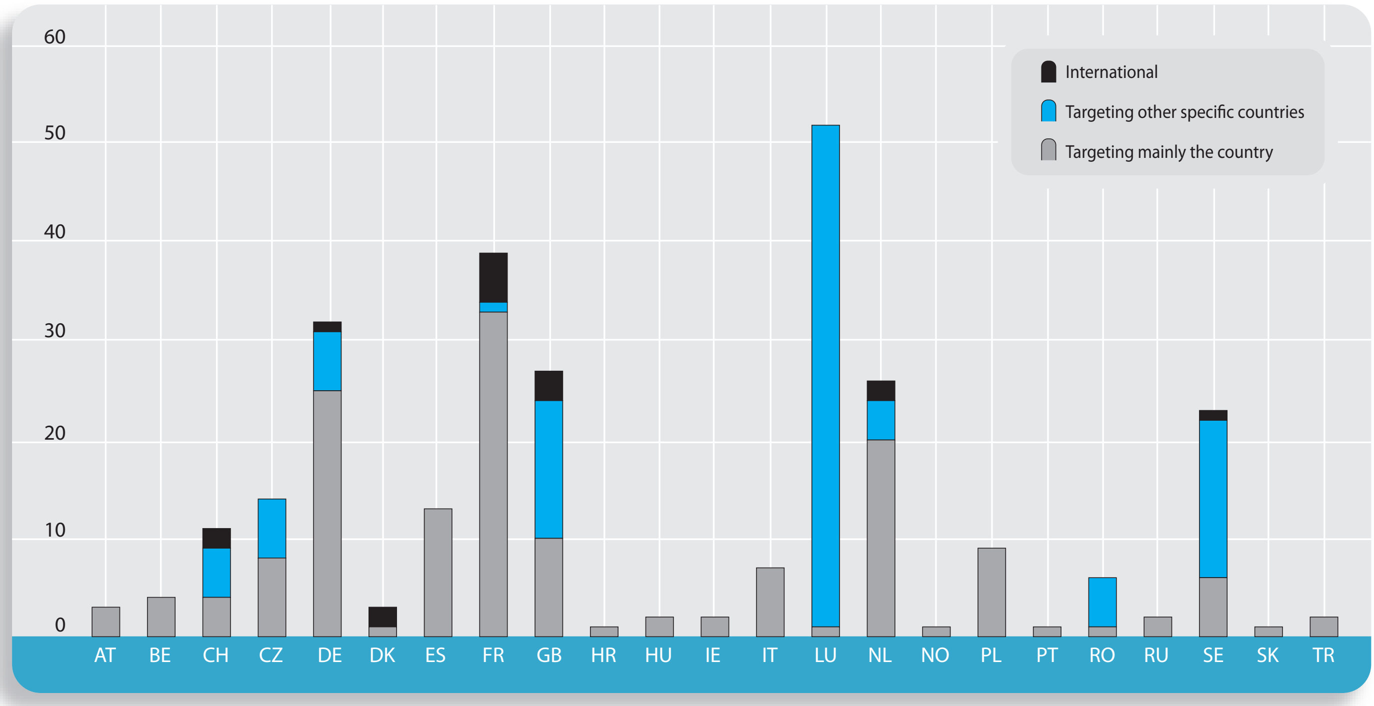

Source: European Audiovisual Observatory

T.7.3
G.7.2

## Number of online VoD services by country of establishment February 2012

This list is based on a census of operational services done by the European Audiovisual Observatory in February 2012.
As the census may not be exhaustive, data should be considered as a minima.
The census includes online services with : feature or short films, TV catalogue programmes, animation, documentaries, training, music, archives
It does not include catch-up TV services, services providing only news, adult programmes, «light programmes» (such as film trailers, home shopping programmes,…). Branded channels on platforms such as Facebook, iTunes Store or YouTube are not included.
Services for reception only on phones are not included.

| Country | Targeting mainly the country | Targeting other specific countries | International | *Total* |
|---|---|---|---|---|
| **AT** | 3 | | | ***3*** |
| **BE** | 4 | | | ***4*** |
| **CH** | 4 | 5 | 2 | ***11*** |
| **CZ** | 8 | 6 | | ***14*** |
| **DE** | 25 | 6 | 1 | ***32*** |
| **DK** | 1 | | 2 | ***3*** |
| **ES** | 13 | | | ***13*** |
| **FR** | 33 | 1 | 5 | ***39*** |
| **GB** | 10 | 14 | 3 | ***27*** |
| **HR** | 1 | | | ***1*** |
| **HU** | 2 | | | ***2*** |
| **IE** | 2 | | | ***2*** |
| **IT** | 7 | | | ***7*** |
| **LU** | 1 | 51 | | ***52*** |
| **NL** | 20 | 4 | 2 | ***26*** |
| **NO** | 1 | | | ***1*** |
| **PL** | 9 | | | ***9*** |
| **PT** | 1 | | | ***1*** |
| **RO** | 1 | 5 | | ***6*** |
| **RU** | 2 | | | ***2*** |
| **SE** | 6 | 16 | 1 | ***23*** |
| **SK** | 1 | | | ***1*** |
| **TR** | 2 | | | ***2*** |
| ***Total EUR 27*** | ***147*** | ***103*** | ***14*** | ***264*** |
| ***Total EUR 37*** | ***157*** | ***108*** | ***16*** | ***281*** |
| **US** | | 2 | | ***2*** |



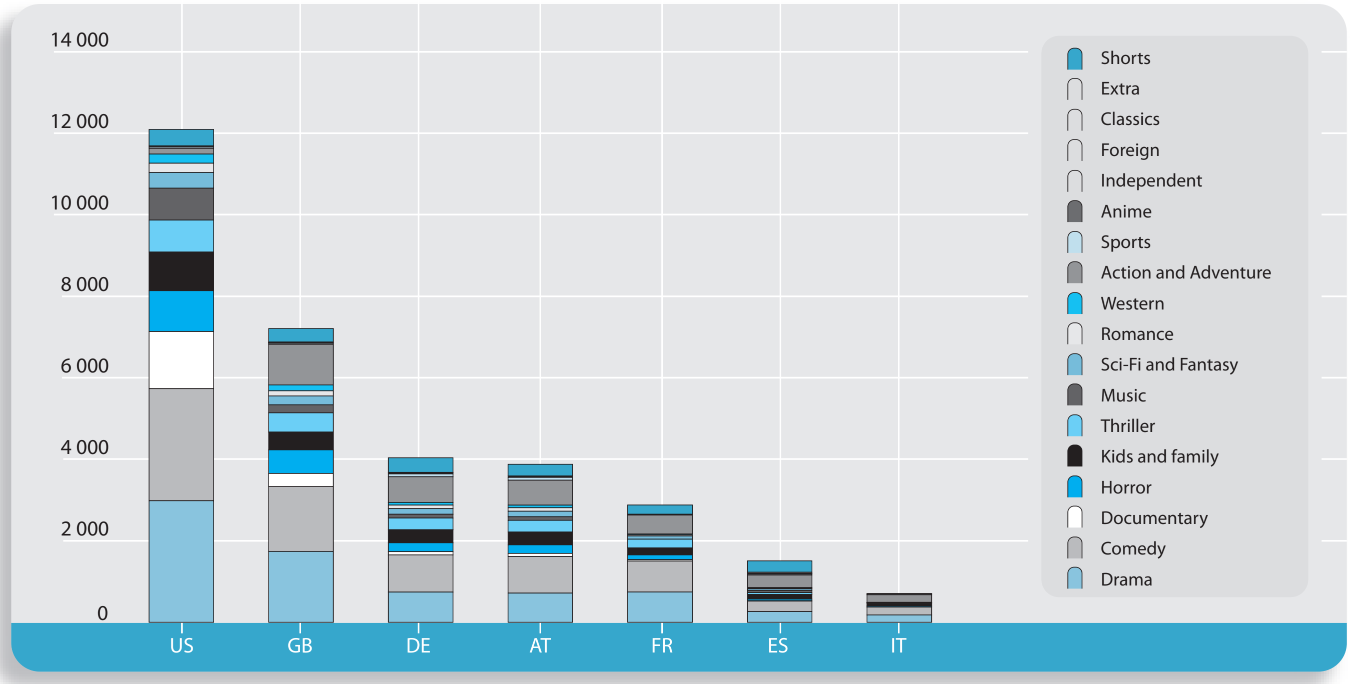

Source: European Audiovisual Observatory

T.7.4
G.7.3

## Number of films by genre in iTunes Stores
## June 2011 In units.

| | US | GB | DE | AT | FR | ES | IT |
|---|---|---|---|---|---|---|---|
| **Drama** | 2 981 | 1 737 | 741 | 716 | 743 | 262 | 180 |
| **Comedy** | 2 748 | 1 595 | 912 | 897 | 759 | 258 | 193 |
| **Documentary** | 1 401 | 318 | 79 | 74 | 34 | 8 | 8 |
| **Horror** | 1 002 | 579 | 218 | 213 | 117 | 42 | 27 |
| **Kids and family** | 948 | 436 | 319 | 314 | 172 | 112 | 39 |
| **Thriller** | 784 | 472 | 288 | 286 | 213 | 46 | |
| **Music** | 781 | 196 | 92 | 88 | | 52 | 23 |
| **Sci-Fi and Fantasy** | 385 | 218 | 138 | 135 | 79 | 40 | 15 |
| **Romance** | 228 | 126 | 87 | 86 | 27 | 18 | 4 |
| **Western** | 225 | 144 | 64 | 64 | 22 | 12 | |
| **Action and Adventure** | 139 | 996 | 631 | 611 | 464 | 309 | 186 |
| **Sports** | 32 | 26 | 70 | 69 | | 25 | 22 |
| **Anime** | 23 | 15 | | | | | |
| **Independent** | 4 | 8 | | | | 14 | 8 |
| **Foreign** | 3 | 2 | | | | | |
| **Classics** | | 2 | | | | 29 | |
| **Extra** | | | 37 | 37 | 19 | | |
| **Shorts** | 402 | 334 | 359 | 284 | 228 | 280 | |

Source : European Audiovisual Observatory




T.7.5

## Number of hosted VoD services on iTunes Stores and Sony's Video unlimited platforms
## 2011-2012 In units.

| Country | iTunes Stores "Networks and Studios" June 2011 | Sony's Video Unlimited "Partner services" February 2012 |
|---|---|---|
| **US** | 41 | 5 |
| **DE** | 28 | 5 |
| **ES** | – | 5 |
| **FR** | 35 | 7 |
| **GB/IE** | 34 | 5 |
| **IT** | – | 4 |

Source: European Audiovisual Observatory

T.7.6

## Examples of providers of applications for smartphones or tablets allowing access to on-demand audiovisual catalogues
### March 2012

| Country | Catch-up TV | Branded TV programmes | VoD | Podcasts |
|---|---|---|---|---|
| AT | ORF, Donau TV | | Sky Deustchland | |
| BE | RTBF, RTL Belgium, VMM | VMM, SBS Belgium | Belgacom, Telenet | RTBF |
| BG | HBO Central Europe | | | |
| CH | SRS SSR Idée suisse, Swisscom | | | |
| CZ | CT, HBO Central Europe, Ocko TV | | | |
| DE | ARD, Deutsche Welle, n-tv, RTL Interaktiv, ProSieben Digital, QVC, ZDF, TV Passau, TV Südbaden | ARD, Prosiebensat.1 Digital, RTL Interaktiv | | ZDF |
| DK | TV2, TDC A/S | SBS TV A/S | Viasat/Viaplay, STofa TV | Danmarks Radio |
| EE | | | | ERR |
| ES | Antena 3, Canal Sur, CCRTV, Chello Multicanal (Canal Cocina, Sol Musica), EITB, MTV Espana, RTVE, Sogecable | Antena 3, CCRTV | Sogecable | EITB |
| FI | MTV Oy, YLE | | Elisa Oy, Viasat/Viaplay | |
| FR | Canal Plus, Direct 8, Euronews, Eurosport, France 24, France-Télévisions, L'Equipe TV, Lagardere Active, M6 Web, SFR TV, TF1, TVR | Canal Plus, M6 Web, Paris Premiere, TF1 | Canal Plus | LCI |
| GB | Baby TV Network, BBC, BSkyB, Channel 4, Channel 5, discovery Communication, ITV Consumers, S4C, Viasat | AETN UK, MTV | | BBC, S4C |
| GR | Skai | | | ERT |
| HR | RTL Televizija, B.Net, HBO Central Europe | | | |
| HU | HBO Central Europe | HBO Holding Zrt | | |
| IE | RTE, TV3 Network | | | |
| IS | | | | |
| IT | Fox International, MTV Italia, RAINet, RTI, Sky Italia, Telecom Italia | Fox International, RTI, Sky Italia | | |
| LT | | | | LRT |
| LV | | | | LTV |
| NL | Brothers Media, NOS, NPO, Omroep Brabant, RTL Nederland, Chellomedia, Makayama Media B.V | RTL Nederland | | AVRO, NPO, VARA, NCRV, TROS, VPRO |
| NO | NRK, TV2 AS | TV2 AS | | NRK |
| PL | HBO Polska | | | |
| PT | RTP | | Zon Multimedia, PT-MEO | |
| RO | HBO Central Europe, TVR Info | | | |
| RU | TNT, RT | | | |
| SE | C: More Entertainment, Kanal 5, SVT, TV 4 | SBS TV A/S | Viasat/Viaplay | |
| SI | HBO Central Europe, RTVSLO | | | |
| SK | eGlu s.r.o. (Joj TV) | | | |
| TR | Beyaz, CNN Türk, Digiturk Play, Dream TV, Fox Turkey, Kanal D, Kanaltürk, Sabah | | | |

Applications published by those providers were identified by browsing in the iTunes Stores of the respective countries.
This table does not claim to provide a comprehensive identification of existing applications.
In general, existence of applications for iPhone or iPad has a parallel with application under Android in the Google Play Store.

Source: European Audiovisual Observatory

T.7.7

## Main video sharing platforms in Europe and US
## March 2012

| Country of estab. | UGC Platforms | Publishing Company | Media Group | Date of launch | Territoria-lisation | Number of portals | Main markets | Possibility of live | Availability on TV-set IPTV |
|---|---|---|---|---|---|---|---|---|---|
| **BG** | VBox7 | Net Info | Sanoma | 2007 | | 1 | BG | • | |
| **BG** | VMusic.bg | Net Info | Sanoma | 05/2009 | | 1 | BG | | |
| **DE** | Clipfish | Clipfish GmbH | RTL Group | 06/2006 | • | 1 | DE | • | T-Online (DE) |
| | Sevenload | Sevenload GmbH | Burda | 04/2006 | • | 11 portals for 17 countries url : AU, CN, DE, FR, ES, GB, ID, IT, JP, KR, MY, NL, PH, RU, SE, SG, US | DE | | |
| **FR** | Daily-motion | Dailymotion S.A. | France Telecom | 03/2005 | | 32 (12 languages) | FR | | 9Box (FR) |
| | MyKewego | Kewego | Kit Digital (CZ/US) | 07/2003 | | 15 countries | FR | | |
| | Wat.TV | WAT | TF1 | 05/2006 | | 1 | FR | | |
| | Wideo | Kewego | Kit Digital (CZ/US) | | | 1 | FR | | |
| **GB** | OneWorld UK | One World Ltd | | | | 1 | GB, US | | |
| **IT** | Tyou.it | Produzioni Cinema-tografiche e video | | | | 1 | IT | | |
| **LU** | You-makeTV | CLT | RTL Group | 09/2007 | | 5 languages (EN, FR, LU, NL, RU) | LU | | |
| **NL** | MaYoMo Map Your Moments | MaYoMo B.V. | | 11/2009 | | 11 languages | | | |
| **PT** | SAPO Videos | PT Comuni-cações, SA | Portugal Telecom | 03/2006 | | 5 | PT, AO, MZ, CV, TL | | |
| **RO** | Myvideo | Myvideo Broadband S.R.L | Prosie-bensat.1 Media AG | 2006 | • | 4 languages 7 countries | DE, RO, BE, NL | | |
| | Triluliu | S.C. Triluliu S.A | | 2007 | | 1 | RO | | |
| **RU** | Rambler Vision | Rambler Internet Holding | Rambler Media Group | 2006 | | 1 | RU | | |
| | RuTube | Rutube | Gazprom Media | 2006 | | 1 | RU | | |
| **US** [1] | Facebook | Facebook Ireland Limited | Facebook Inc. | 02/2004 | | 82 sup-ported languages | World | | |
| **US** | Myspace | Myspace LLC | Specific Media LLC | 08/2003 | | 28 regional versions | World | | |
| **US** | Google+ | Google Inc. | Google | 06/2011 | | | World | | |
| **US** | YouTube | Google Inc. | Google | 02/2005 | | 43 languages versions | US | • | Apple TV |
| **US** | Other platforms : Internet Archive, Break, Buzznet, Expo, Gawwk, Godtube, HD Share, Liveleak, Livestream, Mefeedia, Metacafe, One World, Openfilm, Schooltube, Sciencestage, Twidvid, Ustream, Veoh, Viddler, Veetle, Vimeo, Wildscreen.tv | | | | | | | | |

[1] For Europe, the service is registered in Ireland.

| SmartTV | Availability on mobile | Number of monthly users | TV channels catch-up content | Branded Music Video | VoD film |
|---|---|---|---|---|---|
| | • | 2 millions (January 2011) | | | • |
| | | | | • | |
| | • | 2.87 millions (monthly, 2011) | RTL Classics, RTL News, RTL Regional, 15 hit programmes from RTL channels, Boomerang, Carton Network | • | |
| Phillips, Sony Bravia | • | 0.88 million | DE portal : BBC, DMax, DW, focus TV Fox,NGC | | |
| Sony, Samsung, LG, Panasonic, Philips, Samsung | • | 114 millions | > 30 branded channels of European TV | • | |
| | | | | | |
| | • | | 28 French TV channels | • | |
| | | | | | |
| | • | | | | |
| | | | | | |
| | | | RTL Letzebuerger | | |
| | | | | | |
| | • | | SIC | | |
| HbbTV | • | 7.42 millions | DE : 120 000 premium videos (highlights of ProSieben, Sat.1, Kabel1, Sixx) | EMI, Sony, Warner, Universal | • |
| | | | | | |
| | | | | | |
| Sony Bravia | • | | Programme from the channel TNT | | Trailers |
| | | | | | |
| • | • | 845 millions (Feb. 2012) | Alert messages | • | Flicklaunch; FR : TF1 Video |
| | • | 63 millions (Dec. 2010) | | • | |
| | • | 100 millions (Feb. 2012) | | | |
| Sony, Samsung, LG, Panasonic, Philips, Samsung | • | | > 600 channels by European broadcasters | • | • |
| | | | | | |

Source: European Audiovisual Observatory

T.7.8

# Number of channels on YouTube and Dailymotion provided by broadcasters

## March 2012

By country of establishment and by size of the catalogue

| Country | Number of video included in the catalogue 1 -10 | 11 -50 | 51 -100 | 101 -200 | 201 -500 | 501 -1 000 | 1 001 -2 000 | 2 001 -5 000 | 5 001 -10 000 | >10 000 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **YouTube** | | | | | | | | | | | |
| **AL** | | | | | | | 1 | | | | *1* |
| **AT** | | | | 1 | 1 | | | | | 1 | *3* |
| **BE** | | 2 | | | 2 | | | | | | *4* |
| **CH** | | | | 1 | | 2 | | | | | *3* |
| **CY** | | | | 1 | | | | | | | *1* |
| **CZ** | 1 | 1 | | 1 | | | | | | | *3* |
| **DE** | 5 | 11 | 7 | 8 | 4 | 6 | 2 | 1 | 3 | | *47* |
| **DK** | | | 2 | 2 | 2 | 2 | | | | | *8* |
| **EE** | | 1 | | | 1 | | 1 | | | | *3* |
| **ES** | 4 | 3 | 5 | 2 | 3 | 1 | 1 | 5 | 5 | 3 | *32* |
| **FI** | 1 | | | | | 1 | | | | | *2* |
| **FR** | 9 | 5 | 3 | 6 | 6 | 3 | 5 | 6 | 18 | 1 | *62* |
| **GB** | 36 | 44 | 29 | 29 | 32 | 13 | 18 | 3 | 5 | 4 | *213* |
| **GR** | 3 | 1 | 3 | 1 | 2 | | 1 | 2 | | | *13* |
| **HR** | 2 | 3 | | | | 2 | | | | | *7* |
| **HU** | 2 | 2 | 3 | | 1 | | 1 | | | | *9* |
| **IE** | | 1 | 3 | 2 | 3 | | 1 | | | | *10* |
| **IS** | 1 | | 1 | | | | | | | | *2* |
| **IT** | 3 | 2 | 2 | 12 | 7 | 5 | 10 | 8 | 3 | 2 | *54* |
| **LT** | 1 | 2 | | 1 | | | | 1 | 1 | | *6* |
| **LU** | 4 | 1 | 1 | 1 | | | 1 | | | | *8* |
| **LV** | | 1 | 2 | | | | | | 1 | | *4* |
| **MT** | 1 | | | | | | | | | | *1* |
| **NL** | 2 | 10 | 4 | 6 | 7 | 11 | 2 | 1 | 6 | 1 | *50* |
| **NO** | | 4 | 1 | | | | 1 | | | | *6* |
| **PL** | 5 | 8 | | 2 | 11 | 5 | 1 | | | | *32* |
| **PT** | 2 | | | 1 | | | | | | 1 | *4* |
| **RO** | 3 | 3 | 2 | 3 | 1 | | 2 | 1 | | | *15* |
| **SE** | | 1 | | | 1 | | 1 | | | | *3* |
| **SI** | 1 | 1 | | | 2 | | | | | | *4* |
| **SK** | | 1 | | | 1 | | | | | | *2* |
| ***Total*** | ***86*** | ***108*** | ***68*** | ***80*** | ***87*** | ***51*** | ***49*** | ***28*** | ***42*** | ***13*** | ***612*** |
| **Dailymotion** | | | | | | | | | | | |
| **AL** | | | | | | | | | 1 | | *1* |
| **AT** | | | | | | | | 1 | | | *1* |
| **BE** | 1 | | 1 | 1 | | | | | | | *3* |
| **CH** | | | | | | 1 | | | | | *1* |
| **DE** | | 1 | | | 1 | | | 1 | | | *3* |
| **ES** | | | | | | | | | 1 | | *1* |
| **FR** | 1 | 4 | 1 | 3 | 5 | 3 | 1 | 5 | 8 | 4 | *35* |
| **GB** | | | | | | | | 2 | | 2 | *4* |
| **IT** | | 1 | | | | | | 1 | 1 | 1 | *4* |
| ***Total*** | ***2*** | ***6*** | ***2*** | ***4*** | ***6*** | ***4*** | ***1*** | ***10*** | ***11*** | ***7*** | ***53*** |

The census of channels was conducted during the 2nd week of March 2012.

Channels for branded TV programmes (eg BBC Top Gear) or for specific target (eg BBC Urdu) are counted as individual channels.

Channels from small local TV stations (numerous in countries such as DE, IT, NL) have not been identified in a systematic manner.

Channels from pure online players are not taken into consideration.

Source: European Audiovisual Observatory

T.7.9

## Most successful channels on YouTube and Dailymotion operated by broadcasters

### March 2012

Ranking by cumulated number of video viewings as at 10 March 2012.

| Main targeted market | Name of the service | URL | Date of registration | Catalogue (Nb video) | Number of subscribers | Cumulative number of video viewings (millions) | Average views per video |
|---|---|---|---|---|---|---|---|
| **YouTube** | | | | | | | |
| **AL** | Topchannel Albania | www.youtube.com/user/TopChannelAlbania | 23.06.2011 | 8 506 | 3 826 | 38.30 | 4 502 |
| **AT** | Servus TV | www.youtube.com/user/ServusTV | 2.01.2010 | 217 | 561 | 0.84 | 3 876 |
| **BE** | Ketnet | www.youtube.com/user/KetnetVideo | 24.11.2010 | 37 | 418 | 2.70 | 72 946 |
| **CH** | TSR | www.youtube.com/user/TSR | 27.12.2005 | 716 | 1 123 | 4.14 | 5 782 |
| | SF | www.youtube.com/user/SchweizerFernsehen | 24.01.2007 | 730 | 5 489 | 16.60 | 22 740 |
| **CY** | Antena 1 Cyprus | www.youtube.com/user/ant1cyweb | 15.10.2010 | 156 | 90 | 0.26 | 1 686 |
| **CZ** | Disney Channel CZ | www.youtube.com/user/TheDisneyChannelCZ | ~ | 190 | 576 | 0.97 | 5 116 |
| | CT | www.youtube.com/user/CeskaTelevize | ~ | 170 | 1 123 | 0.59 | 3 476 |
| **DE** | ARD | www.youtube.com/user/ard | 7.11.2005 | 5 475 | 32 748 | 66.30 | 12 110 |
| | Disney Channel Deutschland | www.youtube.com/user/DisneyChannelGermany | 27.08.2009 | 311 | 16 567 | 64.80 | 208 360 |
| | ZDF | www.youtube.com/user/zdf | 2.05.2006 | 999 | 22 025 | 22.40 | 22 422 |
| | Spiegel TV | www.youtube.com/user/spiegeltv | 13.07.2008 | 784 | 24 369 | 21.60 | 27 551 |
| | ZDF Das aktuelles Sportstudio | www.youtube.com/sportstudio | ~ | 517 | 11 535 | 11.70 | 22 631 |
| | Euronews DE | www.youtube.com/user/euronewsde | 30.05.2007 | 9 387 | 7 745 | 9.40 | 1 001 |
| | ZDF Neo | www.youtube.com/zdfneo | 17.07.2009 | 322 | 12 261 | 7.90 | 24 534 |
| | Sport1 | www.youtube.com/user/SPORT1 | 13.01.2006 | 549 | 15 947 | 6.50 | 11 840 |
| | Disney XD Deutschland | www.youtube.com/user/DisneyXDGermany | 9.09.2009 | 175 | 3 526 | 5.97 | 34 097 |
| | Tele 5 | www.youtube.com/user/WirLiebenKino | 18.02.2008 | 118 | 3 968 | 3.24 | 27 458 |
| **DK** | TV-2 Danmark | www.youtube.com/user/TV2Danmark | 30.04.2009 | 231 | 4 005 | 12.70 | 54 978 |
| | TV2 Zulu | www.youtube.com/user/Zululicious | 16.04.2009 | 570 | 3 752 | 8.50 | 14 912 |
| | TV 2 Sport | www.youtube.com/user/2Sporten | 2.02.2009 | 392 | 2 158 | 4.21 | 10 740 |
| **EE** | ERR | www.youtube.com/user/Rahvusringhaaling | 6.02.2008 | 1 937 | 838 | 3.40 | 1 755 |
| | TV3 Eesti | www.youtube.com/user/tv3estonia | 6.08.2009 | 31 | 91 | 0.69 | 22 258 |
| | Viasat Eesti | www.youtube.com/user/viasatest | 3.12.2007 | 402 | 25 | 0.05 | 124 |
| **ES** | Antena 3 Television | www.youtube.com/user/antena3 | 11.03.2006 | 5 351 | 94 253 | 321.20 | 60 026 |
| | Cuatro | www.youtube.com/user/cuatro | 20.11.2005 | 6 737 | 57 180 | 214.10 | 31 780 |
| | RTVE | www.youtube.com/user/rtve | 30.03.2006 | 5 051 | 52 128 | 204.40 | 40 467 |
| | La Sexta | www.youtube.com/user/misextatv | 23.11.2007 | 3 602 | 85 284 | 96.00 | 26 652 |
| | TV3 | www.youtube.com/user/tv3 | 29.03.2006 | 5 649 | 41 141 | 69.50 | 12 303 |
| | Castilla y Leon Television | www.youtube.com/user/cyltelevision | 5.03.2009 | 22 526 | 5 710 | 41.50 | 1 842 |
| | Canal Sur | www.youtube.com/user/canalsur | 15.01.2007 | 2 692 | 8 514 | 41.20 | 15 305 |
| | RTVCM | www.youtube.com/user/RTVCM | 18.12.2007 | 10 759 | 3 190 | 26.85 | 2 496 |
| | Eitbcom | www.youtube.com/user/eitbcom | 11.03.2009 | 3 203 | 9 879 | 25.60 | 7 993 |
| | Canal + | www.youtube.com/user/plus | 1.12.2005 | 1 248 | 3 776 | 13.99 | 11 210 |
| **FI** | YLE | www.youtube.com/user/yle | 20.10.2005 | 651 | 2 397 | 3.59 | 5 512 |
| **FR** | Direct 8 | www.youtube.com/user/Direct8 | 18.09.2006 | 6 736 | 58 576 | 209.15 | 31 050 |
| | BFM TV | www.youtube.com/user/BFMTV | 18.09.2006 | 10 428 | 8 057 | 54.50 | 5 226 |
| | Motors TV | www.youtube.com/user/motorstvfrance | 8.06.2007 | 2 837 | 14 818 | 47.13 | 16 611 |
| | Disney Channel FR | www.youtube.com/user/DisneyChannelFR | ~ | 401 | 13 225 | 45.90 | 114 464 |
| | IDF1 | www.youtube.com/user/IDF1 | 29.11.2006 | 3 336 | 5 561 | 26.48 | 7 937 |
| | France-Télévisions Tour de France | www.youtube.com/user/letourdefrance | 23.10.2006 | 1 174 | 9 041 | 15.31 | 13 042 |
| | Euronews FR | www.youtube.com/user/euronewsfr | 30.05.2007 | 9 578 | 11 986 | 15.29 | 1 596 |
| | LCM | www.youtube.com/user/LCM | 30.10.2005 | 7 817 | 1 306 | 9.56 | 1 223 |
| | NRJ12 | www.youtube.com/user/nrj12 | 17.11.2006 | 5 301 | 5 413 | 8.10 | 1 528 |
| | TV Tours | www.youtube.com/user/tvtours | 22.08.2008 | 5 238 | 950 | 7.71 | 1 472 |

T.7.9

## Most successful channels on YouTube and Dailymotion operated by broadcasters (Continued)

### March 2012

Ranking by cumulated number of video viewings as at 10 March 2012.

| Main targeted market | Name of the service | URL | Date of registration | Catalogue (Nb video) | Number of subscribers | Cumulative number of video viewings (millions) | Average views per video |
|---|---|---|---|---|---|---|---|
| GB | BBC | www.youtube.com/user/BBC | 11.11.2005 | 10 784 | 385 364 | 818.82 | 75 929 |
| | ITN The Showbiz | www.youtube.com/user/itn | 4.06.2006 | 8 115 | 75 273 | 523.17 | 64 470 |
| | BBC Top Gear | www.youtube.com/user/TopGear | 27.03.2006 | 432 | 773 211 | 297.09 | 687 718 |
| | Channel 4 | www.youtube.com/user/channel4 | 27.03.2006 | 1 932 | 89 533 | 227.37 | 117 688 |
| | ITN News Channel | www.youtube.com/user/itnnews | 26.11.2006 | 6 034 | 49 530 | 185.55 | 30 750 |
| | Disney Channel UK | www.youtube.com/user/DisneyChannelUK | 6.12.2007 | 329 | 48 005 | 129.63 | 394 021 |
| | E4 | www.youtube.com/user/e4 | ~ | 475 | 41 704 | 65.74 | 138 408 |
| | Sky News | www.youtube.com/user/skynews | 12.06.2006 | 2 083 | 15 916 | 50.01 | 24 009 |
| | 4oD Comedy | www.youtube.com/user/4oDComedy | 6.10.2009 | 1 058 | 95 125 | 46.00 | 43 478 |
| | ITN The Music 411 | www.youtube.com/user/itnmusic | 6.03.2008 | 1 560 | 15 516 | 44.65 | 28 625 |
| GR | ANT 1 | www.youtube.com/user/AntennaGR | 5.11.2008 | 1 677 | 3 845 | 11.80 | 7 036 |
| | MAD TV | www.youtube.com/user/MADTVGREECE | 5.11.2006 | 2 947 | 3 861 | 6.61 | 2 243 |
| | Nova Sports | www.youtube.com/user/novasports | 21.11.2006 | 309 | 3 519 | 2.15 | 6 945 |
| HR | Slavonska Televizija | www.youtube.com/user/STVosijek | 24.12.2007 | 777 | 85 | 0.58 | 744 |
| | HRT eHrvaska | www.youtube.com/user/eHrvatskaTV | 27.12.2009 | 839 | 1 728 | 0.43 | 511 |
| HU | Viasat 3 | www.youtube.com/user/VIASAT3 | 6.11.2007 | 1 021 | 593 | 4.70 | 4 603 |
| IE | RTE | www.youtube.com/user/rte | 1.04.2006 | 1 337 | 30 215 | 41.25 | 30 852 |
| | RTE Hardy Bucks | www.youtube.com/user/hardybucks | 21.02.2008 | 61 | 20 269 | 6.42 | 105 180 |
| | RTE2fm | www.youtube.com/user/RTE2fm | 8.06.2008 | 396 | 1 450 | 2.09 | 5 278 |
| IS | Stöd 2 | www.youtube.com/user/stod2Iceland | 9.09.2008 | 69 | 69 | 0.28 | 4 058 |
| IT | RAI | www.youtube.com/user/rai | 27.09.2005 | 4 744 | 151 092 | 381.71 | 80 462 |
| | Fox TV | www.youtube.com/user/FoxTV | ~ | 1 343 | 41 019 | 54.40 | 40 506 |
| | RAI News 24 | www.youtube.com/user/RaiNews24 | 10.11.2006 | 1 849 | 11 166 | 49.49 | 26 767 |
| | RAI Celebrity | www.youtube.com/user/Raicelebrity | 1.03.2010 | 1 645 | 12 203 | 36.07 | 21 924 |
| | La 7 | www.youtube.com/user/la7 | 29.11.2005 | 2 055 | 29 947 | 34.98 | 17 024 |
| | RAI - X Factor Italia | www.youtube.com/user/xfactoritalia | 4.11.2008 | 1 412 | 11 392 | 32.80 | 23 229 |
| | RAI Junior | www.youtube.com/user/RAITVjunior | 26.02.2010 | 1 991 | 7 016 | 17.21 | 8 643 |
| | Fox Flop TV | www.youtube.com/user/Floptv | 18.01.2009 | 380 | 11 775 | 9.69 | 25 505 |
| | Disney Channel Italia | www.youtube.com/user/DisneyChannelIT | 26.06.2009 | 186 | 4 740 | 8.95 | 48 140 |
| | AntennaSud | www.youtube.com/user/ANTENNASUD | 31.03.2009 | 10 926 | 1 923 | 7.11 | 650 |
| LT | LRT | www.youtube.com/user/LRTinklas | 22.10.2009 | 5 109 | 1 953 | 9.59 | 1 877 |
| | LNK | www.youtube.com/user/laisvaskanalas | 26.11.2010 | 1 137 | 2 594 | 3.64 | 3 201 |
| | Sport1 | www.youtube.com/user/SPORT1LT | 2.09.2009 | 2 245 | 467 | 1.44 | 643 |
| LU | RTL Letzebuerg | www.youtube.com/user/RTLLetzebuerg | 5.01.2012 | 3 | 17 | 0.03 | 8 667 |
| LV | LTV | www.youtube.com/user/ltvpanorama | ~ | 6 711 | 2 858 | 9.75 | 1 453 |
| NL | NPO Uitzendinggemist | www.youtube.com/user/uitzendinggemist | 6.03.2007 | 55 | 10 466 | 60.87 | 1 106 636 |
| | RTV Noord | www.youtube.com/user/rtvnoord | 4.06.2007 | 9 506 | 3 698 | 31.52 | 3 315 |
| | Omroep Brabant | www.youtube.com/user/omroepbrabant | 15.02.2007 | 10 868 | 4 263 | 27.10 | 2 493 |
| NO | NRK | www.youtube.com/user/nrk | 13.03.2006 | 1 146 | 7 657 | 26.02 | 22 708 |
| | TV2 | www.youtube.com/user/tv2underholdning | 6.11.2008 | 39 | 1 061 | 3.07 | 78 744 |
| | TV3 Norge | www.youtube.com/user/tv3norge | 8.02.2009 | 80 | 116 | 0.87 | 10 838 |
| PL | TVN | www.youtube.com/user/tvnpl | 12.08.2008 | 851 | 42 984 | 101.27 | 119 005 |
| | TVP | www.youtube.com/user/itvp | 13.12.2006 | 1 099 | 12 729 | 48.21 | 43 866 |
| | Voice of Poland TVP | www.youtube.com/user/VoiceOfPolandTVP | 30.06.2011 | 527 | 3 564 | 19.26 | 36 550 |
| | iplaTV | www.youtube.com/user/iplaTV | 22.09.2008 | 858 | 4 506 | 18.74 | 21 839 |

T.7.9

# Most successful channels on YouTube and Dailymotion operated by broadcasters (Continued)

## March 2012

Ranking by cumulated number of video viewings as at 10 March 2012.

| Main targeted market | Name of the service | URL | Date of registration | Catalogue (Nb video) | Number of subscribers | Cumulative number of video viewings (millions) | Average views per video |
|---|---|---|---|---|---|---|---|
| **PL (continued)** | Disney Channel PL | www.youtube.com/user/DisneyChannelPL | ~ | 478 | 4 302 | 17.00 | 35 567 |
| | Bitwa na Glosy TVP | www.youtube.com/user/bitwanaglosy | 26.01.2011 | 214 | 1 729 | 9.75 | 45 565 |
| | Disney XD Polska | www.youtube.com/user/DisneyXDpl | ~ | 574 | 3 954 | 7.38 | 12 850 |
| | Seriale TVP | www.youtube.com/user/serialetvp | 15.07.2011 | 350 | 1 246 | 5.87 | 16 760 |
| | HBO Polska | www.youtube.com/user/HBOPOLSKA | 27.01.2009 | 258 | 636 | 3.88 | 15 054 |
| | Fakty TVP Wroclaw | www.youtube.com/user/FAKTYtvpWROCLAW | 24.03.2010 | 377 | 172 | 1.59 | 4 228 |
| **PT** | RTP | www.youtube.com/user/rtp | 13.03.2006 | 16 424 | 45 563 | 186.54 | 11 358 |
| | SIC | www.youtube.com/user/SiC | 1.11.2005 | 127 | 1 469 | 4.46 | 35 118 |
| | Tvi | www.youtube.com/user/CanalOficialTVI | 19.10.2011 | 653 | 1 594 | 4.11 | 6 296 |
| **RO** | MediaPro Music | www.youtube.com/user/MediaProMusic | 1.10.2007 | 336 | 36 020 | 96.25 | 286 464 |
| | Relitatea | www.youtube.com/user/realitatea | 2.01.2007 | 3 644 | 4 138 | 36.77 | 10 090 |
| | PRO TV - Romanii au Talent | www.youtube.com/user/romaniiautalent | 1.02.2010 | 74 | 2 085 | 5.57 | 75 284 |
| **SE** | Kanal 5 | www.youtube.com/user/kanal5 | 3.09.2006 | 1 014 | 8 853 | 20.53 | 20 242 |
| | SVT | www.youtube.com/user/svt | 25.01.2006 | 348 | 3 271 | 13.90 | 39 943 |
| | Disney XD Sweden | www.youtube.com/user/DisneyXDSE | 26.08.2009 | 195 | 460 | 1.53 | 7 821 |
| **SI** | TV3 Slovenia | www.youtube.com/user/tv3slovenija | 24.08.2007 | 43 | 98 | 1.50 | 34 884 |
| | RTVSLO MMIC | www.youtube.com/user/RTVSLOMMC | 19.09.2007 | 320 | 90 | 0.32 | 1 000 |
| | Televizija Maribor | www.youtube.com/user/TelevizijaMaribor | 5.11.2011 | 565 | 16 | 0.04 | 69 |
| **SK** | Markiza TV | www.youtube.com/user/MojaMarkiza | 24.03.2010 | 205 | 1 253 | 6.11 | 29 810 |
| | Joj TV | www.youtube.com/user/TVJOJofficial | 25.08.2011 | 18 | 21 | 0.03 | 1 778 |
| **Dailymotion** | | | | | | | |
| **AL** | Topchannel Albania | www.dailymotion.com/TopChannelAlbania | | 7 568 | ~ | 0.02 | 3 |
| **BE** | RTBF | www.dailymotion.com/RTBF | | 93 | ~ | 0.28 | 3 011 |
| **CH** | TSR | www.dailymotion.com/RTS | | 543 | ~ | 1.44 | 2 643 |
| **DE** | Torgau TV | www.dailymotion.com/TORGAU-TV | | 388 | ~ | 0.04 | 111 |
| | ARTE+7DE | www.dailymotion.com/ARTEplus7de | | 37 | ~ | 0.01 | 189 |
| **ES** | Euronews ES | www.dailymotion.com/euronews-es | | 7 887 | ~ | 0.35 | 44 |
| **ES** | TV3 | www.dailymotion.com/TV3 | | 5 386 | ~ | 0.15 | 27 |
| **FR** | BFM TV | www.dailymotion.com/BFMTV | | 12 109 | ~ | 17.77 | 1 467 |
| | INA | www.dailymotion.com/ina | | 56 974 | ~ | 14.31 | 251 |
| | Fox Sport | www.dailymotion.com/FOX_Sports_Interactive | | 15 319 | ~ | 3.63 | 237 |
| | Public Sénat | www.dailymotion.com/publicsenat | | 5 240 | ~ | 3.41 | 651 |
| | LCP | www.dailymotion.com/LCP | | 5 146 | ~ | 3.4 | 661 |
| | Euronews | www.dailymotion.com/euronews-fr | | 7 905 | ~ | 2.54 | 322 |
| | Direct 8 | www.dailymotion.com/direct8 | | 2 888 | ~ | 2.47 | 855 |
| | IDF1 | www.dailymotion.com/IDF1 | | 3 109 | ~ | 1.71 | 551 |
| | i>Tele | www.dailymotion.com/ITELE | | 6 931 | ~ | 1.54 | 223 |
| | MotorsTV | www.dailymotion.com/MotorsTV | | 871 | ~ | 1.54 | 1 768 |
| **GR** | Kanali 6 | www.dailymotion.com/kanali06 | | 37 | ~ | 0.08 | 2 216 |
| **IT** | Euronnews IT | www.dailymotion.com/euronews-it | | 8 034 | ~ | 0.26 | 32 |
| | RAI | www.dailymotion.com/RaiTV | | 39 | ~ | 0.17 | 4 282 |
| | Amica9 TV | www.dailymotion.com/amica9tv | | 8 118 | ~ | 0.17 | 21 |

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T.7.9

## Most successful channels on YouTube and Dailymotion operated by broadcasters (Continued)

March 2012 Ranking by cumulated number of video viewings as at 10 March 2012.

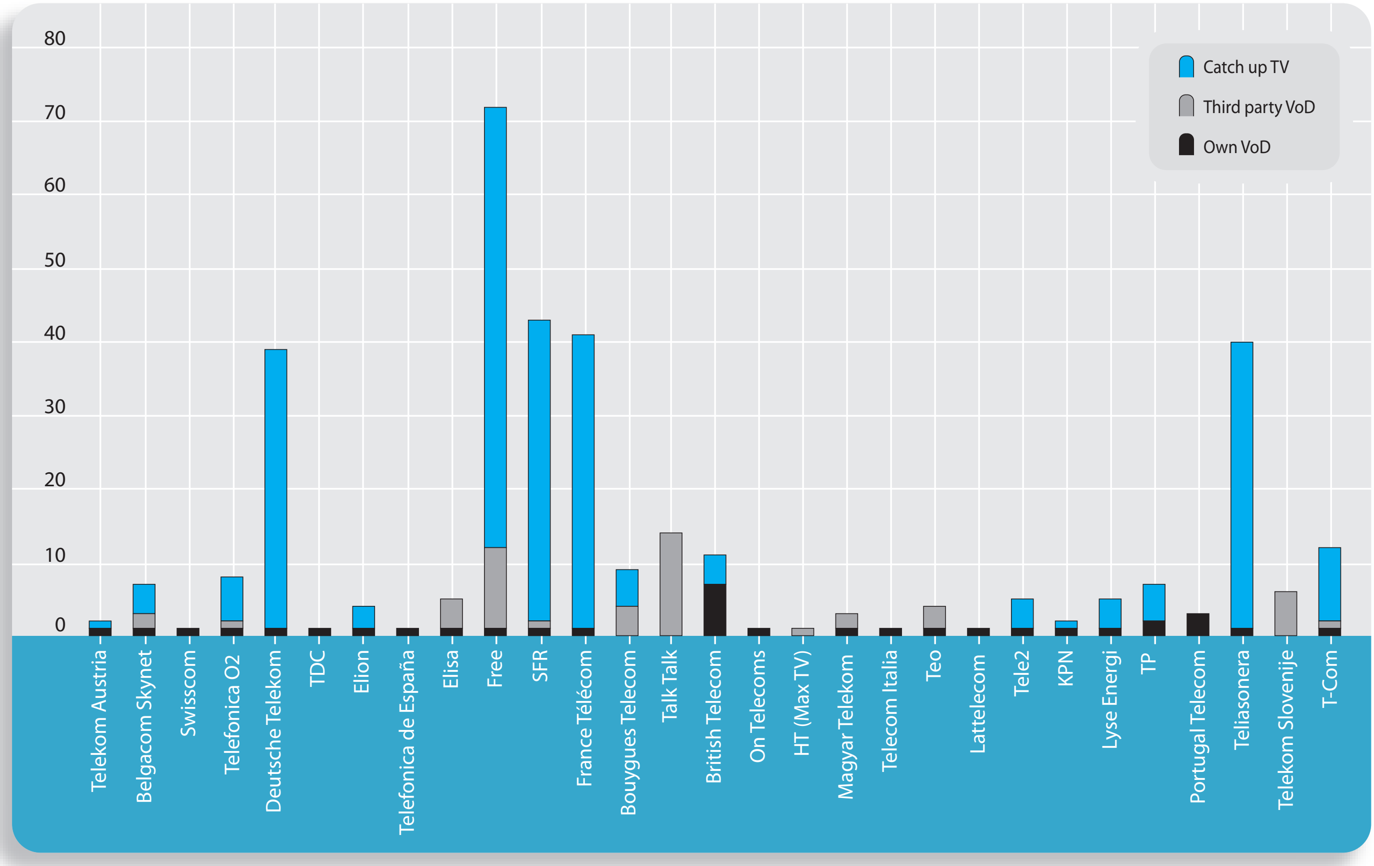
| Name of the service | Country of establ. | URL | Date of registration | Catalogue (Nb video) | Number of subscribers | Cumulative number of video viewings (millions) | Average views per video |
|---|---|---|---|---|---|---|---|
| **Channels targeting the international market (YouTube)** | | | | | | | |
| RT (formerly Russia Today) | GB | www.youtube.com/user/russiatoday | 28.03.2007 | 15 723 | 273 769 | 694.40 | 44 165 |
| BBC Worldwide | GB | www.youtube.com/user/BBCWorldwide | 8.02.2007 | 5 218 | 402 518 | 620.40 | 118 896 |
| Al Jazeera English | GB | www.youtube.com/user/AlJazeeraEnglish | 23.11.2006 | 28 037 | 247 284 | 352.67 | 12 579 |
| Fashion TV | AT | www.youtube.com/user/fashiontv | ~ | 26 676 | 130 987 | 202.28 | 7 583 |
| Motors TV English | FR | www.youtube.com/user/motorstelevision | 28.03.2007 | 2 366 | 32 307 | 73.46 | 31 049 |
| Euronews No Comment | FR | www.youtube.com/user/nocommenttv | 13.04.2007 | 5 583 | 27 708 | 65.84 | 11 793 |
| France 24 French | FR | www.youtube.com/user/france24 | 4.03.2006 | 9 443 | 23 117 | 36.00 | 3 812 |
| Discovery Channel International | GB | www.youtube.com/user/DiscoveryTV | 15.11.2006 | 579 | 116 114 | 32.02 | 55 309 |
| France 24 English | FR | www.youtube.com/user/france24english | 4.04.2007 | 7 907 | 14 882 | 26.97 | 3 411 |
| Euronews English | FR | www.youtube.com/user/Euronews | 18.09.2006 | 9 626 | 22 003 | 22.49 | 2 336 |
| Deutsche Welle German | DE | www.youtube.com/user/deutschewelle | 30.09.2006 | 8 484 | 12 806 | 20.30 | 2 393 |
| Deutsche Welle English | DE | www.youtube.com/user/deutschewelleenglish | 4.09.2007 | 7 767 | 11 741 | 11.80 | 1 519 |
| CNN International | GB | www.youtube.com/user/CNNInternational | 16.11.2006 | 4 543 | 19 402 | 5.16 | 1 136 |
| TV5 Monde | FR | www.youtube.com/user/tv5monde | 2.11.2007 | 1 241 | 5 896 | 4.38 | 3 529 |
| **European channels in Arabic (YouTube)** | | | | | | | |
| RT (in Arabic) | RU | www.youtube.com/user/Rtarabic | ~ | 9 704 | 35 267 | 53.44 | 5 507 |
| BBC Arabic | GB | www.youtube.com/user/BBCArabicNews | 7.04.2009 | 5 969 | 24 194 | 18.51 | 3 101 |
| France 24 AR | FR | www.youtube.com/user/france24arabic | 4.04.2007 | 4 162 | 8 630 | 12.63 | 3 035 |
| Euronews AR | FR | www.youtube.com/user/euronewsar | 30.07.2008 | 7 273 | 9 299 | 11.80 | 1 622 |
| Deutsche Welle Arabic | DE | www.youtube.com/user/deutschewellearabic | 19.08.2011 | 587 | 509 | 0.10 | 170 |
| BBC Arabic 4 Tech | GB | www.youtube.com/user/BBC4tech | 23.10.2010 | 51 | 396 | 0.02 | 333 |
| BBC Cairo | GB | www.youtube.com/user/BBCcairo | 17.02.2012 | 9 | 38 | 0.00 | 72 |
| **Channels targeting the international market (Dailymotion)** | | | | | | | |
| ITN News | GB | www.dailymotion.com/itnnews | | 23 137 | ~ | 16.65 | 719 |
| France 24 | FR | www.dailymotion.com/france24 | | 11 668 | ~ | 7.86 | 673 |
| CNN International | GB | www.dailymotion.com/CNN_International | | 36 661 | ~ | 5.05 | 138 |
| Fashion TV | AT | www.dailymotion.com/Fashion_TV | | 4 583 | ~ | 1.92 | 420 |
| ITN Entertainment | GB | www.dailymotion.com/itnentertainment | | 2 768 | ~ | 1.69 | 609 |
| France 24 English | FR | www.dailymotion.com/france24english | | 7 291 | ~ | 1.09 | 149 |
| DW English | DE | www.dailymotion.com/DW_English | | 4 724 | ~ | 0.68 | 144 |
| RT | GB | www.dailymotion.com/rt_news | | 3 001 | ~ | 0.67 | 224 |
| Euronews EN | FR | www.dailymotion.com/euronews-en | | 8 054 | ~ | 0.51 | 63 |

Source: European Audiovisual Observatory

T.7.10
G.7.4

## Number of on-demand audiovisual services provided by main IPTV providers in Europe February 2012

| Country | Services | Own VoD | Third party VoD | Catch up TV | Total |
|---|---|---|---|---|---|
| AT | Telekom Austria | 1 | | 1 | 2 |
| BE | Belgacom Skynet | 1 | 2 | 4 | 7 |
| CH | Swisscom | 1 | | | 1 |
| CZ | Telefonica O2 | 1 | 1 | 6 | 8 |
| DE | Deutsche Telekom | 1 | | 38 | 39 |
| DK | TDC | 1 | | | 1 |
| EE | Elion | 1 | | 3 | 4 |
| ES | Telefonica de España | 1 | | | 1 |
| FI | Elisa | 1 | 4 | | 5 |
| FR | Free | 1 | 11 | 60 | 72 |
| FR | SFR | 1 | 1 | 41 | 43 |
| FR | France Télécom | 1 | | 40 | 41 |
| FR | Bouygues Telecom | | 4 | 5 | 9 |
| GB | Talk Talk | | 14 | | 14 |
| GB | British Telecom | 7 | | 4 | 11 |
| GR | On Telecoms | 1 | | | 1 |
| HR | HT (Max TV) | | 1 | | 1 |
| HU | Magyar Telekom | 1 | 2 | | 3 |
| IT | Telecom Italia | 1 | | | 1 |
| LT | Teo | 1 | 3 | | 4 |
| LV | Lattelecom | 1 | | | 1 |
| NL | Tele2 | 1 | | 4 | 5 |
| NL | KPN | 1 | | 1 | 2 |
| NO | Lyse Energi | 1 | | 4 | 5 |
| PL | TP | 2 | | 5 | 7 |
| PT | Portugal Telecom | 3 | | | 3 |
| SE | Teliasonera | 1 | | 39 | 40 |
| SI | Telekom Slovenije | | 6 | | 6 |
| SK | T-Com | 1 | 1 | 10 | 12 |




Source: European Audiovisual Observatory

T.7.11

## Number of NVoD and on-demand services provided by main satellite packagers in Europe January-February 2012

| Country | Packagers | NVoD | PVR possibilities ❶ | On demand services: TV (Push) |
|---|---|---|---|---|
| AT | Sky Österreich | 3 : Sky Select (9 channels), Blue Movie (3 channels) ; Sky Bundesliga (7 channels) | Sky+ | 2 (Sky Select auf Sky Anytime, Sky Mediathek) |
| BE | Mobistar | | • | |
| | Telesat | | • | |
| | TV Vlaanderen | | • | |
| CY | Multichoice Hellas "Nova" | | | 1 (Nova on demand) |
| DE | Sky Deutschland | 3 : Sky Select (9 channels), Blue Movie (3 channels) ; Sky Bundesliga (7 channels) | Sky+ | 2 (Sky Select auf Sky Anytime, Sky Mediathek) |
| DK | Canal Digital | | • | |
| | Viasat | | • | |
| ES | Canal+ | 3 : Multideporte (7), Canal+ Liga | • | |
| FI | Canal Digital | | • | |
| | Viasat | | • | |
| FR | Canal Plus | | • | |
| | Canalsat | 8 | • | 1 |
| GB | BSkyB "Sky" | 2 : Sky Movies (64 channels) ; Sky Sport Active (18 channels) | • | 1 (Sky Anytime) |
| | Freesat | | • | |
| GR | Multichoice Hellas "Nova" | | • | 1 (Nova on demand) |
| IE | BSkyB "Sky" | 2 : Sky Movies (64 channels) ; Sky Sport Active (18 channels) | • | 1 (Sky Anytime) |
| IT | Sky Italia (IT) | 2 : Sky Primafila (28 channels), Sky Calcio (15 channels) | • | 1 (Sky Selection On Demand) |
| NL | Canal Digitaal | | • | |
| NO | Canal Digital | | • | |
| | Viasat | | • | |
| PL | Canal+ Cyfrowy "Cyfra+" (PL) | | • | 2 (Cyfra+ OnDemand, HBO On demand) |
| | Polsat Cyfrowy (PL) | 1 : VoD | • | |
| PT | MEO Satélite | | • | |
| | Zon TV Cabo (satélite) | | • | |
| SE | Canal Digital | | • | |
| | Viasat | | • | |
| TR | Digitürk (TR) | | • | DVDigi |

❶ Only with upmarket set top boxes.
❷ iPhone/iPad/iTouch App providing a remote control function for specific set top boxes.

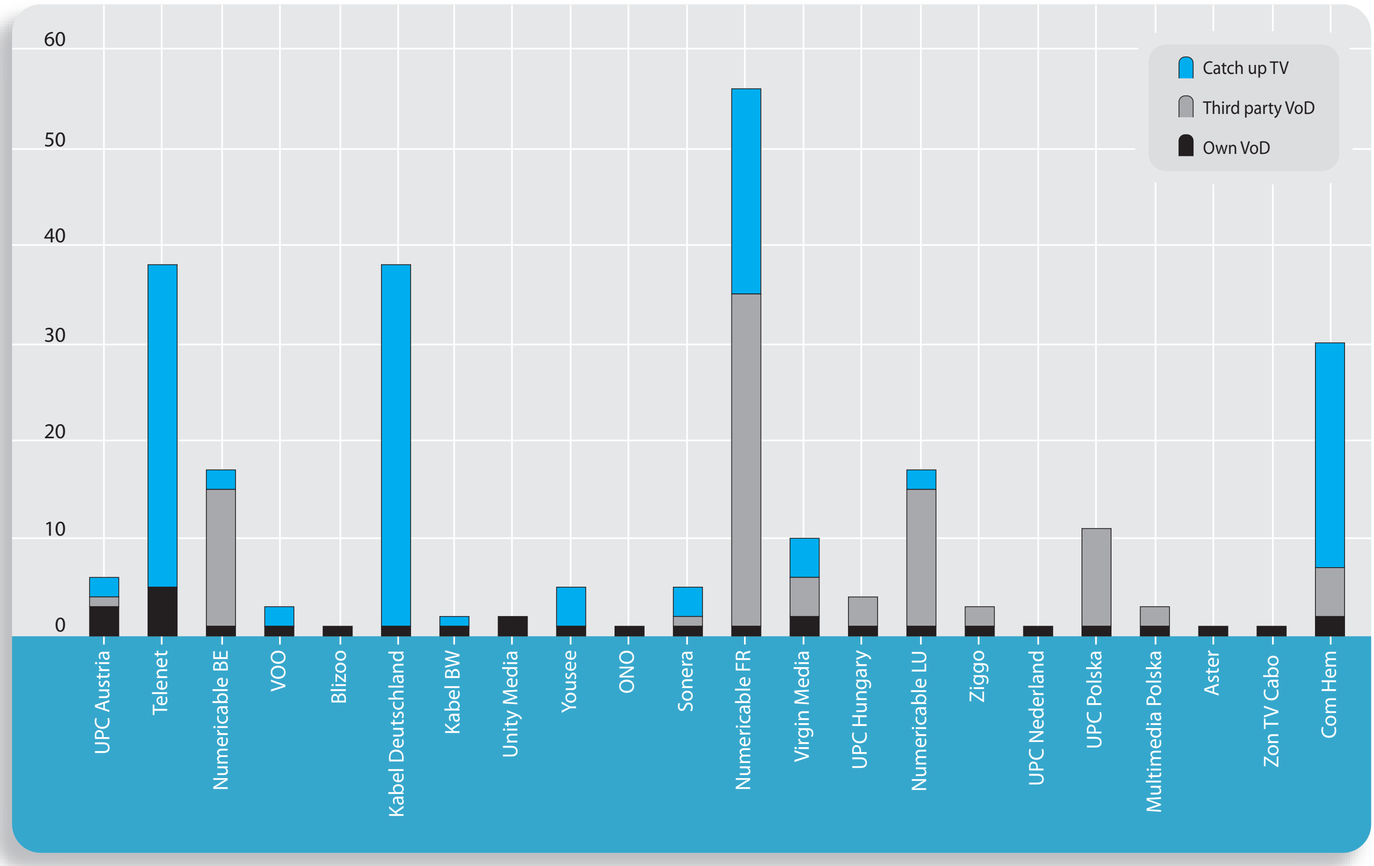
| ❶ TV (connected through set top box) | PC/MAC | Smartphone, tablets | Game console | IPTV ❶ | Smart TV |
|---|---|---|---|---|---|
| | Sky Go | Sky Go (iphone/ipad App) | XboX 360 | | |
| | Moviestar | Multi-écrans | | Multi-écrans | |
| | | | | | |
| | | | | | |
| | | | | | |
| | Sky GO | Sky Go (iphone/ipad App) | | | |
| | Canal Digital Go | ❷ | | | |
| Viaplay | Viaplay | Viaplay (iphone/ipad App) | | | Viaplay (LG) |
| | Canal Plus Yomvi | Canal Plus Yomvi | Xbox 360 (announced) | | Canal Plus Yomvi (Samsung) |
| | Canal Digital Go | ❷ | | | |
| Viaplay | Viaplay | Viaplay (iphone App) | | | Viaplay (LG, Samsung) |
| Canal + à la demande | Canal+ à la demande, CanalPlay | Canal + (iphone, ipad Android Apps) | XboX 360, psp | Canal+ à la demande, Canal Play | |
| Canalsat à la demande | Canalsat à la demande (34 catch-up TV services) | Canalsat (iphone, ipad Android Apps) | XboX 360, psp | Canalsat à la demande (33 services) | |
| Sky Anytime+ | Sky Go | Sky Go (iphone/ipad App) | XboX 360 | | |
| BBCiplayer, ITVplayer | | | | | |
| | | | | | |
| Sky Anytime+ | Sky Go | Sky Go (iphone/ipad App) | XboX 360 | | |
| | | Sky Go (iphone/ipad App) | | | |
| | | | | | |
| | Canal Digital Go | ❷ | | | |
| Viaplay | Viaplay | Viaplay (iphone/ipad App) | | | |
| | Cyfra+ Online (8 catch up Tv services) | Cyfra+Online (iphone/ipad App) | | | |
| | | | | | |
| Meo Go | Meo Go | Meo Go (iPhone/ipad App) ❷ | | | |
| | Zonline | Zonline (iPad App) | | | |
| | Canal Digital Go | ❷ | | | |
| Viaplay | Viaplay | Viaplay (iphone/ipad App) | | | |
| | | | | | |

Source: European Audiovisual Observatory, MAVISE database

T.7.12
G.7.5

## Number of on-demand audiovisual services provided by main cable operators in Europe February 2012

| Country | Services | Own VoD | Third VoD | Catch up TV |
|---|---|---|---|---|
| AT | UPC Austria | 3 | 1 | 2 |
| BE | Numericable FR | 1 | 38 | 2 |
| | Numericable NL | 1 | 14 | |
| | Telenet FR | 3 | | 36 |
| | Telenet NL | 3 | | 17 |
| | VOO | 1 | | 2 |
| BG | Blizoo | 1 | | |
| DE | Kabel Deutschland | 1 | | 37 |
| | Kabel BW | 1 | | 1 |
| | Unity Media | 2 | | |
| DK | Yousee | 1 | | 4 |
| ES | ONO | 1 | | |
| FI | Sonera | 1 | 1 | 3 |
| FR | Numericable | 1 | 34 | 21 |
| GB | Virgin Media | 2 | 4 | 4 |
| HU | UPC Hungary | 1 | 3 | |
| LU | Numericable | 1 | 14 | 2 |
| NL | Ziggo | 1 | 2 | |
| | UPC Nederland | 1 | | |
| PL | UPC Polska | 1 | 10 | |
| | Multimedia Polska | 1 | 2 | |
| | Aster | 1 | | |
| PT | Zon TV Cabo | 1 | | |
| SE | Com Hem | 2 | 5 | 23 |




Source: European Audiovisual Observatory

T.7.13

## NVoD and on-demand services provided by DTT packagers in Europe
### January-February 2012

| | | | | On demand services: | | | | |
|---|---|---|---|---|---|---|---|---|
| **Country** | **Services** | **NVoD** | **PVR possibilities** | **Push VoD** | **HbbTV** | **Set top box/ OTT** | **IPTV/ hybrid set top box** | **Smart TV** |
| **DE** | Media Broadcast (HbbTV barker channel) | | | | redbull.tv VoD; QVC (shopping channel); | | | |
| | ZDF/ Bayerisher Fernsehen (BR) | | | | (access to catch-up services and VoD portals) ZDF Mediathek, ARD Mediathek, Bayerisches Fernsehen, Arte, BR-alpha, Phoenix, EinsPlus, HR Fernsehen, MDR, SWR Fernsehen, EinsExtra | | | |
| **FR** | SelecTV (to launch April 2012) | | • | SelecTV | | | | |
| | (Mes Services TV) - pilot programme limited to Burgundy | | | | France 24; Eco TV (BNP Paribas); TV5 La Monde; Gong TV | | | |
| **GB** | Freeview | | • | | | BBC iPlayer/ Lovefilm.com/ Youtube | | BBC iPlayer/ Lovefilm. com/ YouTube (Apps on LG, Panasonic, Samsung, Sony Bravia) |
| | BT Vision | | • | | | | Vision Replay Catch-up; BBC iPlayer/ BT Vision (on demand) / Dolly and Beyond (Asian films and TV on demand) | |
| | Top-up TV | | • | Tv Favourites/ PictureBox | | TV Favourites/ PictureBox | | |
| **IT** | Mediaset Premium | 10. Premium calcio; Premium Calcio 1-6/ Premium Calcio HD/ Premium Camcio HD2/ Premium Moto GP/ | • | Mediaset Premium Play | | | | |
| | Europa 7 | 3. Red Zone 1/ Red Zone 2/ Red Zone 3 | • | | | | | |
| **NO** | RiksTV AS | | • | Alltid Underholdning (Forever Entertainment, VoD)/ Secrets on Demand/ Disney on Demand/ | | | | |
| **SE** | Boxer | | | | | Filmbutiken / SF Anytime/ Canal+ Play / SVT Replay/ TV4/ TV4 Fakta/ Sjuan/ Discovery/ Animal Planet/ TLC/ TV11/ Eurosport. | | |

Source: European Audiovisual Observatory

T.7.14

## Overview of main connected TV manufacturers
## January-February 2012

| Manufacturers | Launch | Average number of TV and AV on-demand apps per country | Available in the following countries ❶ | Major developments and deals for apps | Distinctive brands | Sales/Users |
|---|---|---|---|---|---|---|
| **Samsung Smart TV (Smart Hub)** | 2008 (text services)<br>2009 (video) | From 6 to 15 | AT, BE, CH, CZ, DE, DK, ES, FI, FR, GB, HU, IT, NL, NO, PT, PL, RU, SE | 2009: YouTube<br>2010: BBC iPlayer and Lovefilm in the UK; INA in France; History (worldwide)<br>2011: Videoland; MaxDome; L'Équipe.fr ; TVP; BBC News; TF1; Ipla ; Orange Video Portal ; CNBC Real Tme | AceTrax/ BBC iPlayer / TF1/ YouTube/ Lovefilm/ MaxDome/ Samsung's Explore 3D | Samsung Electronics claims to have sold 720 000 smart TVs in Europe to June 2011 |
| **Sony Bravia/ Internet TV** | 2010 | From 5 to 18 | All European countries | 2010: Sevenload<br>2011: Ipla (Poland) ; Moshcam; Lovefilm Germany | M6/ Lovefilm/ Deutsche Welle/ Billabong/ Berliner Philharmoniker/ RAI/ Prosieben | |
| **Panasonic (Viera Cast)** | 2009 | 30 | AT, CH, DE, FR, GB, IE, IT, LI, | 2010: Acetrax; Euronews; Iplex.pl (Poland)<br>2011: L'Équipe.fr; CNBC Real Tme | AceTrax/ Euronews | |
| **LG Smart TV Application Hub** ❷ | 2010 | From 4 to 13 | AT, CH, DE, ES, FR, GB, IE, IT, PT | 2010: Maxdome in Germany; Orange in France for Orange video portal; Canal+ VOD<br>2011: Videoland | Canal+ / Orange/ Maxdome/ | |
| **Phillips Net TV** ❸ | 2009 | From 6 to 17 | | 2010: RTL Gemist in Netherlands; ARD MediaThek Germany; INA France;<br>2011: CNBC Real Tme | | Phillips Net TV claimed 1 million active users in May 2011 |

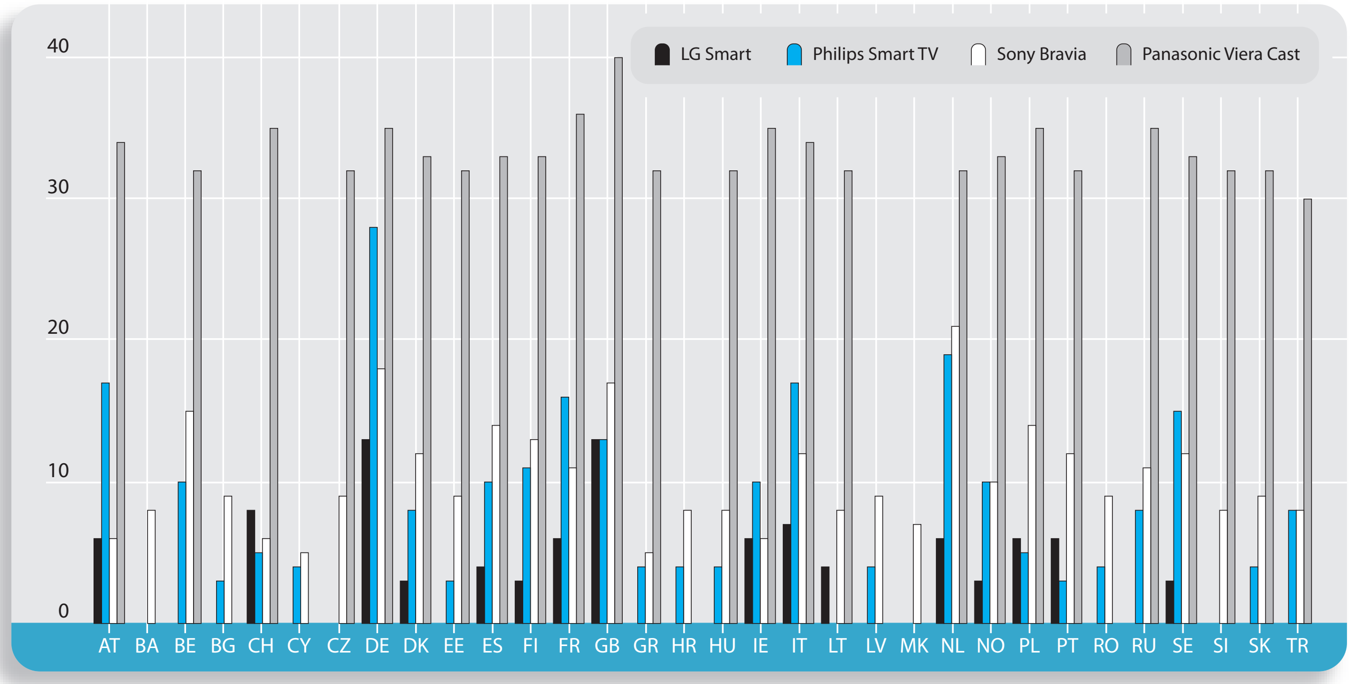
❶ Countries for which details on services and/or dedicated websites are available.
❷ Seems to be also available in the Nordic regions but information is not accessible.
❸ Detailed information not accessible regarding countries available and apps provided.

Source: European Audiovisual Observatory on the basis of information from the websites of the TV manufacturers, press releases and trade press

T.7.15
G.7.6

## Number of on-demand audiovisual services accessible through applications for connected TV February 2012

| Country | LG Smart | Philips Smart TV | Sony Bravia | Panasonic Viera Cast |
|---|---|---|---|---|
| AT | 6 | 17 | 6 | 34 |
| BA | ~ | ~ | 8 | ~ |
| BE | ~ | 10 | 15 | 32 |
| BG | ~ | 3 | 9 | ~ |
| CH | 8 | 5 | 6 | 35 |
| CY | ~ | 4 | 5 | ~ |
| CZ | ~ | ~ | 9 | 32 |
| DE | 13 | 28 | 18 | 35 |
| DK | 3 | 8 | 12 | 33 |
| EE | ~ | 3 | 9 | 32 |
| ES | 4 | 10 | 14 | 33 |
| FI | 3 | 11 | 13 | 33 |
| FR | 6 | 16 | 11 | 36 |
| GB | 13 | 13 | 17 | 40 |
| GR | ~ | 4 | 5 | 32 |
| HR | ~ | 4 | 8 | ~ |
| HU | ~ | 4 | 8 | 32 |
| IE | 6 | 10 | 6 | 35 |
| IT | 7 | 17 | 12 | 34 |
| LT | 4 | ~ | 8 | 32 |
| LV | ~ | 4 | 9 | ~ |
| MK | ~ | ~ | 7 | ~ |
| NL | 6 | 19 | 21 | 32 |
| NO | 3 | 10 | 10 | 33 |
| PL | 6 | 5 | 14 | 35 |
| PT | 6 | 3 | 12 | 32 |
| RO | ~ | 4 | 9 | ~ |
| RU | ~ | 8 | 11 | 35 |
| SE | 3 | 15 | 12 | 33 |
| SI | ~ | ~ | 8 | 32 |
| SK | ~ | 4 | 9 | 32 |
| TR | ~ | 8 | 8 | 30 |




Source: European Audiovisual Observatory

T.7.16
G.7.7

## Consumers expenses for transactional audiovisual services (NVoD, PPV, VoD) 2005-2010 EUR million

**Online:** Purchase or rental of movies and TV series delivered over the open internet through transactional models (also knowns as EST, DTO, Internet VoD) or on a subscription basis.

**Through distribution platform:** The delivery of movies and TV content on a transactional (VoD/NVoD/PPV) basis via cable/satellite/IPTV/DTT services.

| Country | | 2005 | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| BE | Online | 0.0 | 0.0 | 0.2 | 0.4 | 0.4 | 0.3 | -10.90% |
| | Through distribution platform | 2.3 | 6.5 | 11.4 | 20.1 | 35.2 | 45.8 | 30.1% |
| | *Total* | *2.3* | *6.5* | *11.6* | *20.5* | *35.6* | *46.1* | *29.5%* |
| CH | Online | 0.0 | 0.0 | 0.1 | 0.1 | 0.1 | 0.4 | 232.4% |
| | Through distribution platform | 1.3 | 1.6 | 3.0 | 5.5 | 8.7 | 13.9 | 61.5% |
| | *Total* | *1.3* | *1.6* | *3.1* | *5.6* | *8.8* | *14.3* | *62.5%* |
| DE | Online | 2.6 | 4.8 | 7.4 | 13.4 | 29.6 | 52.8 | 78.6% |
| | Through distribution platform | 22.7 | 13.6 | 14.7 | 16.8 | 21.0 | 31.5 | 49.8% |
| | *Total* | *25.3* | *18.4* | *22.1* | *30.2* | *50.6* | *84.3* | *66.6%* |
| DK | Online | 0.1 | 0.2 | 0.4 | 0.7 | 0.7 | 1.2 | 66.6% |
| | Through distribution platform | 3.9 | 5.0 | 5.8 | 6.2 | 2.2 | 4.3 | 97.6% |
| | *Total* | *4.0* | *5.2* | *6.2* | *6.9* | *2.9* | *5.5* | *89.7%* |
| ES | Online | 0.0 | 0.0 | 0.1 | 0.4 | 1.0 | 2.1 | 107.0% |
| | Through distribution platform | 37.5 | 47.9 | 56.3 | 64.1 | 62.6 | 62.9 | 0.5% |
| | *Total* | *37.5* | *47.9* | *56.4* | *64.5* | *63.6* | *65.0* | *2.2%* |
| FI | Online | 0.0 | 0.1 | 0.2 | 0.3 | 0.3 | 0.5 | 57.2% |
| | Through distribution platform | 1.0 | 1.3 | 1.5 | 1.6 | 0.3 | 0.9 | 245.8% |
| | *Total* | *1.0* | *1.4* | *1.7* | *1.9* | *0.6* | *1.4* | *133.3%* |
| FR | Online | 1.5 | 6.1 | 9.3 | 13.7 | 24.8 | 50.1 | 101.9% |
| | Through distribution platform | 92.9 | 100.2 | 123.7 | 145.5 | 164.1 | 194.2 | 18.4% |
| | *Total* | *94.4* | *106.3* | *133.0* | *159.2* | *188.9* | *244.3* | *29.3%* |
| GB | Online | 11.1 | 15.5 | 28.1 | 52.2 | 77.0 | 141.1 | 83.3% |
| | Through distribution platform | 175.6 | 188.3 | 236.8 | 244.7 | 215.1 | 242.5 | 12.8% |
| | *Total* | *186.7* | *203.8* | *264.9* | *296.9* | *292.1* | *383.6* | *31.3%* |
| IE | Online | 0.0 | 0.0 | 0.0 | 0.1 | 0.2 | 2.0 | 883.9% |
| | Through distribution platform | 9.8 | 9.2 | 9.8 | 10.6 | 10.5 | 10.7 | 2.0% |
| | *Total* | *9.8* | *9.2* | *9.8* | *10.7* | *10.7* | *12.7* | *18.7%* |
| IT | Online | 0.1 | 0.2 | 0.5 | 0.6 | 0.9 | 1.9 | 118.3% |
| | Through distribution platform | 53.1 | 81.6 | 96.6 | 109.4 | 91.4 | 95.4 | 4.4% |
| | *Total* | *53.2* | *81.8* | *97.1* | *110.0* | *92.3* | *97.3* | *105.4%* |
| NL | Online | 0.0 | 0.2 | 0.7 | 1.2 | 1.5 | 1.9 | 27.6% |
| | Through distribution platform | 1.0 | 4.6 | 9.6 | 12.3 | 15.3 | 21.7 | 42.1% |
| | *Total* | *1.0* | *4.8* | *10.3* | *13.5* | *16.8* | *23.6* | *40.5%* |
| NO | Online | 0.3 | 0.8 | 1.0 | 0.7 | 0.8 | 1.5 | 83.5% |
| | Through distribution platform | 4.1 | 5.7 | 8.4 | 10.3 | 4.8 | 6.1 | 27.4% |
| | *Total* | *4.4* | *6.5* | *9.4* | *11.0* | *5.6* | *7.6* | *35.7%* |
| PL | Online | – | – | 0.0 | 0.0 | 0.1 | 0.1 | 70.3% |
| | Through distribution platform | – | 0.0 | 0.4 | 1.4 | 3.5 | 14.4 | 308.6% |
| | *Total* | *–* | *0.0* | *0.4* | *1.4* | *3.6* | *14.5* | *302.8%* |
| PT | Online | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 208.0% |
| | Through distribution platform | 15.5 | 15.8 | 17.1 | 19.4 | 26.2 | 37.1 | 41.5% |
| | *Total* | *15.5* | *15.8* | *17.1* | *19.4* | *26.2* | *37.1* | *41.6%* |
| SE | Online | 0.2 | 0.4 | 0.5 | 0.8 | 0.9 | 2.1 | 128.2% |
| | Through distribution platform | 9.1 | 11.1 | 13.5 | 14.8 | 9.3 | 15.7 | 67.9% |
| | *Total* | *9.3* | *11.5* | *14.0* | *15.6* | *10.2* | *17.8* | *74.5%* |
| Western Europe | Online | 15.9 | 28.3 | 48.5 | 84.6 | 138.3 | 258 | 86.6% |
| | Through TV distribution platform | 429.8 | 492.4 | 608.6 | 682.7 | 670.2 | 797.1 | 18.9% |
| | *Total* | *445.7* | *520.7* | *657.1* | *767.3* | *808.5* | *1055.1* | *30.5%* |

Source: data elaborated by IHS Screen Digest for the IVF

T.7.16
G.7.7

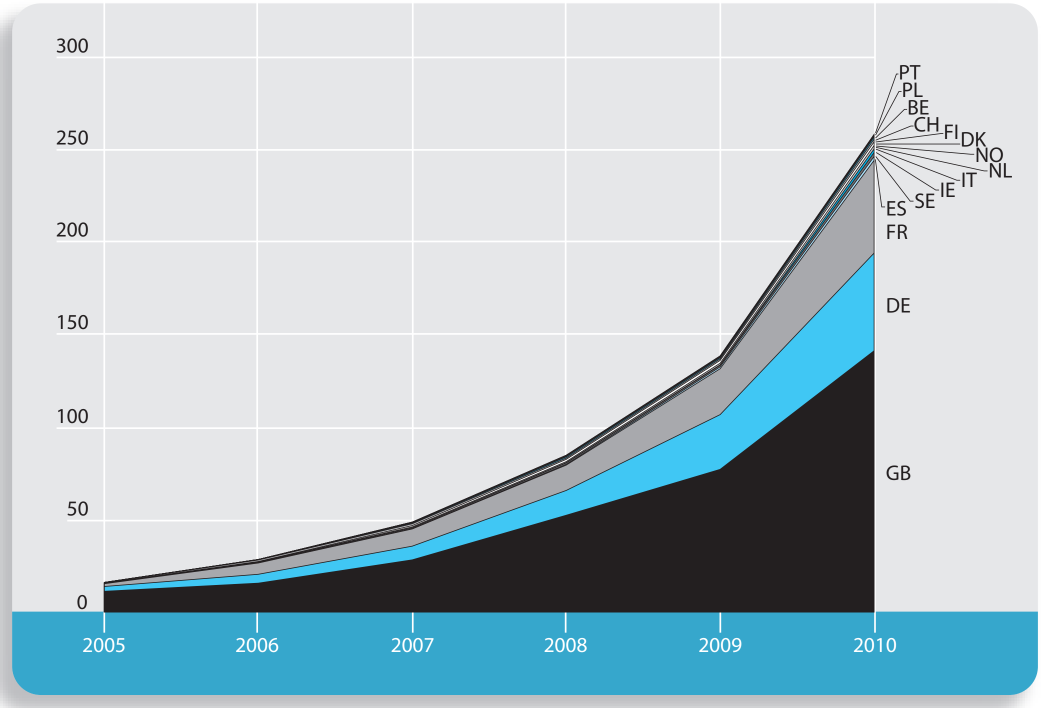
## Consumers expenses for transactional audiovisual services (NVoD, PPV, VoD) (Continued)

### 2005-2010 EUR million

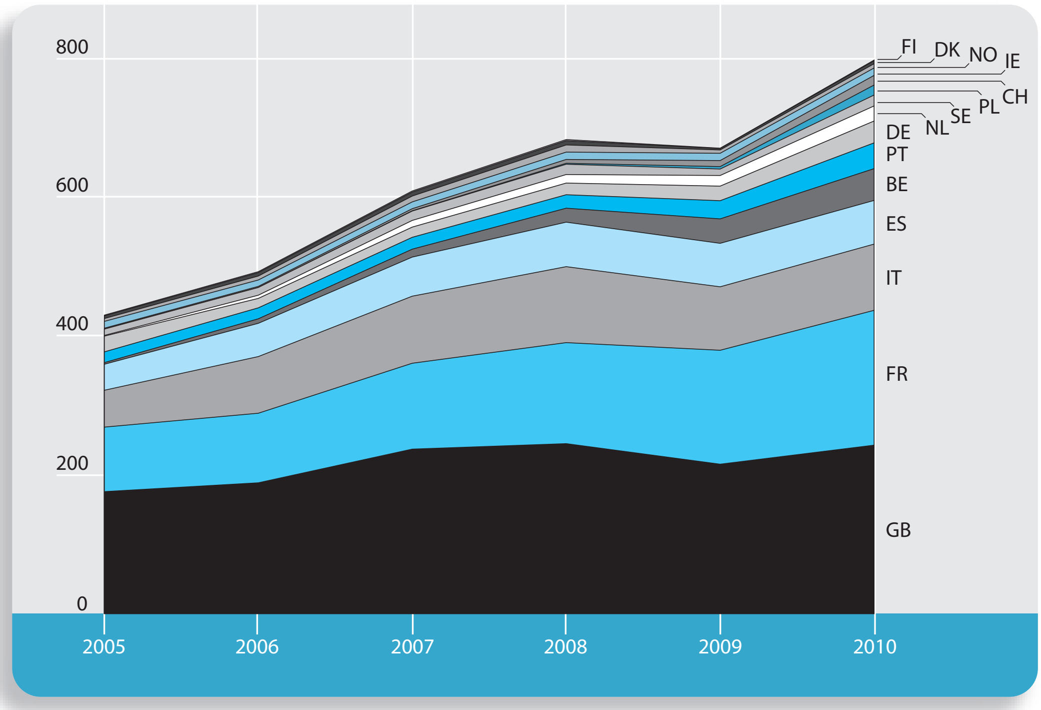
**Online:** Purchase or rental of movies and TV series delivered over the open internet through transactional models (also knowns as EST, DTO, Internet VoD) or on a subscription basis.

**Through distribution platform:** The delivery of movies and TV content on a transactional (VoD/NVoD/PPV) basis via cable/satellite/IPTV/DTT services.

Online expenses (in EUR million)




Through distribution platform expenses (in EUR million)



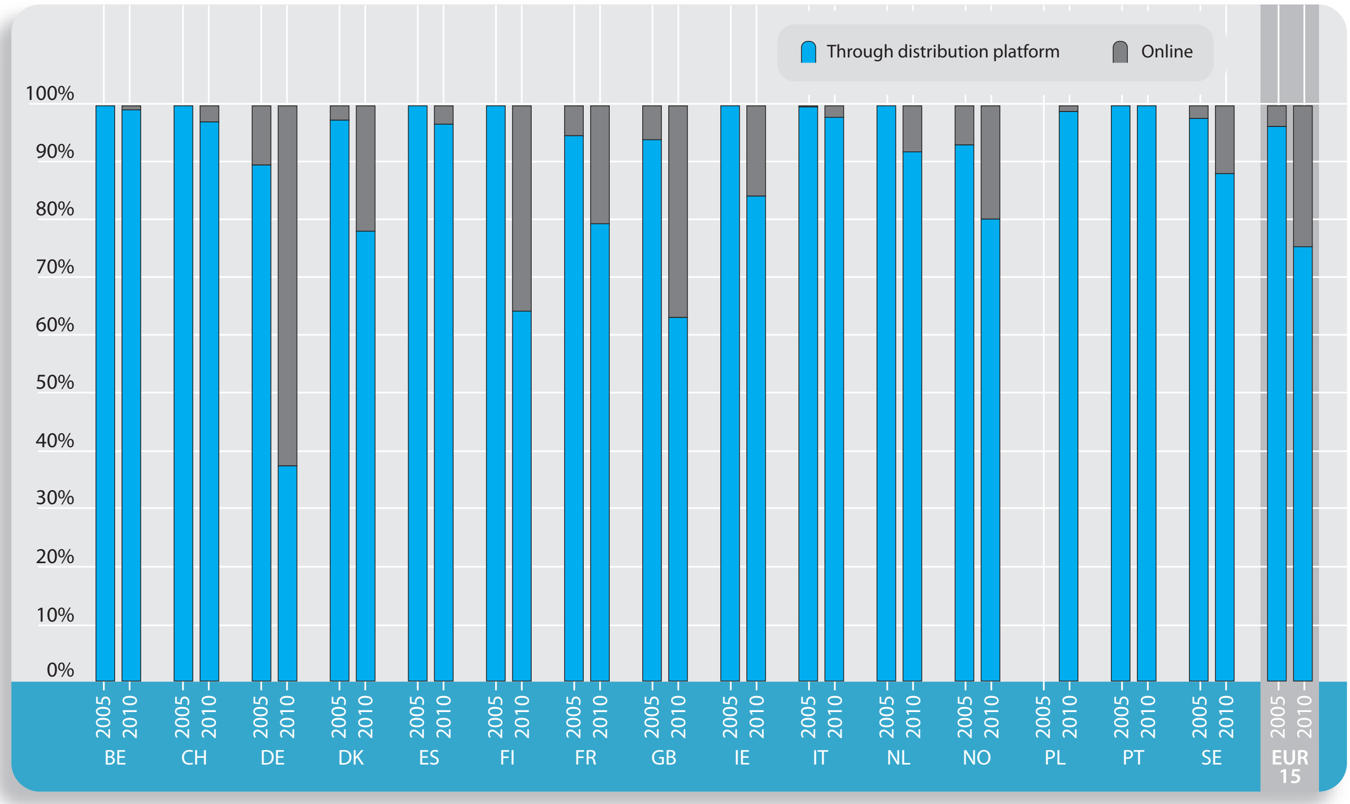

Source: data elaborated by IHS Screen Digest for the IVF

T.7.17
G.7.8

# Relative importance of online, and via distribution platform expenses 2005-2010

In % of total expenses.

| Country | Through distribution platform 2005 | Through distribution platform 2010 | Online 2005 | Online 2010 |
|---|---|---|---|---|
| **BE** | 100.0 | 99.3 | 0.0 | 0.7 |
| **CH** | 100.0 | 97.2 | 0.0 | 2.8 |
| **DE** | 89.7 | 37.4 | 10.3 | 62.6 |
| **DK** | 97.5 | 78.2 | 2.5 | 21.8 |
| **ES** | 100.0 | 96.8 | 0.0 | 3.2 |
| **FI** | 100.0 | 64.3 | 0.0 | 35.7 |
| **FR** | 94.8 | 79.5 | 5.2 | 20.5 |
| **GB** | 94.1 | 63.2 | 5.9 | 36.8 |
| **IE** | 100.0 | 84.3 | 0.0 | 15.7 |
| **IT** | 99.8 | 98.0 | 0.2 | 2.0 |
| **NL** | 100.0 | 92.0 | 0.0 | 8.0 |
| **NO** | 93.2 | 80.30 | 6.8 | 19.7 |
| **PL** | – | 99.0 | – | 1.0 |
| **PT** | 100.0 | 100.0 | 0.0 | 0.0 |
| **SE** | 97.8 | 88.2 | 2.2 | 11.8 |
| | | | | |
| ***EUR 15*** | ***96.4*** | ***75.5*** | ***3.6*** | ***24.5*** |




Source: European Audiovisual Observatory from IVF, IHS Screen Digest data

2 3 4 5 6 7 8 9

T.7.18

## Online TV revenues in 5 large European markets 2006-2010 EUR million

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **Digital retail online TV revenue** | | | | | | |
| **DE** | 0.0 | 0.0 | 2.2 | 3.7 | 10.0 | ***171.1%*** |
| **ES** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***10.7%*** |
| **FR** | 0.1 | 0.2 | 1.5 | 4.6 | 11.2 | ***144.7%*** |
| **GB** | 0.1 | 3.4 | 15.1 | 19.3 | 50.4 | ***161.6%*** |
| **IT** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| ***Total*** | ***0.2*** | ***3.7*** | ***18.8*** | ***27.5*** | ***71.6*** | ***160.1%*** |
| **Pay per view online TV revenue** | | | | | | |
| **DE** | 0.1 | 0.7 | 1.2 | 5.8 | 7.0 | ***19.8%*** |
| **ES** | 0.0 | 0.0 | 0.0 | 0.1 | 0.1 | ***20.8%*** |
| **FR** | 1.1 | 2.2 | 3.0 | 5.0 | 4.2 | ***-16.7%*** |
| **GB** | 0.5 | 2.9 | 4.4 | 5.2 | 6.0 | ***16.1%*** |
| **IT** | 0.0 | 0.1 | 0.1 | 0.3 | 0.2 | ***-18.9%*** |
| ***Total*** | ***1.8*** | ***5.9*** | ***8.7*** | ***16.4*** | ***17.5*** | ***6.8%*** |
| **Subscription online TV revenue** | | | | | | |
| **DE** | 0.2 | 0.6 | 2.6 | 4.9 | 5.5 | ***14.2%*** |
| **ES** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***82.1%*** |
| **FR** | 0.1 | 0.2 | 0.3 | 0.6 | 1.1 | ***82.0%*** |
| **GB** | 12.4 | 17.1 | 18.8 | 20.0 | 23.7 | ***18.4%*** |
| **IT** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| ***Total*** | ***12.6*** | ***17.9*** | ***21.7*** | ***25.5*** | ***30.4*** | ***19.2%*** |
| **Free to view online TV revenue** | | | | | | |
| **DE** | 2.6 | 6.6 | 13.9 | 27.8 | 34.6 | ***24.4%*** |
| **ES** | 0.2 | 0.3 | 1.6 | 4.4 | 6.5 | ***48.9%*** |
| **FR** | 1.9 | 5.2 | 11.2 | 24.2 | 54.4 | ***124.9%*** |
| **GB** | 3.2 | 8.2 | 23.9 | 43.0 | 96.4 | ***124.5%*** |
| **IT** | 0.1 | 0.4 | 1.4 | 4.4 | 21.4 | ***387.2%*** |
| ***Total*** | ***8.0*** | ***20.6*** | ***52.1*** | ***103.8*** | ***213.4*** | ***105.7%*** |

Source: Screen Digest

T.7.19

## Film online revenues in Europe by business model 2006-2010 EUR million

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **Digital rental online** | | | | | | |
| **AT** | 0.0 | 0.0 | 0.0 | 0.1 | 0.2 | ***261.9%*** |
| **BE** | 0.0 | 0.0 | 0.1 | 0.2 | 0.2 | ***42.7%*** |
| **CH** | 0.0 | 0.0 | 0.0 | 0.1 | 0.3 | ***194.6%*** |
| **CZ** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***-3.2%*** |
| **DE** | 3.3 | 4.1 | 5.2 | 7.9 | 12.8 | ***62.8%*** |
| **DK** | 0.2 | 0.3 | 0.5 | 0.5 | 0.9 | ***59.2%*** |
| **ES** | 0.0 | 0.0 | 0.2 | 0.6 | 1.2 | ***84.9%*** |
| **FI** | 0.1 | 0.2 | 0.2 | 0.2 | 0.3 | ***64.8%*** |
| **FR** | 3.8 | 4.5 | 6.1 | 9.6 | 18.8 | ***95.8%*** |
| **GB** | 0.1 | 0.6 | 2.8 | 7.3 | 14.6 | ***100.3%*** |
| **GR** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***2.6%*** |
| **HU** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***16.9%*** |
| **IE** | 0.0 | 0.0 | 0.1 | 0.2 | 0.7 | ***311.8%*** |
| **IT** | 0.1 | 0.2 | 0.3 | 0.3 | 0.9 | ***153.0%*** |
| **NL** | 0.1 | 0.2 | 0.5 | 0.7 | 1.1 | ***44.8%*** |
| **NO** | 0.6 | 0.8 | 0.5 | 0.5 | 1.0 | ***85.7%*** |
| **PL** | 0.0 | 0.0 | 0.0 | 0.1 | 0.1 | ***57.5%*** |
| **PT** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***942.2%*** |
| **SE** | 0.2 | 0.2 | 0.5 | 0.6 | 1.3 | ***122.4%*** |
| ***Total*** | ***8.4*** | ***11.2*** | ***17.3*** | ***28.9*** | ***54.4*** | ***87.9%*** |

T.7.19

## Film online revenues in Europe by business model (Continued)
2006-2010 EUR million

| Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| **Digital retail online movie revenue in Europe** | | | | | | |
| **AT** | 0.0 | 0.1 | 0.0 | 0.0 | 0.1 | ***11 953.0%*** |
| **BE** | 0.0 | 0.1 | 0.2 | 0.1 | 0.0 | ***-80.1%*** |
| **CH** | 0.0 | 0.1 | 0.0 | 0.0 | 0.1 | ***1118.6%*** |
| **CZ** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***51.7%*** |
| **DE** | 0.1 | 0.3 | 0.5 | 6.8 | 15.1 | ***121.8%*** |
| **DK** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***159.6%*** |
| **ES** | 0.0 | 0.1 | 0.1 | 0.2 | 0.6 | ***181.8%*** |
| **FI** | 0.0 | 0.0 | 0.0 | 0.1 | 0.1 | ***33.6%*** |
| **FR** | 0.2 | 1.2 | 1.3 | 2.5 | 10.2 | ***310.6%*** |
| **GB** | 0.1 | 0.2 | 4.9 | 17.5 | 30.6 | ***75.1%*** |
| **GR** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| **HU** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***20.0%*** |
| **IE** | 0.0 | 0.0 | 0.0 | 0.0 | 1.1 | ***18 868.5%*** |
| **IT** | 0.0 | 0.1 | 0.1 | 0.1 | 0.6 | ***333.0%*** |
| **NL** | 0.1 | 0.4 | 0.5 | 0.5 | 0.5 | ***2.0%*** |
| **NO** | 0.0 | 0.0 | 0.0 | 0.0 | 0.1 | ***310.2%*** |
| **PL** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | ***-100.0%*** |
| **PT** | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | – |
| **SE** | 0.1 | 0.2 | 0.1 | 0.1 | 0.3 | ***119.5%*** |
| ***Total*** | ***0.7*** | ***2.7*** | ***7.8*** | ***28.0*** | ***59.3*** | ***112.1%*** |
| **Subscription online movie revenue in Europe** | | | | | | |
| **AT** | 0.00 | 0.00 | 0.00 | 0.01 | 0.01 | ***130.94%*** |
| **BE** | 0.00 | 0.00 | 0.01 | 0.01 | 0.02 | ***90.29%*** |
| **CH** | 0.00 | 0.00 | 0.00 | 0.01 | 0.01 | ***90.59%*** |
| **CZ** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | ***30.71%*** |
| **DE** | 0.62 | 1.07 | 2.44 | 1.82 | 2.11 | ***16.29%*** |
| **DK** | 0.01 | 0.01 | 0.02 | 0.04 | 0.11 | ***155.47%*** |
| **ES** | 0.00 | 0.00 | 0.00 | 0.00 | 0.04 | ***967.31%*** |
| **FI** | 0.00 | 0.00 | 0.00 | 0.01 | 0.02 | ***96.47%*** |
| **FR** | 0.02 | 0.02 | 0.12 | 0.33 | 0.42 | ***27.28%*** |
| **GB** | 0.01 | 0.02 | 0.02 | 0.10 | 0.37 | ***261.58%*** |
| **GR** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | ***74.19%*** |
| **HU** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | ***-1.05%*** |
| **IE** | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | ***335.41%*** |
| **IT** | 0.01 | 0.02 | 0.02 | 0.00 | 0.01 | ***156.47%*** |
| **NL** | 0.01 | 0.01 | 0.01 | 0.01 | 0.03 | ***238.89%*** |
| **NO** | 0.01 | 0.02 | 0.02 | 0.05 | 0.11 | ***130.28%*** |
| **PL** | 0.00 | 0.00 | 0.00 | 0.00 | 0.02 | ***415.42%*** |
| **PT** | 0.00 | 0.00 | 0.00 | 0.00 | 0.01 | ***199.40%*** |
| **SE** | 0.01 | 0.01 | 0.01 | 0.05 | 0.17 | ***268.60%*** |
| ***Total*** | ***0.70*** | ***1.19*** | ***2.68*** | ***2.44*** | ***3.46*** | ***41.76%*** |

Source: Screen Digest

Chapter
Chapitre
*Kapitel*
8

# Television and online video audience trends

# Tendance de l'audience télévision et vidéo en ligne

# *Reichweitentrends bei Fernsehen und Online-Video*

| Contents | Sommaire | *Inhalt* | |
|---|---|---|---|

## 2010: Global viewing time slightly down

After several years of continuous increases, television viewing time worldwide went down slightly in 2010, dropping from 192 to 190 minutes [1] (a figure nonetheless higher than that recorded in 2008). This decrease can be partly explained by the decline in television viewing time in China (seven minutes less in 2010 compared with the previous year). At the European level, the average viewing time posted a new record, reaching 228 minutes, compared with 222 in 2009.

There are different developments from one country to another, as table T.8.1 shows. The average viewing time has gone down in four countries. Latvia recorded the only significant drop (-8 minutes), while in Switzerland, Turkey and the Russian Federation it was only 2 minutes. On the other hand, it increased significantly in most of Europe, where viewer profiles or habits are different. For example, the already very high TV consumption in the countries of Central and Eastern Europe continued to rise considerably in 2010, with +20 minutes recorded in Bulgaria and +19 minutes in Hungary. In countries where it is traditionally lower, such as Denmark, it rose from 151 minutes in 2006 to 201 in 2010. Curiously, in 2010 (and contrary to the previous year) it recorded big rises in the major Western European audiovisual markets: 17 +minutes in the United Kingdom, +11 minutes in Germany, +8 minutes in Spain and Italy and +7 minutes in France.

The increase in viewing time in the majority of European countries, including the most important, can mainly be explained by the global sports events held in 2010: the Vancouver Winter Olympics in February and the FIFA Football World Cup in June.

### Transmedia television

The massive penetration of the Internet in European homes via broadband networks, the digitisation of households, the rapid increase in the number of VDUs and entertainment devices, the rise of social networks and the viewer's supposed desire to be free from the constraints of linear programme schedules are calling into question the organisational models of the traditional television sector. However, it is by no means the case that these different screens will cannibalise one another, and these changes constitute new opportunities and provide ways of achieving synergies.

## 2010 : l'écoute mondiale en légère baisse

Après plusieurs années de hausse consécutive, la durée d'écoute de la télévision au niveau mondial accuse une légère décroissance en 2010, passant de 192 à 190 minutes [1] (un niveau toutefois plus élevé que celui de 2008). Cette baisse s'explique en partie par la contraction de la durée d'écoute de la télévision en Chine (sept minutes de moins en 2010 par rapport à l'année précédente). Au niveau européen, la durée d'écoute moyenne enregistre un nouveau record, atteignant 228 minutes, contre 222 en 2009.

Les évolutions sont contrastées d'un pays à l'autre, comme le montre le tableau T.8.1. La durée d'écoute moyenne régresse dans 4 pays. La Lettonie enregistre la seule baisse sensible (-8 minutes), la Suisse, la Turquie et la Fédération de Russie ne perdant que 2 minutes. A l'inverse, la durée moyenne d'écoute progresse sensiblement dans la plupart des pays européens, présentant des profils ou habitudes d'écoute différents. Ainsi, la durée d'écoute, souvent déjà très élevée dans les pays d'Europe centrale ou orientale, continue d'y enregistrer d'importantes progressions encore en 2010 : + 20 minutes en Bulgarie, +19 minutes en Hongrie. Les durées d'écoute continuent aussi de progresser dans des pays où elles sont traditionnellement moins importantes comme le Danemark, qui a vu sa durée d'écoute passer de 151 minutes en 2006 à 201 en 2010. De manière originale, en 2010, contrairement à l'année précédente, la durée d'écoute enregistre des hausses notables dans les grands marchés audiovisuels d'Europe de l'ouest, à savoir le Royaume-Uni (+17 minutes), l'Allemagne (+11 minutes), l'Espagne et l'Italie (+8 minutes) et la France (+7 minutes).

La progression de la durée d'écoute dans la plupart des marchés européens, y compris les plus importants, s'explique principalement par la tenue d'événements sportifs d'envergure mondiale en 2010 : les jeux Olympiques de Vancouver en février puis la coupe du monde de la FIFA (football) en juin.

### La télévision transmédia

L'irruption d'Internet via les réseaux large bande dans les foyers européens, la numérisation des foyers, la multiplication des écrans et des supports de divertissement, l'essor des réseaux sociaux ou encore la volonté supposée des spectateurs de s'émanciper des grilles de programmes linéaires remettent en cause les modèles traditionnels d'organisation de la télévision dite traditionnelle. Mais, loin de la cannibalisation entre les différents écrans,

## *2010: Sehdauer weltweit leicht rückläufig*

Nach mehreren aufeinanderfolgenden Jahren des Anstiegs verzeichnete die Sehdauer beim Fernsehen 2010 weltweit einen leichten Rückgang von 192 auf 190 Minuten [1] (was allerdings immer noch mehr als 2008 war). Diese Abnahme erklärt sich teilweise durch die geringere TV-Einschaltdauer in China (sieben Minuten weniger 2010 als im Vorjahr). In Europa erreichtte die durchschnittliche Sehdauer mit 228 Minuten (2009 waren es 222) einen neuen Rekord.

Die Entwicklung verläuft von Land zu Land unterschiedlich, wie Tabelle T.8.1 zeigt. Die durchschnittliche Sehdauer ging in vier Ländern zurück. Nur in Lettland war der Rückgang mit -8 Minuten deutlich, während die Schweiz, die Türkei und die Russische Föderation nur 2 Minuten verloren. Umgekehrt stieg die durchschnittliche Sehdauer in den meisten europäischen Ländern spürbar an, in denen es andere Einschaltprofile oder -gewohnheiten gibt. So nahm auch 2010 die häufig bereits schon hohe Einschaltdauer in den Ländern Mittel- und Osteuropas weiter deutlich zu: +20 Minuten in Bulgarien, +19 in Ungarn. Die Sehdauer stieg auch in Ländern weiter an, in denen sie traditionell nicht so hoch ist, wie Dänemark, mit einem Anstieg von 151 Minuten 2006 auf 201 Minuten 2010. Es fällt auf, dass die Sehdauer 2010 in den großen audiovisuellen Märkten in Westeuropa im Unterschied zum Vorjahr beträchtlich zunahm: im Vereinigten Königreich (+17 Minuten), in Deutschland (+11), Spanien und Italien (+8) sowie Frankreich (+7).

Die steigende Sehdauer in den meisten europäischen Märkten, einschließlich der größten, lässt sich im Wesentlichen durch weltweit bedeutende Sportereignisse im Jahr 2010 erklären: die Olympischen Winterspiele in Vancouver im Februar und die FIFA-Fußballweltmeisterschaft im Juni.

### *Transmediales Fernsehen*

Der Einzug des Internet in die europäischen Wohnzimmer über die Breitbandnetze, die Digitalisierung der Haushalte, die Vervielfachung der Empfangsmöglichkeiten und der Unterhaltungsträger, der Boom der sozialen Netzwerke oder auch der vermutete Wunsch der Zuschauer nach Unabhängigkeit vom linearen Programmangebot stellen die Organisationsmodelle des sogenannten traditionellen Fernsehsektors in Frage. Aber anstatt zu einem ruinösen Wettbewerb führen diese Veränderungen zu neuen Chancen und möglichen Synergieeffekten.

Um sich an diese neue Situation anzupassen, haben die Rundfunkveranstalter

[1] Eurodata TV Worldwide "One TV Year in the World – ed. 2011", March 2011.

In order to adapt to this new order, broadcasters have established strategies to prolong the availability of their content online, primarily via catch-up television services. For example, the national audience measurement institutes are increasingly reporting on the time-shifted audience. The 2010 data in table T.8.1 already include the measurement of the timeshifted audience in eleven countries. New countries, such as France and Poland, introduced such systems in 2011. However, it should be noted that the lack of a universal standard in this area implies that the definition of a timeshifted audience differs from one institute, and therefore from one country, to another.

Apart from the timeshifted viewing of programmes, the new technologies open up new development prospects for the television industry. For example, both the advent of social networks and multi platform viewing (TV and Internet) by teenagers and young adults are encouraging content producers to adapt their formats and distributors to reconsider their methods of providing services in order to create and adapt to the new usages. New features are emerging, such as social games, voting on Facebook, *twittersodes* (episodes on Twitter) and the possibility of playing along online (playing a game simultaneously with the show in real time). [2]

## The success of local content

American programmes and formats have retained their prime position in European TV programme schedules and in the list of the most-watched programmes. However, several European audiovisual markets are witnessing a strong resurgence of local content, whether it be original creations or local adaptations of international formats, "today's TV viewers all over the world are looking for more proximity". [3]

## The contrasting situations of public service television

Table T.8.2 outlines the accumulated market shares of public service broadcasters in the various European countries. Public-service television has more than a 30% market share in the countries of Western Europe and the Nordic countries: 33% in France and Spain, 36% in the Netherlands, over 40% in Norway, Italy and Germany and as much as 48% in the United Kingdom and 63% in Denmark. The situation of the public-service television channels in central and eastern Europe seems to be completely different: the daily audience of the public service broadcasters does not reach 20% in the Baltic countries, Hungary and Greece, and the weakest market

ces mutations représentent de nouvelles opportunités et véhiculent des possibilités de synergies.

Afin de s'adapter à cette nouvelle donne, les radiodiffuseurs ont mis en place des stratégies de prolongation de leurs contenus en ligne, en premier lieu, à travers des services de télévision de rattrapage. Ainsi, les instituts nationaux de mesure d'audience rendent de plus en plus compte de l'audience dite différée. Les données 2010 du tableau T.7.1. incluent déjà la mesure de l'audience différée dans onze pays. De nouveaux pays ont introduit au cours de l'année 2011 de tels systèmes, comme la France ou la Pologne. Il est à noter toutefois que les définitions de l'audience différée ne sont pas harmonisées d'un institut et donc d'un pays à l'autre, en l'absence d'un standard universel en la matière.

Au-delà de la seule vision différée de programmes, les nouvelles technologies ouvrent d'autres perspectives de développements pour l'industrie télévisuelle. Ainsi l'avènement des réseaux sociaux et les pratiques multi-écrans (TV & Internet) des adolescents et jeunes adultes poussent les producteurs de contenus à adapter leurs formats et les distributeurs à repenser leurs modes de fourniture de services pour créer et s'adapter aux nouveaux usages. De nouveaux dispositifs émergent, comme les « jeux sociaux, votes sur Facebook, *twittersodes* (épisodes sur twitter) ou encore play along (jeu en ligne simultané au programme TV) ». [2]

## Le succès des contenus locaux

Les programmes et formats américains conservent une place de choix dans les grilles de programmation des chaînes de télévision européennes et dans les palmarès des programmes les plus regardés. Toutefois, plusieurs marchés audiovisuels européens assistent au retour en force des contenus locaux, qu'il s'agissent de créations originales ou d'adaptations locales de formats internationaux : *« les téléspectateurs du monde entier cherchent aujourd'hui davantage de proximité »*. [3]

## Les situations contrastées de la télévision publique

Le tableau T.8.2. présente les parts de marché cumulées des radiodiffuseurs publics dans les différents pays européens. La télévision publique dépasse les 30 % de part de marché dans les pays d'Europe occidentale ou dans les pays Nordiques : 33 % en France et en Espagne, 36 % aux Pays-Bas, plus de 40 % en Norvège, Italie ou en Allemagne, et jusqu'à 48 % au Royaume-Uni et 63 % au Danemark. La situation des chaînes de télévision publiques en Europe

Strategien ausgearbeitet, mit denen sie ihre Inhalte online länger anbieten können, in erster Linie über das „*Catch-up*-TV" in ihren Mediatheken. So berücksichtigen die nationalen Fernsehforschungsinstitute jetzt auch immer häufiger dieses sogenannte zeitversetzte Fernsehen. Die Daten von 2010 in Tabelle T.7.1 enthalten bereits die zeitversetzte Nutzung in elf Ländern. Weitere Länder haben 2011 solche Systeme eingeführt, wie Frankreich oder Polen. Da es in diesem Bereich jedoch keinen allgemeinen Standard gibt, sind die Definitionen von „zeitversetztem Fernsehen" von Institut zu Institut und damit auch von Land zu Land verschieden.

Abgesehen vom bloßen zeitversetzten Fernsehen eröffnen die neuen Technologien noch weitere Perspektiven für die Entwicklung der Fernsehindustrie. So drängen das Aufkommen sozialer Netzwerke und die vielfachen in der Praxis genutzten Empfangsmöglichkeiten (TV und Internet) der Teenager und jungen Erwachsenen die Produzenten von Inhalten dazu, ihre Formate anzupassen, und die Vertreiber denken darüber nach, mit welchem Diensteangebot sie neue Nutzungsmöglichkeiten schaffen bzw. sich an die neuen Gegebenheiten anpassen können. So entstehen neue Angebote, wie die „sozialen Spiele, Abstimmungen auf Facebook, *Twittersodes* (Episoden auf Twitter) oder auch play along (Onlinespiel zeitgleich zum laufenden TV-Programm)". [2]

## *Erfolg der lokalen Inhalte*

Die amerikanischen Programme und Formate konnten ihren herausragenden Platz im Programmschema der europäischen Fernsehsender und im Ranking der erfolgreichsten Programme halten. Allerdings erlebten mehrere europäische Fernsehmärkte eine massive Rückkehr der lokalen Inhalte, ob Eigenproduktionen oder lokale Adaptationen internationaler Formate: „*Die Fernsehzuschauer in der ganzen Welt suchen heutzutage mehr Bezug zum eigenen Umfeld*". [3]

## *Kontrastreiche Situation beim öffentlich-rechtlichen Fernsehen*

Tabelle T.8.2 zeigt die kumulierten Marktanteile der öffentlichrechtlichen Rundfunkanstalten in den verschiedenen europäischen Ländern. Das öffentlich-rechtliche Fernsehen kam in den Ländern Westeuropas und Skandinaviens auf einen Marktanteil von über 30 %: 33 % in Frankreich und Spanien, 36 % in den Niederlanden, über 40 % in Norwegen, Italien oder Deutschland, bis zu 48 % im Vereinigten Königreich sowie 63 % in Dänemark. Diese Situation erscheint in Mittel- und Osteuropa ganz anders: Die

[2] Eurodata TV Worldwide "From Transgenre to Transmedia : Television Reinvented", press release September 2011.
[3] Eurodata TV Worldwide "Universal programs, multiple television", press release January 2012.

share of all is that of the public-service channels in Romania, with just 7.1%, a figure that has remained stable for three years. Two Eastern European countries are exceptions to this situation: Poland (where TVP's public service channels have a market share close to 40%) and Croatia (where HTV1 and HTV2 have 39% of the audience).

In 2010, the public service broadcasters' market share went down in 18 European countries or territories but rose in 14 others. The most spectacular increase was in Sweden (+2.3 percentage points) and the most significant falls took place in Croatia, where the public service channels lost 5.6 percentage points, and Denmark (-3.6 percentage points).

### The funding and success of public service TV

Graph G.8.1 reveals a detailed typology of countries on the basis of the audience share of their public channels and the origin of the funding of the public service broadcasters. There are three major categories of countries:

- those where the public service broadcasters are mainly financed from public funds (>80% of their revenue) and have a significant market share (>30%): this group consists of Germany, Spain, France, the Netherlands, Sweden and Finland.
- those where the public service broadcasters are more or less financed from public funds (between 60 and 95% of their revenue) and where their market share is also lower (<30%): this category mainly comprises countries in Central and Eastern Europe (Romania, Bulgaria, Hungary and the Baltic countries) as well as Greece and Portugal.
- those where the public service broadcasters are to a lesser extent financed from public funds (<65%) but manage to capture a significant audience market share (>35%): the United Kingdom, Italy, Ireland and Austria. Poland and Denmark are extreme cases in this category: Poland because TVP's public funding has dropped to a very low level (20.4%) and Denmark because the audience market share of all the channels of the two public service broadcasters (DR and TV2) is still very high (62.9%).

centrale et orientale paraît complètement différente : les radiodiffuseurs publiques réunis n'atteignent pas 20 % de l'audience quotidienne dans les pays baltes, en Hongrie, en Grèce, la plus faible part de marché étant celle des télévisions publiques roumaines avec seulement 7,1 %, un chiffre stable depuis trois ans. Deux pays d'Europe de l'est font toutefois figure d'exception : la Pologne (où les chaînes publiques de la TVP regroupent près de 40 % de part de marché) et la Croatie (où HTV1 et HTV2 représentent 39 % de l'audience).

En 2010, la part de marché des radiodiffuseurs publics décroît dans 18 pays ou territoires européens, et progresse à l'inverse dans 14 autres. La progression la plus spectaculaire s'est produite en Suède (+2,3 points), et les reculs les plus importants ont eu lieu en Croatie, où les chaînes publiques ont perdu 5,6 points, et au Danemark (-3,6 points).

### Financement et succès des TV publiques

Le graphique G.8.1. fait apparaître une typologie détaillée des pays en fonction de l'audience de leurs chaînes publiques et de l'origine du financement des radiodiffuseurs publics. On peut distinguer trois grandes catégories de pays :

- Les pays où les radiodiffuseurs publics sont largement financés par des fonds publics (>80 % de leurs revenus) et regroupant une part de marché d'audience significative (>30 %) : dans ce groupe se trouvent l'Allemagne, l'Espagne, la France, les Pays-Bas, la Suède ou encore la Finlande.
- Les pays où les radiodiffuseurs publics sont plus ou moins soutenus par les financements publics (entre 60 et 95 % des revenus) et où leur part de marché est aussi moins importante (<30 %) : cette catégorie regroupe principalement des pays d'Europe centrale et orientale (Roumanie, Bulgarie, Hongrie, pays baltes), mais aussi la Grèce et le Portugal.
- Les pays où les radiodiffuseurs publics sont moins soutenus par les financements publics (<65 %) mais parviennent à réunir une part de marché d'audience significative (>35 %) : Royaume-Uni, Italie, Irlande et Autriche. La Pologne et le Danemark représentent des cas extrêmes de cette catégorie : la Pologne parce que la part de financement public de la TVP est devenu très faible (20,4 %) et le Danemark parce que la part de marché de l'ensemble des chaînes des deux diffuseurs publics (DR et TV2) continue de récolter une part très élevée du marché de l'audience (62,9 %).

öffentlich-rechtlichen Rundfunkanstalten blieben in den baltischen Staaten, Ungarn und Griechenland unter 20 % der täglichen Zuschauer, wobei der niedrigste Marktanteil vom öffentlich-rechtlichen Fernsehen in Rumänien mit gerade einmal 7,1 % erzielt wurde, einem seit drei Jahren stabilen Wert. Zwei Länder Osteuropas stellten weiterhin eine Ausnahme dar: Polen (wo die öffentlich-rechtlichen Sender von TVP zusammen einen Marktanteil von fast 40 % erzielten) und Kroatien (wo HTV1 und HTV2 auf 39 % der Zuschauer kamen).

Der Marktanteil der öffentlich-rechtlichen Rundfunkveranstalter ging 2010 in 18 europäischen Ländern oder Gebieten zurück und stieg umgekehrt in 14 anderen an. Der spektakulärste Anstieg war in Schweden zu verzeichnen (+2,3 Punkte), der stärkste Rückgang in Kroatien, wo die öffentlich-rechtlichen Sender 5,6 Punkte verloren, sowie in Dänemark (-3,6 Punkte).

### *Finanzierung und Erfolg des öffentlich-rechtlichen Fernsehens*

Die Grafik G.8.1 zeigt eine Unterteilung der Länder nach dem Zuschauermarktanteil ihrer öffentlichrechtlichen Sender und nach der Finanzierungsquelle der öffentlichrechtlichen Rundfunkveranstalter. Drei große Kategorien von Ländern lassen sich unterscheiden:

- Länder, in denen die öffentlich-rechtlichen Sender weitgehend über öffentliche Gelder finanziert werden (>80 % ihrer Einnahmen) und gemeinsam einen signifikanten Zuschauermarktanteil erzielen (>30 %): In dieser Gruppe finden sich Deutschland, Frankreich, Finnland, die Niederlande, Schweden oder auch Spanien.
- Länder, in denen die öffentlich-rechtlichen Sender mehr oder weniger über öffentliche Gelder finanziert werden (zwischen 60 und 95 % der Einnahmen), sie aber nur auf einen niedrigeren Marktanteil kommen (<30 %): Diese Kategorie umfasst Länder Mittel- und Osteuropas (Bulgarien, Rumänien, Ungarn, die baltischen Staaten), aber auch Griechenland und Portugal.
- Länder, in denen die öffentlich-rechtlichen Sender weniger stark über öffentliche Gelder finanziert werden (<65 %), sie aber auf einen signifikanten Marktanteil kommen (>35 %): Irland, Italien, Österreich und Vereinigtes Königreich. Polen und Dänemark sind in dieser Gruppe Extremfälle: Polen, weil der Anteil öffentlicher Mittel an der Finanzierung von TVP sehr stark zurückgegangen ist (auf 20,4 %) und Dänemark, weil der Marktanteil aller Sender der beiden öffentlich-rechtlichen Rundfunkveranstalter (DR und TV2) weiterhin sehr hoch ist (62,9 %).

Source: European Audiovisual Observatory

T.8.1

## Average television viewing per person in Europe 2006-2010

Minutes/day.

| Country | | Target age group | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| **AT** | DEI | 3+ | 154 | 149 | 148 | 145 | 152 | ***4.8%*** |
| **BE (CFR)** | DEI | 4+ | 205 | 199 | 197 | 198 | 203 | ***2.5%*** |
| **BE (VLG)** | DEI | 4+ | 166 | 170 | 164 | 160 | 174 | ***8.8%*** |
| **BG** | DEI | 4+ | 217 | 217 | 210 | 221 | 241 | ***9.0%*** |
| **CH (Al.)** | DEI | 3+ | 146 | 139 | 141 | 145 | 143 | ***-1.4%*** |
| **CH (It.)** | DEI | 3+ | 180 | 173 | 185 | 188 | 186 | ***-1.1%*** |
| **CH (Ro.)** | DEI | 3+ | 170 | 163 | 167 | 161 | 162 | ***0.6%*** |
| **CZ** | DEI | 4+ | 196 | 184 | 188 | 190 | 191 | ***0.5%*** |
| **CY** | DEI | 4+ | 171 | 175 | 177 | 169 | 184 | ***8.9%*** |
| **DE** | DEI | 3+ | 212 | 208 | 207 | 212 | 223 | ***5.2%*** |
| **DK** | DEI | 3+ | 151 | 148 | 167 | 189 | 201 | ***6.3%*** |
| **EE** | DEI | 4+ | 231 | 232 | 234 | 234 | 235 | ***0.4%*** |
| **ES** | DEI | 4+ | 217 | 223 | 227 | 226 | 234 | ***3.5%*** |
| **FI** | DEI | 4+ | 169 | 166 | 170 | 170 | 172 | ***1.2%*** |
| **FR** | DEI | 4+ | 204 | 207 | 204 | 205 | 212 | ***3.4%*** |
| **GB** | DEI | 4+ | 216 | 218 | 225 | 225 | 242 | ***7.6%*** |
| **GR** | DEI | 4+ | 252 | 248 | 252 | 264 | 274 | ***3.8%*** |
| **HR** | DEI | 4+ | 266 | 256 | 248 | 263 | 269 | ***2.3%*** |
| **HU** | DEI | 4+ | 263 | 259 | 260 | 265 | 284 | ***7.2%*** |
| **IE** | DEI | 4+ | 182 | 181 | 186 | 185 | 196 | ***5.9%*** |
| **IT** | DEI | 4+ | 239 | 230 | 234 | 238 | 246 | ***3.4%*** |
| **LT** | DEI | 4+ | 192 | 202 | 203 | 206 | 207 | ***0.5%*** |
| **LV** | DEI | 4+ | 206 | 202 | 213 | 223 | 215 | ***-3.6%*** |
| **MK** | DEI | 4+ | ~ | ~ | ~ | 286 | 293 | ***2.4%*** |
| **NL** | DEI | 6+ | 197 | 186 | 184 | 184 | 191 | ***3.8%*** |
| **NO** | DEI | 2+ (1) | 148 | 145 | 165 | 174 | 174 | ***0.0%*** |
| **PL** | DEI | 4+ | 240 | 241 | 232 | 240 | 245 | ***2.1%*** |
| **PT** | DEI | 4+ | 210 | 210 | 215 | 209 | 210 | ***0.5%*** |
| **RO** | DEI | 4+ | 242 | 234 | 257 | 262 | 263 | ***0.4%*** |
| **RU** | DEI | 4+ | 234 | 228 | 228 | 228 | 226 | ***-0.9%*** |
| **SE** | DEI | 3+ | 154 | 157 | 160 | 165 | 166 | ***0.6%*** |
| **SI** | DEI | 4+ | 177 | 182 | 179 | 181 | 192 | ***6.1%*** |
| **SK** | DEI | 4+ | 190 | 186 | 179 | 189 | 204 | ***7.9%*** |
| **TR** | DEI | 5+ | 216 | 216 | 226 | 232 | 230 | ***-0.9%*** |

(1) Before 2008: 3+.

Source: Eurodata TV Worldwide

T.8.2

## Daily audience market share of public television 2006-2010

In %. Market shares of foreign public channels are not included.

| Country | 2006 | 2007 | 2008 | 2009 | 2010 |
|---|---|---|---|---|---|
| AT ❶ | 48.0 | 43.7 | 42.5 | 40.1 | 38.8 |
| BE (CFB) ❷ | 19.6 | 19.6 | 20.1 | 19.3 | 21.2 |
| BE (VLG) | 38.3 | 39.5 | 40.3 | 41.2 | 42.5 |
| BG | 17.1 | 15.2 | 14.2 | 12.8 | 10.3 |
| CH (Germ.) ❶ | 35.9 | 35.1 | 35.8 | 34.8 | 34.0 |
| CH (It.) | 34.6 | 33.6 | 34.7 | 33.0 | 35.0 |
| CH (Ro.) ❷ | 33.8 | 31.9 | 31.6 | 30.3 | 29.8 |
| CY | 22.4 | 19.2 | 21.2 | 21.7 | 19.7 |
| CZ ❶ | 30.8 | 31.8 | 30.6 | 28.1 | 28.3 |
| DE ❶ ❻ | 44.7 | 47.6 | 43.6 | 43.1 | 43.4 |
| DK ❶ | 72.4 | 72.4 | 68.7 | 66.5 | 62.9 |
| EE | 17.3 | 16.4 | 15.8 | 16.8 | 17.4 |
| ES ❶ ❻ | 38.7 | 37.1 | 37.1 | 36.5 | 33.8 |
| FI | 43.8 | 43.0 | 44.5 | 43.8 | 45.1 |
| FR ❸ | 38.6 | 36.9 | 35.8 | 34.4 | 33.2 |
| GB ❹ | 47.8 | 47.3 | 47.9 | 47.5 | 48.4 |
| GR | 16.6 | 16.1 | 17.1 | 16.6 | 15.0 |
| HR | 52.3 | 49.3 | 46.6 | 43.8 | 38.2 |
| HU | 18.6 | 16.6 | 15.0 | 13.6 | 13.2 |
| IE | 41.5 | 39.8 | 39.1 | 37.0 | 35.2 |
| IT ❺ | 43.6 | 41.8 | 42.3 | 40.7 | 41.3 |
| LT | 15.7 | 14.3 | 14.3 | 13.7 | 12.1 |
| LV | 16.4 | 15.3 | 15.3 | 14.6 | 13.6 |
| MK | 12.0 | ~ | ~ | 9.8 | 8.3 |
| NL ❺ | 34.9 | 33.3 | 36.8 | 35.7 | 36.5 |
| NO ❶ | 43.4 | 41.2 | 37.5 | 39.1 | 40.8 |
| PL ❶ | 49.8 | 46.6 | 44.5 | 41.6 | 39.8 |
| PT | 29.9 | 30.4 | 29.4 | 29.8 | 29.5 |
| RO | 22 | 16.3 | 7.1 | 7.1 | 7.6 |
| SE ❸ | 38.3 | 34.4 | 34.2 | 32.9 | 35.2 |
| SI ❻ | 32.4 | 31.8 | 31.3 | 29.8 | 30.9 |
| SK | 24.7 | 22.6 | 22.0 | 19.7 | 17.5 |
| TR | 5.4 | 5.0 | 3.2 | 3.1 | ~ |

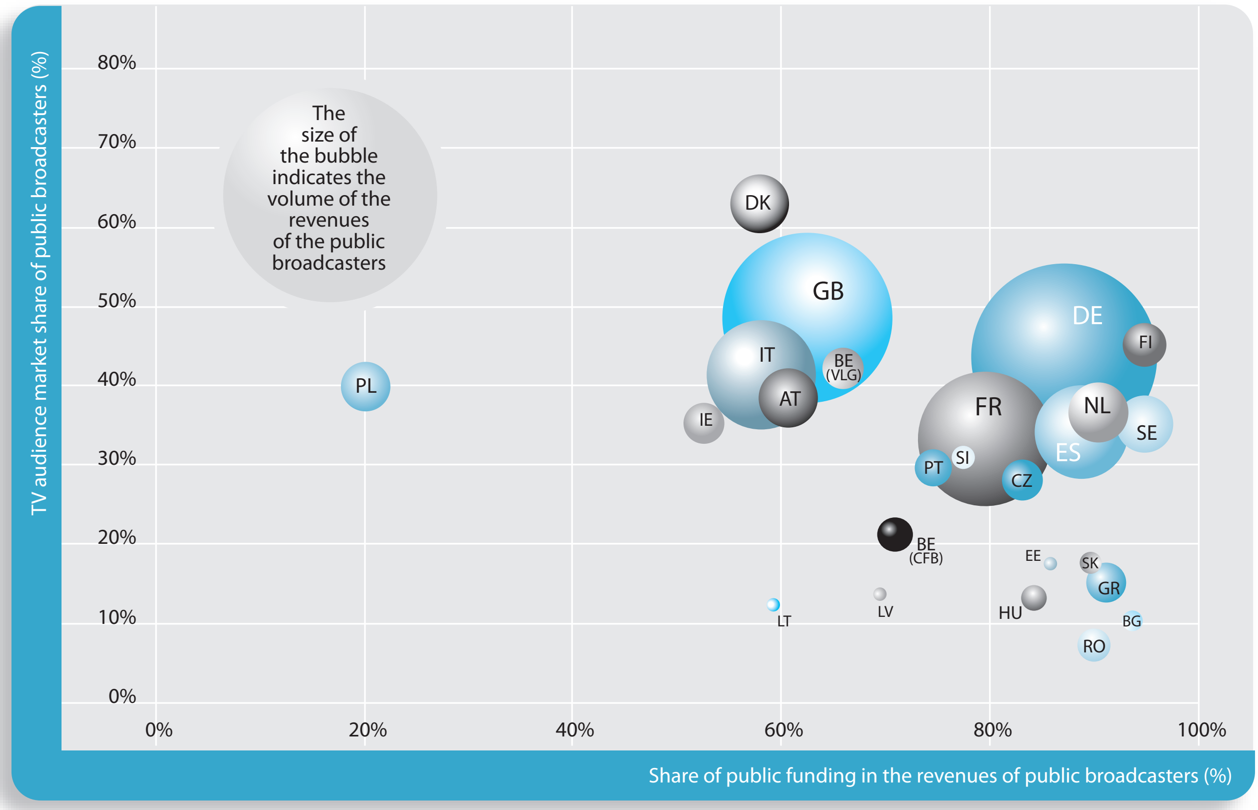
❶ Complementary thematic public channels included.
❷ TV5 Europe not included.
❸ Complementary thematic public channels not included.
❹ Includes BBC various thematic channels, UKTV channels, Channel 4 and its various thematic channels.
❺ RAI and RAISat thematic channels included since 2008.
❻ Regional public channels included.

Source: European Audiovisual Observatory on data from Eurodata-TV Worldwide and its network

T.8.3
G.8.1

## Relationship between the share of public funding of the public broadcasters and the TV audience market share 2010

| Country | Share of public funding (in %) | Daily audience market share (in %) | Total revenues of public broadcasters (EUR million) |
|---|---|---|---|
| **AT** | 59.8 | 38.8 | 971.2 |
| **BE (CFB)** | 71.1 | 21.2 | 294.6 |
| **BE (VLG)** | 66.9 | 42.5 | 452.9 |
| **BG** | 93.7 | 10.3 | 66.6 |
| **CZ** | 83.1 | 28.3 | 375.4 |
| **DE** | 87.2 | 43.4 | 8 738.3 |
| **DK** | 58.1 | 62.9 | 801.1 |
| **EE** | 85.9 | 17.4 | 28.4 |
| **ES** | 88.8 | 33.8 | 2 082.5 |
| **FI** | 94.8 | 45.1 | 420.1 |
| **FR** | 79.7 | 33.2 | 4 422.9 |
| **GB** | 62.9 | 48.4 | 7 283.6 |
| **GR** | 91.3 | 15.0 | 386.0 |
| **HU** | 84.3 | 13.2 | 170.9 |
| **IE** | 52.7 | 35.2 | 371.7 |
| **IT** | 58.3 | 41.3 | 3 039.9 |
| **LT** | 59.3 | 12.1 | 17.2 |
| **LV** | 69.6 | 13.6 | 22.4 |
| **NL** | 90.4 | 36.5 | 904.5 |
| **PL** | 20.4 | 39.8 | 518.8 |
| **PT** | 74.7 | 29.5 | 308.6 |
| **RO** | 90.1 | 7.1 | 227.7 |
| **SE** | 94.8 | 35.2 | 772.4 |
| **SI** | 77.4 | 30.9 | 123.0 |
| **SK** | 89.7 | 17.5 | 101.0 |




Source: European Audiovisual Observatory

T.8.4

## Number of online videos viewed per viewer in selected countries
## 2010-2011 Visitors age 15+. Home/work location.

| Country | Hours per viewer 04.2011 | Total unique viewers (in million) 10.2010 | 04.2011 | Videos per viewer 10.2010 | 04.2011 | 10.2011 |
|---|---|---|---|---|---|---|
| DE | 19.6 | 40.2 | 44.9 | 194.8 | 186.9 | 250.6 |
| ES | 18.4 | 19.2 | 18.9 | 151.5 | 150.9 | 178.6 |
| FR | 12.8 | 39.4 | 38.7 | 139.2 | 131.2 | 190.1 |
| GB | 17.0 | 35.0 | 32.6 | 172.5 | 166.4 | 268.6 |
| IT | 12.8 | ~ | 18.7 | ~ | 114.8 | ~ |
| RU | 9.7 | ~ | 39.8 | ~ | 86.8 | ~ |
| TR | 18.7 | ~ | 20.7 | ~ | 168.6 | 250.7 |

Source: comScore Video Metrix

T.8.5

## Top 3 video properties by total videos viewed in selected European countries
## October 2011 Total audience. Visitors age 15+. Home/work location.

| Country | Videos (million) | Share of videos | Minutes per viewer |
|---|---|---|---|
| **DE** | | | |
| Google Sites | 5 391 | 49.2% | 496.7 |
| RTL Group Sites | 118 | 1.1% | 22.9 |
| FutureTV | 117 | 1.1% | 42.1 |
| **ES** | | | |
| Google Sites | 1 548 | 45.6% | 269.4 |
| VEVO | 114 | 3.4% | 56.9 |
| Antena 3 Television | 51 | 1.5% | 107.2 |
| **FR** | | | |
| Google Sites | 2 781 | 39.6% | 273.7 |
| Dailymotion.com | 187 | 2.7% | 82.2 |
| VEVO | 142 | 2.0% | 50.3 |
| **GB** | | | |
| Google Sites | 370 | 43.8% | 494.9 |
| VEVO | 194 | 2.3% | 68.9 |
| BBC Sites | 113 | 1.3% | 98.0 |
| **IT** | | | |
| Google Sites | 1 689 | 55.9% | 273.2 |
| VEVO | 128 | 4.2% | 61.2 |
| Perform Sports | 52 | 1.7% | 78.5 |
| **RU** | | | |
| Google Sites | 2 300 | 41.8% | 233.8 |
| Mail.ru Group | 260 | 4.7% | 65.8 |
| Gazprom Media | 196 | 3.6% | 67.4 |
| **TR** | | | |
| Google Sites | 1 865 | 34.2% | 352.9 |
| Facebook.com | 797 | 14.6% | 275.7 |
| Turk Telekom Group | 199 | 3.7% | 222.6 |

Source: comScore Video Metrix

2 3 4 5 6 7 8 9

T.8.6

## Top online video content properties ranked by total unique viewers
### April 2011-January 2012
In million. Home and work location.

| DE - April 2011 | Total unique viewers | Number of videos | Minute per video |
|---|---|---|---|
| ***Total Internet Audience*** | ***44.9*** | ***8 395.7*** | – |
| Google Sites | 36.5 | 3 809.0 | 317.6 |
| ProSiebenSat1 Sites | 10.2 | 106.2 | 36.8 |
| Facebook.com | 8.8 | 99.6 | 21 |
| RTL Group Sites | 8.2 | 88.6 | 45.6 |
| Viacom Digital | 8.2 | 45.0 | 19.7 |
| Vevo | 7.7 | 22.7 | 2.5 |
| United-Internet Sites | 6.4 | 32.5 | 17.2 |
| Microsoft Sites | 5.6 | 60.7 | 15.5 |
| Dailymotion.com | 4.6 | 34.9 | 52.1 |
| Zaoza.de | 4.3 | ~ | |
| SAY Media Sites | ~ | 36.1 | 197.7 |

| FR - January 2012 | Total unique viewers | Video per viewer (in units) | Minute per video |
|---|---|---|---|
| ***Total Internet Audience*** | ***39.6*** | ***156.8*** | ***6.6*** |
| Google Sites | 34.6 | 70.7 | 3.6 |
| Dailymotion.com | 18.7 | 14.3 | 7.4 |
| VEVO | 12.4 | 10.7 | 4.2 |
| Groupe TF1 | 9.0 | 9.1 | 10.9 |
| Facebook.com | 7.6 | 5.1 | 3.1 |
| Vivendi | 6.9 | 8 | 1.7 |
| Viacom Digital | 6.6 | 5.1 | 4.4 |
| Joost Media | 6.3 | 3.5 | 0.6 |
| Microsoft Sites | 5.6 | 7.2 | 2.5 |
| Orange Sites | 5.4 | 8.5 | 1.8 |

| GB - January 2012 | Total unique viewers | Video per viewer (in units) | Viewed videos |
|---|---|---|---|
| ***Total Online Content Video Audience: Age 6+*** | ***33.3*** | ***239.8*** | ***8 004.1*** |
| Google Sites | 29.9 | 122.5 | 3 660.2 |
| VEVO | 11.7 | 15.2 | 177.0 |
| Facebook.com | 8.3 | 5.4 | 45.0 |
| BBC Sites | 7.5 | 10.2 | 76.0 |
| Viacom Digital | 7.2 | 6.1 | 43.6 |
| Amazon Sites | 5.9 | 3.0 | 18.2 |
| Perform Sports | 5.5 | 19.5 | 107.2 |
| Yahoo! Sites | 4.7 | 7.4 | 34.4 |
| Microsoft Sites | 4.1 | 9.0 | 36.7 |
| Vimeo | 3.9 | 3.9 | 15.0 |

| RU - May 2011 | Total unique viewers | Viewed videos |
|---|---|---|
| ***Total Internet : Total Audience*** | ***41.1*** | ***3 972.6*** |
| Google Sites | 30.6 | 1 534.0 |
| Mail.ru Group | 18.4 | 165.1 |
| Gazprom Media | 12.3 | 177.9 |
| Yandex Sites | 6.5 | 35.3 |
| RosBusinessConsulting | 4.7 | 29.6 |
| Vimeo.com | 4.7 | 14.7 |
| Vevo | 3.2 | 11.8 |
| digitalaccess.ru | 2.6 | 23.1 |
| 24video.net | 2.4 | 35.1 |
| Channel One Russia | 2.4 | 19.8 |

Source: comScore Video Metrix

Chapter
Chapitre
*Kapitel*
9

# Programme production and sales companies

# Entreprises de production et de ventes de programmes

# *Produktions- und Lizenz-gesellschaften*

2 3 4 5 6 7 8 9

T.9.1

## Leading TV production groups in Europe 2006-2010

Operating revenues in EUR million.

| Rank | Company | Country | Ownership | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|---|---|
| 1 | **RTL Group / FremantleMedia** [1] | **DE** | **RTL Group** | **1 128** | **1 132** | **1 203** | **1 183** | **1 272** | ***7.5%*** |
| | - Fremantlemedia Ltd | **GB** | | 349 | 317 | 290 | 306 | 341 | ***11.4%*** |
| | - UFA Film und TV Produktion GmbH | **DE** | | 305 | 306 | 301 | ~ | ~ | ~ |
| | - UFA Film und Fernseh GmbH | **DE** | | 13 | 82 | ~ | ~ | ~ | ~ |
| | - C Productions | **FR** | | 24 | 25 | 54 | 57 | 61 | ***7.7%*** |
| | - FremantleMedia Italia | **IT** | | 57 | 59 | 58 | 35 | 33 | ***-6.0%*** |
| | - Fremantle Media Group Ltd | **GB** | | 17 | 18 | 14 | 11 | 32 | ***190.0%*** |
| | - Grundy Light Entertainment | **DE** | | 23 | 29 | 28 | ~ | ~ | ~ |
| | - Grundy Producciones S.A. | **ES** | | 12 | 20 | ~ | ~ | ~ | ~ |
| | - Fremantle Portugal | **PT** | | 9 | 12 | 15 | 15 | ~ | ~ |
| | - Fremantlemedia Finland | **FI** | | 3 | 12 | 15 | 14 | 14 | ***-2.1%*** |
| | - Blu A/S | **DK** | | 12 | 16 | 15 | 12 | ~ | ~ |
| | - Fremantlemedia Sverige | **SE** | | ~ | 5 | 5 | 5 | 8 | ***66.0%*** |
| | - Fremantlemedia Belgium | **BE** | | 8 | 10 | 7 | 5 | 6 | ***11.3%*** |
| 2 | **EDAM Acquisition Holding Cooperative** [1] | **NL** | **Mediaset/Cyrte** [2] | **–** | **613** | **1 301** | **1 189** | **1 246** | ***4.8%*** |
| | Endemol Investment Holding N.V. | **NL** | | 1 287 | – | – | – | – | – |
| | Endemol Group B.V. | **NL** | | 1 117 | – | – | – | – | – |
| | Endemol UK PLC (cons.) | **GB** | | 259 | 216 | 178 | 177 | ~ | ~ |
| | Endemol UK Ltd (uncons.) | **GB** | | ~ | ~ | ~ | ~ | 97 | ~ |
| | Endemol Italia S.p.A. | **IT** | | 128 | 94 | 86 | 117 | 86 | ***-26.7%*** |
| | Brighter Pictures | **GB** | | 80 | 90 | 75 | 81 | 83 | ***2.0%*** |
| | Endemol Deutschland | **DE** | | 64 | 63 | 67 | 54 | ~ | ~ |
| | Zeppelin Television | **ES** | | 39 | ~ | 61 | 57 | ~ | ~ |
| | Tiger Aspects Production | **GB** | | 61 | 111 | 52 | 50 | 48 | ***-5.0%*** |
| | Diagonal Televisio | **ES** | | 17 | 26 | 40 | 40 | 27 | ***-32.6%*** |
| | Gestmusic Endemol | **ES** | | 74 | 79 | 68 | 41 | 22 | ***-47.3%*** |
| | Endemol Portugal | **PT** | | 16 | 14 | 14 | 13 | 15 | ***18.5%*** |
| | Endemol Belgie | **BE** | | 22 | 17 | 13 | 10 | ~ | ~ |
| | Endemol Moskow | **RU** | | ~ | 13 | 13 | 7 | ~ | ~ |
| | Endemol Polska | **PL** | | 3 | 4 | 11 | 4 | ~ | ~ |
| | Endemol France | **FR** | | ~ | ~ | ~ | ~ | ~ | ~ |
| 3 | **Imagina Media Audiovisual S.L.** [1] [3] | **ES** | | **289** | **787** | **1 052** | **~** | **~** | ***~*** |
| | Mediaproduccion S.L. | **ES** | | 204 | 367 | ~ | 580 | ~ | ~ |
| | Globo Media S.A. | **ES** | | 106 | 119 | 112 | ~ | ~ | ~ |
| | K 2000 | **ES** | | 7 | 10 | 12 | 10 | ~ | ~ |
| | Grupo Globo Media S.A. | **ES** | | 9 | ~ | 7 | ~ | ~ | ~ |
| 4 | **Shine Ltd** [4] | **GB** | **News Corp.** | **34** | **125** | **250** | **290** | **472** | ***62.6%*** |
| | Princess Productuions | **GB** | | 20 | 23 | 20 | 15 | 29 | ***95.3%*** |
| | Kudos Film & Television | **GB** | | ~ | 14 | 13 | 13 | 14 | ***7.1%*** |
| | Dragonfly Film and Television Productions | **GB** | | 3 | 14 | 11 | 8 | 11 | ***37.5%*** |
| | Metronome Film and Television Oy | **FI** | | 7 | 10 | 9 | 10 | 9 | ***-9.5%*** |
| | Brown Eyed Boy Ltd | **GB** | | 1 | 3 | 2 | 2 | 2 | ***5.0%*** |
| 5 | **All3Media Holdings Limited** | **GB** | | **–** | **339** | **460** | **419** | **452** | ***7.8%*** |
| | All 3 Media Group [5] | **GB** | | 308 | – | – | – | – | – |
| | MME Moviement AG (67 %) | **DE** | | 96 | 57 | 88 | 84 | 79 | ***-6.5%*** |
| | Lime Pictures Ltd | **GB** | | 48 | 48 | 45 | 52 | 48 | ***-8.7%*** |
| | Bentley Productions Ltd | **GB** | | 27 | 33 | 30 | 25 | 28 | ***10.3%*** |
| | North One Television Ltd | **GB** | | 55 | 44 | 42 | 29 | 25 | ***-14.5%*** |
| | Objective Productions Ltd [5] | **GB** | | 32 | ~ | 27 | 23 | 20 | ***-13.0%*** |
| | Maverick Television | **GB** | | ~ | 12 | 14 | 15 | 20 | ***30.0%*** |
| | Company Television | **GB** | | 7 | 13 | 23 | 25 | 18 | ***-30.0%*** |
| | Cactus TV | **GB** | | 28 | 17 | 12 | 15 | 6 | ***-59.3%*** |
| | Lion Television | **GB** | | 29 | 39 | 20 | 13 | 14 | ***6.9%*** |

T.9.1

## Leading TV production groups in Europe (Continued)

### 2006-2010 Operating revenues in EUR million.

| Rank | Company | Country | Ownership | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|---|
| 6 | **Highlight Communications AG** [1] | **CH** | | **326** | **293** | **353** | **436** | **440** | ***0.9%*** |
| 7 | **Zodiak Media Group** *est.* | **IT** | **De Agostini** | **78** | **346** | **345** | **370** | **430** | ***16.4%*** |
| | Zodiak Media Ltd (former RDF) | **GB** | | ~ | ~ | 146 | 141 | ~ | ~ |
| | Zodiak Television AB | **SE** | | 63 | 112 | ~ | ~ | ~ | ~ |
| | Zodiak Media (Central) Ltd | **GB** | | 76 | 71 | 67 | 66 | 37 | ***-43.8%*** |
| | KM Management | **FR** | | ~ | ~ | 13 | 44 | 64 | ***44.0%*** |
| | Magnolia S.P.A. | **IT** | | 45 | 48 | 54 | 41 | 43 | ***5.6%*** |
| | Zodiak Active SRL | **IT** | | 8 | 17 | 22 | 24 | 27 | ***11.1%*** |
| | Marathon Media | **FR** | | 26 | 22 | 28 | 30 | 26 | ***-15.0%*** |
| | Kanakna Productions | **BE** | | 18 | 19 | 17 | 21 | 22 | ***0.9%*** |
| | Magnolia TV Espana | **ES** | | 10 | 16 | 19 | 21 | ~ | ~ |
| | Magnolia Fiction | **IT** | | ~ | 5 | 14 | 6 | 21 | ***254.2%*** |
| | Zodiak Media Central France | **FR** | | 9 | 12 | 21 | 19 | 14 | ***-27.3%*** |
| | Jarowskij Enterprises AB | **SE** | | 11 | 12 | 10 | 11 | 10 | ***-7.3%*** |
| 8 | **ITV Studios Ltd** | **GB** | **ITV PLC** | ~ | **386** | **436** | **411** | **405** | ***-1.4%*** |
| 9 | **Eyeworks Holding B.V.** | **NL** | | **141** | **227** | **228** | **202** | **217** | ***7.4%*** |
| | Eyeworks Dynamo AS | **NO** | | ~ | 8 | 6 | 6 | 11 | ***76.7%*** |
| | Eyeworks Italia S.R.L. | **IT** | | | | | 2 | 8 | ***368.8%*** |
| 10 | **Groupe TF1** *est.* [6] | | **Groupe Bouygues** | **85** | **129** | **83** | **172** | **148** | ***-14.1%*** |
| | TF1 Production (formerly GLEM) | **FR** | | 43 | 35 | 32 | 172 | 148 | ***-14.1%*** |
| | Alma Productions | **FR** | | 35 | 71 | ~ | – | – | – |
| | Quai Sud Télévision | **FR** | | 22 | 22 | ~ | – | – | – |
| | Tout Audiovisuel Production | **FR** | | 17 | 21 | ~ | – | – | – |
| | Yagan Productions | **FR** | | 11 | 10 | ~ | – | – | – |

[1] Includes rights trade.

[2] In May 2007, Mediacinco Cartera SL (Mediaset Group), Cyrte Fund II B.V. and GS Capital Partners VI, L.P., entered in a definitive agreement with Telefonica for the purchase of 99.7% of Endemol Investment Holding BV, company that owns 75% of the listing company Endemol NV. Mediaset also owns the production company Mediavivere. In November 2007, Mediaset also announced the merger between its subsidiary Medusa Film and the TV fiction production company Taodue S.R.L.

[3] Imagina Media Audiovisual S.L. was born in July 2006 out of the merger of the Grupo Arbol with the group Mediapro.

[4] The Shine Group was founded in 2001 by Elisabeth Murdoch, daughter of Rupert Murdoch. It includes 24 companies in 10 countries and claims to have a 400 million USD turnover in 2010. Rupert Murdoch announced in February 2011 that his group News Corp was buying the Shine Group for GBP 415 million (USD 673 million), including debt.

[5] The group De Agostini took over the French group Marathon in July 2007 and the Swedish group Zodiak Television AB in July 2008 in July 2008. It announced in November 2008 the creation of the French umbrella company Zodiak Entertainment SAS. In 2010, Zodiak Entertainment and the RDF Media group merged under the name of Zodiak Media Group.

[6] All production companies of the TF1 Group were merged in TF1 Production in 2010.

Source: European Audiovisual Observatory

T.9.2

## The 40 leading TV production companies in Europe 2006-2010

Operating revenues in EUR million.

| Rank | Company | Country | Ownership | Genre |
|---|---|---|---|---|
| 1 | Mediaproduccion ❶ | ES | Imagina Media Audiovisual | Fiction, feature films, sports, news |
| 2 | Shine Ltd | GB | News Corp. | Fiction, entertainment, features |
| 3 | All3Media Holdings Ltd ❷ | GB | | Fiction, entertainment |
| *p.m.* | All3Media Group Ltd ❷ | GB | | Fiction |
| *p.m.* | Lime Pictures Ltd | GB | All3Media | Fiction |
| 4 | ITV Studios Ltd | GB | ITV PLC | Fiction |
| 5 | Fremantlemedia Ltd | GB | RTL Group | Entertainment, fiction, factual |
| 6 | UFA Film & TV Produktion GmbH | DE | RTL Group | Entertainment, fiction |
| 7 | Eyeworks Holding B.V. | NL | | Formats, fiction, entertainment, documentary |
| 8 | Endemol UK PLC | GB | Mediaset/Cyrte | Entertainment, fiction, documentary |
| *p.m.* | Brighter Pictures Ltd | GB | Endemol/Mediaset-Cyrte | Entertainment |
| 9 | Telfrance (cons.) | FR | | Fiction, entertainment |
| *p.m.* | Telfrance Série | FR | Telfrance | Fiction |
| 10 | TF1 Production ❸ | FR | TF1 | Entertainment, fiction |
| *p.m.* | Alma Productions ❸ | FR | TF1 | Fiction |
| 11 | Zodiak Media Ltd | GB | De Agostini | Entertainment, sitcoms and drama series |
| *p.m.* | Zodiak Media AB (cons.) ❹ | SE | De Agostini | Entertainment, sitcoms and drama series |
| *p.m.* | Zodiak Media (Central) Ltd | GB | De Agostini | Fiction, entertainment, documentaries |
| 12 | Endemol Italia S.P.A. | IT | Mediaset/Cyrte | Entertainment, fiction |
| 13 | Independent Television News Ltd | GB | ITV | News |
| 14 | Shed Media PLC ❺ | GB | | Fiction |
| 15 | Associated Press Television News Ltd | GB | AP | News |
| 16 | MME Moviement AG (cons.) ❻ | DE | All3Media | Fiction, documentary, entertainment |
| 17 | Tinopolis Ltd ❼ | GB | Vitruvian Partners | Animation, fiction |
| *p.m.* | Tinopolis PLC ❼ | GB | | Animation |
| 18 | Plazamedia GmbH *est.* | DE | em.TV | Sports |
| 19 | Studio 100 | BE | Fortis | Animation |
| 20 | Constantin Entertainment GmbH *est.* | DE | Constantin AG | Shows, comedy |
| 21 | Taodue S.R.L. | IT | Mediaset | Fiction |
| 22 | C Productions | FR | Métropole TV (RTL Group) | News |
| 23 | DCD Medias ❽ | GB | Henderson Group PLC | Fiction, documentary, entertainment |
| 24 | Boomerang TV (cons.) | ES | | Entertainment, fiction |
| 25 | Network Movie Film- und Fernsehproduktion | DE | ZDF | Fiction |
| 26 | Endemol Deutschland | DE | Mediaset/Cyrte | Entertainment |
| 27 | Ziegler Film GmbH | DE | | Fiction, feature films |
| 28 | Agencia de Television Latinoamericana de Servicios y Noticias Espana S.A. ❾ | ES | | News |
| 29 | Fremantlemedia Espana | ES | RTL Group / Fremantlemedia | Fiction |
| 30 | Tiger Aspect Productions Ltd | GB | IMG International Media Group | Fiction, films, entertainment, documentary, music & arts |
| 31 | Brainpool TV GmbH | DE | Banijay | Fiction |
| 32 | Publispei | IT | | Fiction, entertianment |
| 33 | Adventure Line Productions | FR | | Entertainment |
| 34 | KM | FR | | Documentaries |
| 35 | Magnolia S.P.A. | IT | De Agostini | Fiction |
| 36 | Multimedia France Production | FR | France Televisions | Fiction |
| 37 | Plural Entertainment Espana | ES | Media Capital | Fiction |
| 38 | Luxvide S.P.A. | IT | | Fiction |
| 39 | Diagonal Televisio S.A. | ES | Endemol/Mediaset-Cyrte | Fiction |
| 40 | Hat Trick Holdings Ltd | GB | | Animation |

❶ In June 2010, faced with a possibility of cash-flow imbalance Mediaproduccion S.L. requested judicial protection through a voluntary insolvency proceeding.

❷ ALL3MEDIA is a company created in 2003 through a GBP 45 million management buy-in of the former Chrysalis TV Group. The companies within the Group are Assembly TV, Bentley Productions, Cactus TV, Lion Television, Mersey Television (since June 2005), North One Television in the UK, IdtV in the Netherlands, South Pacific Pictures in New Zealand and Lion Television in the USA.

❸ In 2009, all TV production companies of the TF1 Group were merged in TF1 Production (former GLEM).

❹ Acquired by the group De Agostini in July 2008.

| Main programmes | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|
| *España Direto, Vidas Anonimas, Rico al instante,…* | 204.0 | 367.0 | ~ | 579.6 | ~ | ~ |
| *Demons, Merlin, …* | 34.2 | 125.2 | 250.0 | 289.9 | 471.5 | 62.6% |
| | – | 338.7 | 459.5 | 418.7 | 451.7 | 7.9% |
| *Richard & Judy, Midsomer Murders* | 308.2 | – | – | – | – | – |
| *Living on the Edge* | 48.1 | 47.5 | 44.9 | 52.0 | 47.5 | -8.7% |
| *Coronation Street, Emerdale,…* | ~ | 525.6 | 435.7 | 410.7 | 405.1 | -1.4% |
| *Idols, Pokerface, The X Factor,…* | 349.5 | 317.2 | 289.8 | 306.5 | 341.3 | 11.4% |
| | 304.7 | 306.1 | 301.2 | ~ | ~ | ~ |
| | 141.1 | 227.4 | 227.6 | 201.9 | 216.8 | 7.4% |
| *Deal or No Deal, Cell,…* | 258.9 | 216.0 | 178.1 | 176.7 | ~ | ~ |
| *Big Brother (since 2006)* | 79.5 | 89.6 | 75.0 | 80.7 | 82.6 | 2.4% |
| *Plus belle la vie* | 188.2 | 157.1 | ~ | ~ | ~ | ~ |
| | 47.8 | 50.6 | 49.2 | 60.3 | ~ | ~ |
| | 43.5 | 35.0 | 32.4 | 171.7 | 147.7 | -14.0% |
| *Paris enquêtes criminelles* | 35.2 | 70.5 | ~ | – | – | – |
| | – | – | – | 145.7 | 141.5 | -2.9% |
| | 63.0 | 111.9 | ~ | – | – | – |
| *Wife Swap, Scrapheap Challenge, Holiday Showdown* | 76.4 | 70.8 | 67.2 | 65.6 | ~ | ~ |
| | 127.9 | 93.8 | 86.0 | 116.6 | 85.8 | -26.4% |
| *ITV News, Channel 4 News, Five News* | 147.3 | 131.6 | 110.5 | 110.7 | 112.8 | 1.9% |
| *Bad Girls, Footballers' Wifes* | 64.6 | 85.9 | 85.8 | 104.1 | ~ | ~ |
| | 83.1 | 80.7 | 93.5 | 87.0 | ~ | ~ |
| *Die Sitte, Typisch Sophie* | 95.8 | 57.8 | 88.5 | 83.8 | 78.5 | -6.3% |
| | – | – | ~ | 72.4 | 83.2 | 14.9% |
| *Hot Rod Dogs, JGT* | 71.2 | 94.5 | – | – | – | – |
| | 75.0 | 75.0 | 75.0 | 75.0 | 75.0 | – |
| | 50.1 | 50.9 | 70.1 | 66.2 | 74.9 | 13.1% |
| *Darf man das ?, Extreme Activity,...* | 83.3 | 70.0 | 70.0 | 70.0 | 70.0 | – |
| | 53.5 | 109.7 | ~ | 93.2 | 68 | -27.0% |
| | 24.2 | 25.3 | 54.1 | 56.9 | 61.3 | 7.7% |
| | 19.2 | 39.8 | 43.0 | 40.4 | 56.7 | – |
| | 45.9 | 44.2 | 55.0 | ~ | ~ | ~ |
| *Der Kommissar und das Meer* | 41.3 | 43.1 | 48.0 | 54.5 | ~ | ~ |
| | 63.7 | 62.7 | 67.5 | 54.3 | ~ | ~ |
| | 29.1 | 25.4 | 49.6 | ~ | ~ | ~ |
| | 60.8 | 60.3 | 52.2 | 49.5 | ~ | ~ |
| | 11.7 | 20.2 | 49.0 | ~ | ~ | ~ |
| *The Vicar of Dibley ; Gimme Gimme Gimme; Playing The Field* | 68.0 | 110.8 | 52.3 | 50.1 | 47.6 | -5.0% |
| | – | 47.9 | 48.2 | 47.0 | ~ | ~ |
| | 29.7 | 28.2 | 44.2 | 44.6 | ~ | ~ |
| | 36.6 | 38.6 | 44.4 | ~ | ~ | ~ |
| | – | – | 12.5 | 44.3 | ~ | ~ |
| | 45.5 | 48.0 | 53.9 | 41.0 | 43.3 | 5.6% |
| | 22.5 | 28.6 | 33.1 | 34.5 | 41.1 | 19.1% |
| | 12.5 | 28.9 | 36.4 | 41.1 | ~ | ~ |
| | 77.0 | 41.9 | 39.3 | 39.5 | 40.9 | 3.5% |
| | 17.2 | 26.4 | 39.8 | 39.9 | ~ | ~ |
| | 33.6 | 36.0 | 26.8 | 22.9 | 39.2 | 71.2% |

Source: European Audiovisual Observatory

5 2007 over 16 months.
6 2007 over 8 months.
7 Tinopolis PLC was acquired by Vitruvian partners in 2008 and delisted.
8 2010 over 18 months.
9 Dissolved in July 2011.

T.9.3

# The 40 leading fiction TV production companies in Europe
## 2006-2010 Operating revenues in EUR million.

| Rank | Company | Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| 1 | Mediaproduccion [1] | ES | 204.0 | 367.0 | ~ | 579.6 | ~ | ~ |
| 2 | Shine Ltd | GB | 34.2 | 125.2 | 250.0 | 289.9 | 471.5 | 62.6% |
| 3 | All3Media Holdings Ltd [2] | GB | – | 338.7 | 459.5 | 418.7 | 451.7 | 7.9% |
| p.m. | All3Media Group Ltd [2] | GB | 308.2 | – | – | – | – | – |
| p.m. | Lime Pictures Ltd | GB | 48.1 | 47.5 | 44.9 | 52.0 | 47.5 | -8.7% |
| p.m. | North One Television Ltd | GB | 56.1 | 43.8 | 42.1 | 29.3 | 24.8 | -15.4% |
| 4 | ITV Studios Ltd | GB | ~ | 525.6 | 435.7 | 410.7 | 405.1 | -1.4% |
| 5 | Fremantlemedia Ltd | GB | 349.5 | 317.2 | 289.8 | 306.5 | 341.3 | 11.4% |
| 6 | UFA Film & TV Produktion GmbH | DE | 304.7 | 306.1 | 301.2 | ~ | ~ | ~ |
| 7 | Eyeworks Holding B.V. | NL | 141.1 | 227.4 | 227.6 | 201.9 | 216.8 | 7.4% |
| 8 | TF1 Production [3] | FR | 43.5 | 35.0 | 32.4 | 171.7 | 147.7 | -14.0% |
| p.m. | Alma Productions [3] | FR | 35.2 | 70.5 | ~ | – | – | – |
| 9 | Globomedia | FR | 105.7 | 118.8 | 111.8 | ~ | ~ | ~ |
| 10 | Shed Media PLC [4] | GB | 64.6 | 85.9 | 85.8 | 104.1 | ~ | ~ |
| 11 | Endemol UK Ltd. | GB | ~ | ~ | ~ | ~ | 97.4 | ~ |
| 12 | Endemol Italia S.P.A. | IT | 127.9 | 93.8 | 86.0 | 116.6 | 85.8 | -26.4% |
| 13 | Tinopolis Ltd [5] | GB | – | – | ~ | 72.4 | 83.2 | 14.9% |
| 14 | Brighter Pictures Ltd | GB | 79.5 | 89.6 | 75.0 | 80.7 | 82.6 | 2.4% |
| 15 | MME Moviement AG [6] | DE | 95.8 | 57.8 | 88.5 | 83.8 | 78.5 | -6.3% |
| 16 | Constantin Entertainment GmbH *est.* | DE | 70.0 | 70.0 | 70.0 | 70.0 | 70.0 | – |
| 17 | Taodue S.R.L. | IT | 53.5 | 109.7 | ~ | 93.2 | 68 | -27.0% |
| 18 | Telfrance Série | FR | 47.8 | 50.6 | 49.2 | 60.3 | ~ | ~ |
| 19 | Zodiak Media (Central) Ltd | GB | 76.4 | 70.8 | 67.2 | 65.6 | ~ | ~ |
| 20 | DCD Media [7] | GB | 19.2 | 39.8 | 43.0 | 40.4 | 56.7 | – |
| 21 | Zeppelin | ES | 38.9 | ~ | 60.7 | 56.5 | ~ | ~ |
| 22 | Network Movie Film- und Fernsehproduktion | DE | 41.3 | 43.1 | 48.0 | 54.5 | ~ | ~ |
| 23 | Endemol Deutschland | DE | 63.7 | 62.7 | 67.5 | 54.3 | ~ | ~ |
| 24 | Ziegler Film GmbH | DE | 29.1 | 25.4 | 49.6 | ~ | ~ | ~ |
| 25 | Fremantlemedia Espana | ES | 11.7 | 20.2 | 49.0 | ~ | ~ | ~ |
| 26 | Brainpool TV GmbH | DE | – | 47.9 | 48.2 | ~ | ~ | ~ |
| 27 | Tiger Aspect Productions Ltd | GB | 68.0 | 110.8 | 52.3 | 50.1 | 47.6 | -5.0% |
| 28 | JLA Productions | FR | 38.9 | 40.0 | 38.6 | 39.8 | 44.9 | 12.8% |
| 29 | Publispei | IT | 29.7 | 28.2 | 44.2 | 44.6 | ~ | ~ |
| 30 | Magnolia S.P.A. | IT | 45.5 | 48.0 | 53.9 | 41.0 | 43.3 | 5.6% |
| 31 | DEMD Productions | FR | 42.1 | 43.2 | 34.8 | 40.1 | 41.8 | 4.2% |
| 32 | Multimedia France Production | FR | 22.5 | 28.6 | 33.1 | 34.5 | 41.5 | 20.3% |
| 33 | Plural Entertainment Espana S.L. | ES | 12.5 | 23.9 | 36.4 | 41.1 | ~ | ~ |
| 34 | Luxvide S.P.A. | IT | 77.0 | 41.9 | 39.3 | 39.5 | 40.9 | 3.5% |
| 35 | Hat Trick Holdings Ltd | GB | 34 | 36 | 27 | 22.9 | 39.2 | 71.2% |
| 36 | Neue Deutsche Filmgesellschaft *est.* | DE | 33.6 | 38.6 | ~ | ~ | ~ | ~ |
| 37 | Plural Entertainment Portugal S.A. | PT | ~ | 18.6 | 20.6 | 45.8 | 38.1 | -16.8% |
| 38 | Strix Television AB | SE | 44.9 | 34.7 | 22.4 | 36.8 | 37.9 | 3.0% |
| 39 | Saxonia Media Filmproduktion GmbH | DE | 32.7 | 34.5 | 32.0 | 35.0 | 34.9 | -0.3% |
| 40 | Métropole Productions | FR | 34.5 | 37.1 | 38.6 | 40.9 | 34.4 | -15.9% |

[1] In June 2010, faced with a possibility of cash-flow imbalance Mediaproduccion S.L. has requested judicial protection through a voluntary insolvency proceeding.

[2] ALL3MEDIA is a company created in 2003 through a GBP 45 million management buy-in of the former Chrysalis TV Group. The companies within the Group are Assembly TV, Bentley Productions, Cactus TV, Lion Television, Mersey Television (since June 2005), North One Television in the UK, IdtV in the Netherlands, South Pacific Pictures in New Zealand and Lion Television in the USA.

[3] In 2009, all TV production companies of the TF1 Group were merged in TF1 Production (former GLEM).

[4] 2007 over 16 months.

[5] Tinopolis PLC was acquired by Vitruvian partners in 2008 and delisted.

[6] 2007 over 8 months.

[7] 2010 over 18 months.

Source: European Audiovisual Observatory

T.9.4

# The 30 leading animation production and distribution companies in the European Union

## 2006-2010

Operating revenues in EUR million. Non-European owned companies are not included.

| Rank | Company | Country | 2006 | 2007 | 2008 | 2009 | 2010 | *2010/09* |
|---|---|---|---|---|---|---|---|---|
| 1 | Studio 100 | **BE** | 50.1 | 50.9 | 70.1 | 66.2 | 74.9 | ***13.1%*** |
| 2 | Aardman Holdings Ltd (cons.) | **GB** | 37.2 | 21.5 | 20.9 | 38.2 | 65.8 | ***72.3%*** |
| 3 | Rainbow S.P.A. (cons.) | **IT** | 23.3 | 36.9 | 52.0 | 50.3 | 61 | ***21.3%*** |
| 4 | Alphanim | **FR** | 27.0 | 38.1 | 28.7 | 29.5 | 29 | ***-1.7%*** |
| *5* | Moonscoop | **FR** | 22.4 | 22.7 | 25.6 | 26.3 | ~ | ***~*** |
| *6* | Marathon Media | **FR** | 26.0 | 21.9 | 27.7 | 30.2 | 25.5 | ***-15.6%*** |
| 7 | Hit Entertainment Ltd | **GB** | 29.9 | 34.3 | 32.5 | 25.4 | 22.4 | ***-11.8%*** |
| *p.m.* | Gullane (Thomas) Ltd | **GB** | 23.5 | 28.9 | 28.4 | 36.4 | 34.9 | ***-4.1%*** |
| *p.m.* | Gullane (Productions) Ltd | **GB** | ~ | 0.0 | 7.0 | 4.7 | 7.5 | ***59.6%*** |
| 8 | Millimages (cons.) | **FR** | 32.8 | 39.7 | 32.5 | 22.3 | 15.6 | ***-30.0%*** |
| 9 | Method Animation | **FR** | ~ | ~ | 16.2 | 20.6 | 15.5 | ***-24.8%*** |
| 10 | Tele Images Productions | **FR** | 10.9 | 10.6 | 9.1 | 17.3 | 12.3 | ***-28.9%*** |
| 11 | Dargaud Media | **FR** | 10.8 | 7.1 | 7.8 | 10.5 | 11.2 | ***6.7%*** |
| 12 | Mondo TV (cons.) | **IT** | 35.0 | 44.7 | 38.0 | 10.3 | 9.4 | ***-8.7%*** |
| 13 | Kaze SAS | **FR** | 7.4 | 9.9 | 14.5 | 8.4 | 9.3 | ***10.7%*** |
| 14 | Xilam Animation (cons.) [1] | **FR** | 10.2 | 14.4 | 12.0 | 11 | 9.1 | ***-17.3%*** |
| 15 | Les Armateurs | **FR** | 8.5 | 5.0 | 8.7 | ~ | ~ | ***~*** |
| 16 | Woodland Animations Ltd | **GB** | 8.1 | 3.6 | 3.5 | 2.3 | 7.3 | ***217.4%*** |
| 17 | Blue Spirit Animation | **FR** | ~ | 1.8 | 4.7 | 5.1 | 7.2 | ***41.2%*** |
| 18 | Cartoon One | **IT** | 1.9 | 1.8 | 5.9 | ~ | ~ | ***~*** |
| 19 | Luk Internacional | **ES** | 9.8 | 13.4 | 12.4 | 7.2 | 5.7 | ***-20.8%*** |
| 20 | Folimage Studio | **FR** | 3.0 | 3.6 | 7.3 | 5 | ~ | ***~*** |
| 21 | BRB Internacional | **ES** | 6.2 | 6.8 | 4.2 | 4.8 | ~ | ***~*** |
| 22 | Les Cartooneurs associés | **FR** | 7.0 | 4.2 | 2.1 | 1.6 | 4.4 | ***175.0%*** |
| 23 | Your Family Entertainment AG | **DE** | 5.7 | 4.8 | 6.9 | 5.3 | 3.9 | ***-26.4%*** |
| 24 | Filmax Animation S.L. [2] | **ES** | 2.8 | 6.6 | 0.7 | 3.9 | ~ | ***~*** |
| 25 | Kayenta Production | **FR** | 10.3 | 11.7 | 6.7 | 3.4 | ~ | ***~*** |
| 26 | Toons' n' Tales Filmproduktion GmbH | **DE** | ~ | ~ | 1.4 | 3.3 | ~ | ***~*** |
| 27 | Imira Entertainment S.L. | **ES** | 2.6 | 4.1 | 3.6 | 3.1 | 3.3 | ***6.5%*** |
| 28 | Bayard Jeunesse Animation | **FR** | 2.2 | 3.7 | 0.5 | 0.7 | 3.2 | ***357.1%*** |
| 29 | Motionworks GmbH | **DE** | 1.9 | 2.8 | 4.0 | 3.1 | 3.0 | ***-3.1%*** |
| 30 | Philippe Mounier Marketing Production | **FR** | 0.9 | 1.6 | 1.2 | 1.4 | 2.7 | ***92.9%*** |
| **Companies in bankruptcy or receivership** | | | | | | | | |
| *p.m.* | BKN International AG (cons.) [3] | **DE** | 13.9 | 18.0 | 20.0 | – | – | **–** |
| *p.m.* | Futurikon | **FR** | 24.0 | 18.8 | 18.7 | – | – | **–** |
| *p.m.* | Carrere Group [4] | **FR** | 6.4 | 6.5 | 4.6 | – | – | **–** |
| *p.m.* | TV Loonland AG [5] | **DE** | 9.0 | 7.5 | 13.0 | – | – | **–** |
| *p.m.* | BAF Berlin Animation Film GmbH | **DE** | ~ | 5 | 3.2 | – | – | **–** |

1. 2007 over 16 months.
2. BKN International AG announced that the Local District Court of Cologne gave the order to institute main insolvency proceedings on October 1, 2009. All the main assets of the BKN Group acquired by Emba Media Management International (CY).
3. In receivership.
4. Bankruptcy in 2009.
5. Bankruptcy. Rights assets acquired by m4e Television GmbH in 2011.

Source: European Audiovisual Observatory

T.9.5

# TV news agencies in Europe

## 2006-2010

Operating revenues in EUR million.

The ranking does not include the news services integrated into broadcasting companies nor the TV news services of all media news agencies.

| Rank | Company | Country | 2006 | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|
| 1 | Independent Television News Ltd | GB | 147.2 | 131.6 | 110.5 | 110.7 | 112.8 | 1.9% |
| 2 | Associated Press Television News Ltd | GB | 83.1 | 80.7 | 93.5 | 87.0 | 94.3 | 8.4% |
| 3 | C Productions | FR | 24.2 | 25.3 | 54.1 | 56.9 | 61.3 | 7.7% |
| 4 | Agencia de Televisión Latinoamericana de Servicios y Noticias España S.A. [1] | ES | 60.8 | 60.3 | 52.2 | 49.6 | ~ | ~ |
| 5 | I & U Information und Unterhaltung TV Produktion GmbH & Co. KG | DE | ~ | 36.3 | 44.1 | 40.8 | ~ | ~ |
| 6 | CAPA Press | FR | 28.5 | 28.0 | 30.7 | 27.6 | 36.5 | 32.2% |
| 7 | Juin Media | FR | 26.3 | 26.7 | 32.9 | 31.1 | 30.9 | -0.8% |
| 8 | Europe News | FR | 23.4 | 26.7 | 26.2 | 27.4 | 25.8 | -5.7% |
| 9 | Productions Tony Comiti | FR | 11.0 | 14.1 | 13.2 | ~ | ~ | ~ |
| 10 | Canal Mundo Producciones Audiovisuales S.A. | ES | 10.9 | 12.1 | ~ | ~ | 12.4 | ~ |
| 11 | News and Pictures Fernsehen GmbH *est.* | DE | 11.0 | 11.0 | 11.0 | 12.0 | 11.6 | -3.3% |
| 12 | Maximal News Television | FR | 3.8 | 8.1 | 12.2 | 11.2 | 8.4 | -24.8% |
| 13 | Medianews Produccion de Noticias | ES | 8.9 | 10.8 | 8.0 | ~ | ~ | ~ |
| 14 | Story Box Press | FR | 2.1 | 7.4 | 5.2 | 5.0 | 5.5 | 9.1% |
| 15 | Capa Prod | FR | 4.2 | 5.6 | 8.6 | 4.3 | 5.4 | 26.5% |
| 16 | Films du Soleil | FR | 4.4 | 4.4 | 5.3 | 5.0 | ~ | ~ |
| 17 | World Television Ltd. | GB | 6.5 | 6.0 | 5.1 | 4.3 | 4.7 | 9.3% |
| 18 | DFA Deutsche Fernseh Nachrichten Agentur | DE | ~ | 4.5 | ~ | ~ | ~ | ~ |
| 19 | Galaxie Presse | FR | 2.4 | 1.7 | 5.0 | 7.0 | 4.2 | -40.0% |
| 20 | Nep - Tv | FR | 3.6 | 3.7 | 3.6 | 4.3 | 3.1 | -28.4% |
| 21 | AIMV | FR | 2.4 | 2.8 | 2.7 | 3.1 | ~ | ~ |
| 22 | Tournez s'il vous plaît | FR | 0.7 | 0.8 | 1.4 | 1.8 | 2.9 | 65.2% |
| 23 | 2DAYUK | GB | 6.8 | 5.7 | 3.6 | 3.2 | 2.7 | -15.6% |
| 24 | Instant News Service | BE | 2.2 | 3.0 | 3.4 | ~ | 2.6 | ~ |
| 25 | Sunset Presse | FR | 2.6 | 2.7 | 1.9 | 3.2 | 2.5 | -21.9% |
| 26 | La Cote Bleue SA | FR | 3.6 | 3.4 | 3.1 | 2.8 | 2.3 | -17.3% |
| 27 | Paris Press | FR | 2.3 | 2.5 | 2.1 | 1.8 | 2.2 | 20.3% |
| 28 | Ouest Info | FR | 2.9 | 2.8 | 3.3 | 2.3 | 2.1 | -6.7% |
| 29 | Internep | FR | 1.7 | 1.8 | 1.7 | 1.9 | 2.1 | 13.0% |
| 30 | Jan Verbeke Producties | BE | 1.6 | 1.8 | 2.1 | 2.0 | 2 | 0.0% |

[1] Dissolved in July 2011.

Source: European Audiovisual Observatory

T.9.6

# The 30 leading European TV programme distribution and audiovisual rights management companies 2007-2010

Operating revenues in EUR million.
European subsidiaries of companies from third countries not included.

| Rank | Company | Country | Rights | Ownership | 2007 | 2008 | 2009 | 2010 | 2010/09 |
|---|---|---|---|---|---|---|---|---|---|
| 1 | BBC Worldwide Ltd | GB | All types | BBC | 807.0 | 759.2 | 1 043.5 | 1 172.0 | *12.3%* |
| 2 | Highlight Communications AG | CH | Sports/Video | Constantin Media AG | 292.8 | 353.1 | 435.5 | 439.5 | *0.9%* |
| 3 | Sociedad general de Produccion y Exploitacion de contenidos SL | ES | All types | Imagina Media Audiovisual | 134.0 | 146.3 | 164.4 | 186.5 | *13.4%* |
| 4 | Telemünchen International GmbH | DE | All types | Telemünchen | ~ | 150.0 | 150.0 | ~ | ~ |
| 5 | Sporta Sportrechte- und Marketing-Agentur GmbH *est.* | DE | Sports | ZDF/ARD | 142.2 | 144.5 | 142.8 | ~ | ~ |
| 6 | M6 ("Droits audiovisuels" activity) | FR | All types | M6/RTL Group | 114.2 | 112.9 | 138.9 | 135.4 | *-2.5%* |
| 7 | Sportfive | FR | Sports | Lagardere | 155.0 | 185.1 | 145.8 | 129.6 | *-11.1%* |
| 8 | ZDF Enterprises GmbH (cons.) | DE | All types | ZDF | 100.5 | 125.3 | 123.6 | ~ | ~ |
| 9 | INA - Institut national de l'audiovisuel | FR | All types | – | 120.0 | 124.5 | 122.8 | 123.0 | *0.2%* |
| 10 | TF1 D.S. | FR | Sports | TF1 | – | – | – | 120.7 | – |
| 11 | ITV Global Entertainment Ltd | GB | All types | ITV PLC | 113.9 | 99.7 | 110.0 | 116.5 | *5.9%* |
| 12 | AB Droits Audiovisuels | FR | Fiction | Claude Berda | ~ | ~ | ~ | 116.0 | ~ |
| 13 | Infront Sports & Media AG | CH | Sports | Jacobs Holding AG | ~ | ~ | 97.5 | 115.3 | *18.3%* |
| 14 | Advanced Inflight Alliance AG (cons.) | DE | Airplane screenings | | 86.0 | 109.7 | 108.5 | 111.5 | *2.8%* |
| 15 | Media Partners & Silva Ltd | IE | Sports | | 39.1 | 87.2 | 100.8 | 110.6 | *9.7%* |
| 16 | Wild Bunch | FR | Feature films | | 70.0 | 75.6 | 153.3 | 108.7 | *-29.1%* |
| 17 | Telepool GmbH (cons.) | DE | All types, feature films | ARD/SRG | 119.0 | 103.4 | 108.2 | ~ | ~ |
| 18 | Plazamedia GmbH *est.* | DE | Sports | Constantin Media AG | 75.0 | 75.0 | 75.0 | 75.0 | – |
| 19 | Endemol Worldwide Distribution Holding PLC | GB | Entertainment | Mediaset/Cyrte | 40.6 | 36.9 | 50.1 | 87.5 | *74.7%* |
| 20 | TF1 Droits audiovisuels | FR | All types | TF1 | 122.6 | 94.5 | 104.3 | 77.5 | *-25.7%* |
| 21 | RAI Trade | IT | All types | RAI | 82.0 | 80.9 | 78.7 | 72.7 | *-7.6%* |
| 22 | France Télévision Distribution (FTD) | FR | All types | France Télévisions | 66.3 | 65.8 | 68.8 | 55.3 | *-19.6%* |
| 23 | Banijay International Aps | DK | All types | | ~ | ~ | ~ | 44.3 | ~ |
| 24 | Nord License AS | NO | All types | Cyfrowy Polsat | 26.0 | 49.6 | 38.8 | 43.7 | *12.6%* |
| 25 | Beta Film GmbH | DE | All types | Eos | 29.8 | 50.8 | 35.5 | ~ | ~ |
| 26 | All3Media International Ltd | GB | All types | All3Media Ltd | 7.7 | 23.0 | 25.4 | 32.2 | *26.8%* |
| 27 | Studio Hamburg Distribution & Marketing | DE | All types | ARD | ~ | 19.8 | 18.6 | ~ | ~ |
| 28 | Canal+ Image UK Ltd | GB | Feature films | Canal+/Vivendi | 12.0 | 11.2 | 15.4 | 15.9 | *3.2%* |
| 29 | tmc Content Group AG | CH | Adult | | 26.7 | 24.5 | 15.1 | 15.4 | *2.0%* |
| 30 | Channel Four International Ltd (1) | GB | All types | Channel 4 | 26.3 | 13.6 | ~ | ~ | ~ |

(1) 2007 over 11 months, 2008 over 16 months.

Source: European Audiovisual Observatory

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## Organisations which provided pan-European data for this volume

## Organismes ayant fourni des données paneuropéennes pour ce volume

## *Organisationen, die mit gesamteuropäischen Angaben zu diesem Band beigetragen haben*

### EUROPEAN BROADCASTING UNION (EBU) http://www.ebu.ch

#### Strategic Information Service (SIS)

The SIS is the research unit of the EBU specializing in economic and market analysis and works with all functional departments within the EBU.

It conducts data collection, primary research, and surveys; compiles and analyses information; and makes results available through published reports, presentations, and other communication. In addition, SIS procures existing published studies/expertise and maintains one of the most extensive and up-to-date repositories of media publications in Europe.

SIS is engaged in the ongoing study of media markets throughout Europe. The unit collects information about all EBU Members; tracks actual market conditions and trends in the television, radio, and new media; analyses industry structures; and investigates the competitive environment.

*Head of SIS:* Alexander Shulzycki

#### Service d'information stratégique (SIS)

Le SIS constitue l'unité de recherche de l'Union Européenne de Radio-Télévision (UER) pour l'analyse économique et l'étude des marchés.

Le SIS œuvre en collaboration avec les divers départements de l'UER afin de recueillir l'information, mener à bien études, recherche primaire et enquêtes, compiler et analyser les données et mettre à disposition les résultats sous forme de publications, présentations et toute autre forme de communication. De plus, le SIS facilite l'accès aux études et aux connaissances spécialisées existant par ailleurs, et maintient un référentiel de publications média parmi les plus complets et les plus à jour en Europe.

Le SIS poursuit actuellement une étude au long cours portant sur les différents marchés médiatiques à travers l'Europe, recueillant des données relatives aux activités de tous les membres de l'UER, suivant de près l'évolution des marchés ainsi que les tendances des secteurs télévision, radio et nouveaux médias, analysant les structures du paysage audiovisuel et étudiant la situation en matière de concurrence.

*Responsable du SIS :* Alexander Shulzycki

#### *Strategic Information Service (SIS)*

SIS ist die Recherche-Abteilung der EBU. Sie ist auf Wirtschafts- und Marktanalysen spezialisiert und arbeitet mit allen operativen Abteilungen der EBU zusammen.

SIS führt Datensammlungen, -erhebungen und Umfragen durch; trägt Informationen zusammen und analysiert sie; und veröffentlicht die Ergebnisse in Publikationen, Präsentationen und durch andere Kommunikationswege. Darüber hinaus stellt SIS bestehende publizierte Studien/Gutachten zur Verfügung und pflegt eine der umfangreichsten und aktuellsten Sammlungen von Medienpublikationen in Europa.

SIS befasst sich mit der laufenden Beobachtung der europäischen Medienmärkte. Die Abteilung sammelt Informationen zu allen EBU-Mitgliedern; verfolgt aktuelle Marktlagen und Entwicklungen in den Bereichen Fernsehen, Radio und Neue Medien; analysiert Industriestrukturen; und untersucht das Wettbewerbsumfeld.

*Leiter SIS :* Alexander Shulzycki

### SCREEN DIGEST http://www.screendigest.com

Publisher of European audiovisual information and statistics for the past thirty years. The main activity of Screen Digest is the publication of a monthly magazine, Screen Digest, which contains the latest news and references on European and global audiovisual developments, as well as statistics.

Thematic information areas: market and economic information from the whole of Europe, especially relating to video, new technologies and multimedia.

Screen Digest édite des informations et des statistiques sur l'audiovisuel depuis 30 ans. Son activité principale est la publication mensuelle du magazine Screen Digest, contenant des informations récentes sur l'audiovisuel, des références bibliographiques sur les développements dans le secteur de l'audiovisuel en général et en Europe en particulier, ainsi que des statistiques.

Domaine thématique : informations sur les marchés d'Europe, plus particulièrement sur les industries du cinéma, de la vidéo, des nouvelles technologies et du multimédia.

Verlag für europäische audiovisuelle Informationen und Statistiken aus den letzten 30 Jahren. Die Haupttätigkeit von Screen Digest ist die Veröffentlichung der Monatsschrift Screen Digest, die die neuesten Nachrichten und Hinweise auf weitere Informationen über europäische und internationale audiovisuelle Entwicklungen sowie Statistiken enthält.

Themenbereich: Markt- und Wirtschaftsinformationen aus ganz Europa, besonders für die Bereiche Film, Video, neue Technologien und Multimedia.

## Organisations which provided pan-European data for this volume

(Continued)
(Suite)
(Fortsetzung)

### MAVISE http://mavise.obs.coe.int

MAVISE is a unique free online database, developed by the European Audiovisual Observatory for the DG Communication of the European Commission. It provides a full overview of all EU television markets plus Croatia and Turkey. MAVISE contains detailed information on over 8 900 TV channels, 6 000 TV companies, as well as the line-ups of more than 400 DTT, cable, satellite, IPTV or DVB-H packagers.

### The Directorate-General Communication of the European Commission

The mission of the Directorate-General Communication is to :

- provide the citizens of the 27 countries of the European Union with information on EU policy and their direct implications for the citizens, by using all appropriate means (e.g. the web portal Europa, EuTube and the Europe Direct network and contact centre)
- promote increased media coverage of European questions - in full editorial independence in order to contribute to the development of a European public sphere and democratic debate. Therefore, the European Commission provides broadcasters with sound and image elements, both live or from the archives, as well as technical means through: “Europe by Satellite”, an AV web portal with thematic collections of images on current topics, audiovisual archives on Europe (www.ec.europa.eu/avservices), and a calendar of EU events. Furthermore, it contributes, via financial support, to the development of European radio and TV networks producing and distributing programmes on European issues.

The European Commission supports media pluralism and editorial independence.

## Organismes ayant fourni des données paneuropéennes pour ce volume

Accessible gratuitement et en ligne, MAVISE est une base de données unique en son genre qui a été développée par l’Observatoire européen de l’audiovisuel pour la DG Communication de la Commission européenne. Elle fournit un aperçu complet de tous les marchés télévisuels dans l’UE, ainsi qu’en Croatie et en Turquie. MAVISE contient des informations détaillées concernant plus de 8 900 chaînes, 6 000 sociétés de télévision, ainsi que les données sur plus de 400 ensembliers dans les domaines de la TNT, du câble, du satellite, de l’IPTV ou du DVB-H.

### La Direction Générale Communication de la Commission européenne

La Direction Générale Communication a pour mission:

- de mettre à la disposition des citoyens des 27 pays de l’Union européenne des informations sur les politiques de l’UE et leurs implications directes pour les personnes par des moyens appropriés (portail web europa, EuTube, réseaux d’Europe Direct et Contact Centre...) ;
- de favoriser une couverture accrue des affaires européennes – en toute indépendance éditoriale - afin de contribuer au développement d’un espace public européen et d’un débat démocratique. Alors, la Commission européenne met à la disposition des opérateurs qui le souhaitent, des sons, des images, live ou d’archives, ainsi que des capacités techniques à travers : “Europe by Satellite”, un Portail web incluant des portefeuilles thématiques d’images sur des thèmes d’actualité et archives audiovisuelles de l’Europe (www.ec.europa.eu/avservices) et un Calendrier électronique des événements UE. Par ailleurs, elle contribue, par un soutien financier, au développement de réseaux européens de radio et de TV produisant et distribuant des programmes dédiés aux affaires européennes.

La Commission européenne soutient le pluralisme des médias et leur indépendance éditoriale.

## *Organisationen, die mit gesamteuropäischen Angaben zu diesem Band beigetragen haben*

MAVISE ist eine einzigartige kostenlose Online-Datenbank, die von der Europäischen Audiovisuellen Informationsstelle für die Generaldirektion Kommunikation der Europäischen Kommission entwickelt wurde. Sie bietet einen vollständigen Überblick über alle EU-Fernsehmärkte plus Kroatien und die Türkei. Die Datenbank MAVISE enthält detaillierte Angaben zu mehr als 8 900 Fernsehsendern, 6 000 Fernsehgesellschaften sowie eine Aufstellung von über 400 DVB-T, Kabel-, Satellit-, IPTV- oder DVB-H-Paketanbieten.

### *Die Generaldirektion Kommunikation der Europäischen Kommission*

Die Mission der Generaldirektion Kommunikation der Europäischen Kommission ist es:

- den Bürgern der 27 Mitgliedstaaten der EU Informationen über die EU-Politik und deren direkte Implikationen für die Bürger zur Verfügung zu stellen. Dies geschieht unter Nutzung aller entsprechenden Kommunikationswege, wie z.B. dem Webportal Europa, EuTube und dem Europe Direct Netzwerk und Kontaktzentrum;
- die Berichterstattung insbesondere durch audiovisuelle Medien über europäische Fragen – unter der Berücksichtigung der vollen redaktionellen Unabhängigkeit – zu fördern, um zur Entwicklung einer europäischen Öffentlichkeit und demokratischen Debatten beizutragen. Um dies zu erreichen, stellt die Europäische Kommission Rundfunkanbietern Ton- und Bildmaterial, sowohl Live als auch Archivmaterial, als auch technische Mittel mit Hilfe der folgenden Ressourcen zur Verfügung: „Europe by Satellite“, ein AV-Webportal mit thematischen Sammlungen von Bildern zu aktuellen Themen, audiovisuelle Archive zu Europa (www.ec.europa.eu/avservices) und einen Kalender zu EU-Veranstaltungen. Darüber hinaus trägt die Kommission durch finanzielle Unterstützung zur Entwicklung von europäischen Radio- und Fernsehnetzwerken bei, die Programme zu europäischen Themenstellungen produzieren und handeln.

Die Europäische Kommission unterstützt Medienvielfalt und redaktionelle Unabhängigkeit.

## Organisations which provided pan-European data for this volume

## Organismes ayant fourni des données paneuropéennes pour ce volume

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### Warc http://www.warc.com

Warc is the most comprehensive marketing information service in the world. It is a trusted resource, recognised for the provision of the latest in-depth information and cutting-edge thinking.

Its unique online service is relied upon by the global marketing, advertising, media, research and academic communities. It provides authoritative forecasts of advertising expenditure for all major economies, used by researchers worldwide. Warc.com is the single best source of case studies, best practice guides, marketing intelligence, consumer insight, industry trends and latest news from around the world.

Alongside its website, Warc has two other areas of activity:

- Magazines and Journals: Warc publishes five highly respected magazines and market leading journals for people working in advertising, marketing, media and research: *Admap, Market Leader, International Journal of Advertising, Journal of Advertising Research* and *International Journal of Market Research*.
- Events: Warc organises a range of premium conferences and seminars covering topical issues of interest to marketing people across the globe.

Warc est le service d'information marketing le plus complet au monde. Il s'agit d'une ressource de confiance, connue pour fournir les informations détaillées les plus récentes ainsi que pour sa réflexion d'avant-garde.

Son service en ligne unique est utilisé par les communautés internationales du marketing, de la publicité, des médias, de la recherche et des universités. Ses prévisions des dépenses publicitaires de toutes les grandes économies, utilisées par les chercheurs du monde entier, font autorité. Warc.com est l'unique et meilleure source d'études de cas, de guides de bonnes pratiques, de veille stratégique, de connaissance des consommateurs, de tendances de l'industrie et d'actualités récentes provenant du monde entier.

Parallèlement à son site Web, Warc a deux autres domaines d'activité :

- Magazines et journaux : Warc publie cinq magazines et journaux très respectés, leaders sur le marché, ciblant les personnes travaillant dans la publicité, le marketing, les médias et la recherche : *Admap, Market Leader, International Journal of Advertising, Journal of Advertising Research* et *International Journal of Market Research*.
- Manifestations : Warc organise une série de conférences et séminaires de haut niveau sur des questions d'actualité qui intéressent les gens du marketing du monde entier.

Das Warc ist der weltweit umfassendste Dienst für Marketinginformationen. Als zuverlässige Quelle wird das Zentrum für seine immer aktuellen und fundierten Informationen sowie für seine präzise Analysen weithin anerkannt.

Der einzigartige Onlinedienst des Warc wird rund um den Globus von Akteuren aus den Bereichen Marketing, Werbung, Medien sowie Forschung und Lehre genutzt. Er liefert zuverlässige – und weltweit von Forschern genutzte – Prognosen der Werbeausgaben aller großen Volkswirtschaften. Warc.com ist die beste Einzelquelle für Fallstudien, Best Practice Guides, Marketing Intelligence, Verbraucherverhalten, Industrietrends und die aktuellsten Nachrichten aus aller Welt.

Neben seiner Website hat das Warc noch zwei weitere Tätigkeitsschwerpunkte:

- Fachzeitschriften: Das Warc publiziert fünf hoch angesehene und marktführende Fachzeitschriften für Menschen, die in den Bereichen Werbung, Marketing, Medien und Forschung tätig sind: *Admap, Market Leader, International Journal of Advertising, Journal of Advertising Research* sowie *International Journal of Market Research*.
- Veranstaltungen: Das Warc organisiert eine Reihe von Premium-Konferenzen und Seminaren zu marketingrelevanten Themen für Interessenten aus aller Welt.

# Abbreviations

# Abréviations

# *Abkürzungen*

## List of abbreviations used in this volume

## Liste des abréviations utilisées dans le présent volume

## *In diesem Band verwendete Abkürzungen*

| | | | |
|---|---|---|---|
| **–** | not applicable | ne s'applique pas | trifft nicht zu |
| **~** | not available | non communiqué | keine Angabe |
| **adtv** | private television company financed by advertising | entreprise privée de télévision financée par la publicité | werbefinanzierte private Fernsehunternehmen |
| **CATV** | Cable Television | télévision par câble | Kabelfernsehen |
| **DTH** | direct-to-home | réception directe par satellite | direct-to-home |
| **DTT** | Digital terrestrial television | (=TNT) | (=DVB-T) |
| **DVB-H** | Digital Video Broadcasting - Handheld | Digital Video Broadcasting - Handheld | Digital Video Broadcasting - Handheld |
| **DVB-T** | (=DTT) | (=TNT) | Digital Video Broadcasting - Terrestrial |
| ***est.*** | estimate | estimation | Schätzung |
| **hs** | home shopping | téléachat | Homeshopping |
| **IPTV** | Internet Protocol Television (television through broadband) | Internet Protocol Television (télévision par réseaux large bande) | Internet Protocol Television (Fernsehen über Breitband) |
| **ISP** | Internet Service Provider | Fournisseurs d'accès à Internet (FAI) | Internet-Anbieter |
| ***p.m.*** | pro memoria | pour mémoire | pro memoria |
| **MMDS** | Microwave Multipoint Distribution System | Microwave Multipoint Distribution System | Microwave Multipoint Distribution System |
| **packtv** | packager/aggregator of TV services | ensemblier/agrégateur de services TV | Anbieter von Programmpaketen |
| **paytv** | pay-TV (film premium) | télévision à péage (films premium) | Pay-TV (Premium-Filme) |
| **PPV** | pay-per-view | péage à la consommation | Pay-per-View |
| **PR** | private | privé | privat |
| **PS** | public service | service public | öffentlich-rechtlich |
| **rtv** | regional or local television company | entreprise de télévision régionale ou locale | regionale oder lokale Fernsehunternehmen |
| **Sat-TV** | Television by satellite | télévision par satellite | Satellitenfernsehen |
| **SMATV** | Satellite Master Antenna Television | Satellite Master Antenna Television | Satellite Master Antenna Television |
| **sptv** | public television company | entreprise publique de télévision | Öffentlich-rechtliche Fernsehanstalt |
| **thtv** | publisher of private thematic channel(s) | éditeur de chaîne(s) thématique(s) | Betreiber von privaten Spartenkanälen |
| **TNT** | (=DTT) | télévision numérique terrestre | (=DVB-T) |
| **VoD** | Video on Demand | vidéo à la demande (=VàD) | Video-on-Demand |

Data in italics are estimated or provisional.

Les données en italiques sont estimées ou provisoires.

Kursiv gedruckte Daten sind geschätzt oder vorläufig.

# VAT rates on audiovisual and telecommunication products and services

## as at 1.1.2012

The purpose of this table is to provide information on the VAT rate as an element of explanation of market trends and European strategy of international stakeholders.

The European Audiovisual Observatory has no expertise in fiscal issues. The following table is compiled by the Observatory from data collected by the European Commission [1], the IVF and the EFARN network.

This information has not been verified by national fiscal authorities. The qualification of some services, and therefore the VAT applicable, may be matter of discussion, in particular when related to new services. The Observatory cannot be held responsible for its accuracy or completeness.

| Country | Standard rate | Cinema | Video | Pay-TV subscription | Online distribution of television and VoD (rental/ purchase/SVoD) services | Radio-TV licence fee | Broadcasting transmission (terrestrial, cable, IPTV) | Telephone/ Internet connexion services |
|---|---|---|---|---|---|---|---|---|
| **AT** | 20 | 10 | 20 | 20 | 20 | 10 | 10/20 | 20 |
| **BE** | 21 | 6 | 21 | 21 | 21 | – | 21 | 21 |
| **BG** | 20 | 20 | 20 | 20 | | 20 | 20 | 20 |
| **CY** | 15 | 5 | 15 | 15 | | 15 | 15 | 15 |
| **CZ** | 20 | 14 | 20 | 20 | | *exempt* | 20 | 20 |
| **DE** | 19 | 7 | 19 | 19 | 19 | *exempt* | 19 | 19 |
| **DK** | 25 | 25 | 25 | 25 | | 25 | 25 | 25 |
| **EE** | 20 | 20 | 20 | 20 | 20 | 20 | 20 | 20 |
| **ES** | 18 | 8 | 18 | 18 | | 18 | 18 | 18 |
| **FI** | 23 | 9 | 23 | 23 | 23 | 9 | 23 | 23 |
| **FR** | 19.6 | 7 | 19.6 | 7 | 19.6 | 2.1 | 7 | 19.6 |
| **GB** | 20 | 20 | 20 | 20 | 20 | *exempt* | 20 | 20 |
| **GR** | 23 | 13 | 23 | 13 | | *exempt* | 13 | 23 |
| **HU** | 27 | 27 | 27 | 27 | | *exempt* | 27 | 27 |
| **IE** | 23 | 9 | 23 | 23 | | *exempt* | 23 | 23 |
| **IT** | 21 | 10 | 21 | 21 | 21 | 4 | 21 | 21 |
| **LT** | 21 | 21 | 21 | 21 | | 21 | 21 | 21 |
| **LU** | 15 | 3 | 15 | 3 | 15 | *exempt* | 15 | 15 |
| **LV** | 22 | 22 | 22 | 22 | | – | 22 | 22 |
| **MT** | 18 | 5 | 18 | 18 | | *exempt* | 18 | 18 |
| **NL** | 19 | 6 | 19 | 19 | 19 | *exempt* | 19 | 19 |
| **PL** | 23 | 8 | 23 | 8 | 23 | 23 | 23 | 23 |
| **PT** | 23 | 13 | 23 | 23 | 23 | 23 | 23 | 23 |
| **RO** | 24 | 11 | 24 | 24 | 24 | 24 | 24 | 24 |
| **SE** | 25 | 6 | 25 | 25 | 25 | *exempt* | 25 | 25 |
| **SI** | 20 | 8.5 | 20 | 20 | 20 | *exempt* | 20 | 20 |
| **SK** | 20 | 20 | 20 | 20 | 20 | *exempt* | 20 | 20 |
| **VAT rates in selected Non-EU Countries (%)** | | | | | | | | |
| **CH** | 8 | 2.44 | 8 | 8 | 8 | | | |
| **HR** | 22 | 0 | 22 | 22 | | | | |
| **IS** | 25.5 | 25.5 [2] | 25.5 | 7 | 25.5 | ~ | 25,5 | 25,5 |
| **MK** | 18 | 18 | 18 | | | | | |
| **NO** | 25 | 8 | 25 | 25 | | | | |
| **RU** | 18 | 0 | 18 | 18 | 18 | 18 | 18 | 18 |
| **TR** | 18 | 8 | 18 | 18 | | | | |

[1] See the document *VAT Rates Applied in the Member States of the European Union. Situation at 1st January 2012*, European Commission, taxud.c.1(2012)134284-EN.

[2] Exemption for national films.

Source: European Audiovisual Observatory based on data provided by the European Commission, IVF and EFARN

## Members of the European Audiovisual Observatory

## Membres de l'Observatoire européen de l'audiovisuel

## *Mitglieder der Europäischen Audiovisuellen Informationsstelle*

| | | | |
|---|---|---|---|
| **AL** | Albania | Albanie | Albanien |
| **AT** | Austria | Autriche | Österreich |
| **BA** | Bosnia and Herzegovina | Bosnie-Herzégovine | Bosnien-Herzegowina |
| **BE** | Belgium | Belgique | Belgien |
| **BG** | Bulgaria | Bulgarie | Bulgarien |
| **CH** | Switzerland | Suisse | Schweiz |
| **CY** | Cyprus | Chypre | Zypern |
| **CZ** | Czech Republic | République tchèque | Tschechische Republik |
| **DE** | Germany | Allemagne | Deutschland |
| **DK** | Denmark | Danemark | Dänemark |
| **EE** | Estonia | Estonie | Estland |
| **ES** | Spain | Espagne | Spanien |
| **FI** | Finland | Finlande | Finnland |
| **FR** | France | France | Frankreich |
| **GB** | United Kingdom | Royaume-Uni | Vereinigtes Königreich |
| **GR** | Greece | Grèce | Griechenland |
| **HR** | Croatia | Croatie | Kroatien |
| **HU** | Hungary | Hongrie | Ungarn |
| **IE** | Ireland | Irlande | Irland |
| **IS** | Iceland | Islande | Island |
| **IT** | Italy | Italie | Italien |
| **LI** | Liechtenstein | Principauté de Liechtenstein | Fürstentum Liechtenstein |
| **LT** | Lithuania | Lituanie | Litauen |
| **LU** | Luxembourg | Luxembourg | Luxemburg |
| **LV** | Latvia | Lettonie | Lettland |
| **ME** | Montenegro (since March 2012) | Montenegro (depuis mars 2012) | Montegro (Ab März 2012) |
| **MK** | "The former Yugoslav Republic of Macedonia" | "Ex-République yougoslave de Macédoine" | "Ehemalige jugoslawische Republik Mazedonien" |
| **MT** | Malta | Malte | Malta |
| **NL** | Netherlands | Pays-Bas | Niederlande |
| **NO** | Norway | Norvège | Norwegen |
| **PL** | Poland | Pologne | Polen |
| **PT** | Portugal | Portugal | Portugal |
| **RO** | Romania | Roumanie | Rumänien |
| **RU** | Russian Federation | Fédération de Russie | Russische Föderation |
| **SE** | Sweden | Suède | Schweden |
| **SI** | Slovenia | Slovénie | Slowenien |
| **SK** | Slovak Republic | République slovaque | Slowakische Republik |
| **TR** | Turkey | Turquie | Türkei |
| | | | |
| **EUR** | European Union | Union européenne | Europäische Union |

## European States non-members of the European Audiovisual Observatory

## Etats européens non-membres de l'Observatoire européen de l'audiovisuel

## *Europäische Staaten, die nicht Mitglied der Informationsstelle sind*

| | | | |
|---|---|---|---|
| **BY** | Belarus | Bielorussie | Weißrussland |
| **MD** | Moldova | Moldavie | Moldawien |
| **UA** | Ukraine | Ukraine | Ukraine |

## Non-European States

## Etats non-européens

## *Außereuropäische Staaten*

| | | | |
|---|---|---|---|
| **CO** | Colombia | Colombie | Kolumbien |
| **DZ** | Algeria | Algérie | Algerien |
| **EG** | Egypt | Egypte | Ägypten |
| **IL** | Israel | Israël | Israel |
| **JO** | Jordan | Jordanie | Jordanien |
| **JP** | Japan | Japon | Japan |
| **LB** | Lebanon | Liban | Libanon |
| **MA** | Morocco | Maroc | Marokko |
| **SA** | Saudi Arabia | Arabie Saoudite | Saudi-Arabien |
| **SY** | Syrian Arabic Republic | République arabe de Syrie | Arabische Republik Syrien |
| **TN** | Tunisia | Tunisie | Tunesien |
| **US** | United States of America | Etats-Unis d'Amérique | Vereinigte Staaten von Amerika |

# Film, television and video in Europe

## YEARBOOK 2011

The three-volume European Audiovisual Observatory Yearbook offers a comprehensive overview of the audiovisual sector in the Observatory's 37 member states.

Data from more than 1,000 different sources are collected and analysed, and information is presented in over 500 graphs and tables. The result is a unique overview of Europe's audiovisual markets in film, television and video.

The impartiality of the data presented is guaranteed by the Observatory's status as a pan-European public body.

The three volumes of the Yearbook constitute an outstanding source for all those involved in the audiovisual sector, whether policy makers, professionals or academics.

# Film, télévision et vidéo en Europe

## ANNUAIRE 2011

L'Annuaire de l'Observatoire européen de l'audiovisuel présente en trois volumes une analyse complète du secteur audiovisuel (cinéma, télévision et vidéo) dans ses 37 Etats membres.

La préparation et l'exploitation de données issues de plus de mille sources différentes et la présentation des résultats en plus de cinq cents graphiques et tableaux donnent une vue d'ensemble unique du marché en Europe.

Le statut d'organisme de service public paneuropéen garantit l'impartialité de ces données.

Le présent Annuaire en trois volumes constitue de ce fait une remarquable source d'information pour les professionnels, les décideurs et les scientifiques.

# *Film, Fernsehen und Video in Europa*

## JAHRBUCH 2011

Das Jahrbuch der Europäischen Audiovisuellen Informationsstelle gibt für ihre 37 Mitgliedstaaten in drei Bänden einen umfassenden Überblick über die Entwicklung des audiovisuellen Sektors in den Bereichen Film, Fernsehen und Video.

Die Aufbereitung und Auswertung von mehr als 1000 Einzelquellen und die Darstellung der Ergebnisse in über 500 Graphiken und Tabellen verschaffen in Europa einen einmaligen Marktüberblick.

Die Neutralität der Darstellung wird durch den öffentlich-rechtlichen Status der Europäischen Audiovisuellen Informationsstelle garantiert.

Damit bietet das vorliegende Jahrbuch mit seinen drei Bänden eine hervorragende Informationsquelle für alle Zielgruppen in der Politik, in der Industrie und in der Wissenschaft.