



2009

A N N U A L R E P O R T



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I - Letter from Philippe Delusinne

ACT President & CEO RTL Belgium

Dear ladies and gentlemen,

As new President of the Association of Commercial Television in Europe (ACT), I would like to introduce myself to you. My name is Philippe Delusinne and I am CEO of RTL Belgium and was elected President of the ACT in June 2009.

I am very grateful for having been offered this new position, as I am convinced that Europe is of key importance to us as businesses, but also for us as citizens. Being a Belgian national, I have been brought up in a multicultural environment close to the heart of the EU institutions.

The timing of my new term coincides with great change in the EU institutions. In June 2009, a new European Parliament (EP) was elected and while I am writing this message, a new European Commission is taking office. But we also see change in the wider environment. The economic crisis has affected the economies worldwide and led to dramatic adaptations in some sectors. Politically, we have seen President Obama taking office on the mantra of "change".

So where do we as commercial broadcasters stand in such an environment? Obviously change is also the key word for us, relating to technology or, more to the point, how technology will be used by consumers.

Technology changes so fast that not only regulators but also we as businesses have to keep pace – often without knowing what might come next.

With a double-digit decline in advertising revenues in almost all European markets, the economic crisis has hit our sector hard. Faced with the simultaneous impact of the economic downturn and technological change, we ask ourselves how far these changes are structural, or cyclical. Nobody has the answer to this question as yet...



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However, we often face another important question, which is whether television will be able to survive in the future. This is a question I can answer:

Television will not only survive, it will thrive.

TV is still developing fast and TV viewing is actually increasing - people are spending more time watching television than ever. Today the average worldwide viewing time is measured by Eurodata at 188 minutes per day in 2008, one minute more than in 2007. In Europe, too, we see a trend towards more TV consumption, not less. In most European countries the average daily viewing time amounts to more than 200 minutes per day, or more than 23 hours per week. We have television on all kinds of platforms and innovative devices and the viewer can watch audiovisual content when, where and on what platform he wants. Instead of formerly 47 national channels, we see a huge variety of 3,346 channels only in Europe.

But do people watch television differently? Yes, they watch TV on a variety of platforms and use different media platforms at the same time. Recent surveys show that 22% of viewers tend to watch TV while also using the Internet.

Against this background it becomes clear that TV will also in the future have a key role in our society. Not only from an economic point of view, given that we employ hundreds of thousands of people and that among the largest ACT members we estimate spending around €10 billion every year on content. No, television also has an important social role to play. People always want to be informed and entertained and tune in to watch key events.

Latest rating successes – whether in sports, entertainment or news – are testimony to the continuing good health of television: 47 million viewers watched this year's UEFA Champions' League final. The medical drama series *Dr. House* has attracted 81.8 million viewers in 66 countries worldwide. Over 10 million viewers watched the first performance by Susan Boyle in the talent show *Britain's Got Talent* and 17.3 million viewers tuned in for the final, not to mention her performance being viewed more than 100 million times over the Internet. News programmes have also been very successful, with some of our channels' news programmes having reached up to 43% of the audience in their markets.

It is the attractiveness of TV and people's enduring interest in it, which ensure that TV – sometimes combined with other platforms – will also in future remain the key medium to reach out to mass audiences.

That is for the future. Today we are celebrating *20 Years of Commercial Television in Europe*. We look back to the very start of commercial TV in Europe and give examples about how our channels contribute to public value with their wide range of programmes broadcast all over Europe. The Television without Frontiers-Directive (TVWF) is also twenty years old and is still the key legislative instrument to regulate our increasingly pluralistic audiovisual media landscape. Within the ACT, we have also seen tremendous growth over the last twenty years. Having started our association with five members in 1989, we now have 27 members active in 34 European countries.

I am pleased to invite you to take a look at this first Annual Report of the ACT. It gives you insight into what our channels do, how our sector contributes to economic growth in Europe and how commercial broadcasters manage on a daily basis to come up with creative, informative and entertaining content attracting millions of viewers every day. Compared to the ACT's former publications, you will find more economic data but also more insight into the visions and strategies of our CEOs. A large section on the different CSR activities of our members explains how commercial broadcasters take action for society and the environment, engage with children, help fight obesity and support the poor. In order to give you an overview about the activities of our members in the individual European markets, the last section of the Report focuses again on the national outlook.

With best regards,



Philippe Delusinne

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II - CEOs & Media Executives About Television

About the value of TV



GERHARD ZEILER,
CEO RTL Group - "About the Value of Television"

(20. Medienforum NRW, 10 June 2008):

- ■ What is the value of television? If you ask me, that is something that each one of us ultimately has to decide for ourselves. And I really mean each and every person – not a select few on behalf of others. The remote control allows every single person to make their individual decision:

Whether to watch, when to watch, what to watch, when to change the channel and, finally, when to turn off the TV!

Commercial broadcasters fulfil an important societal task in our country. We communicate political information, we show social realities – and we entertain people. We cannot solve all problems – but we are not responsible for all problems, either. And we believe that we contribute to the solution when pointing at them. ■ ■

PETER BAZALGETTE,
Former Chief Creative Officer Endemol and British Media Expert

(The Guardian, 27 November 2008):

- ■ If you asked consumers of television what it's for they'd give you some politically correct guff about news and nature documentaries. But if you charted their viewing you'd establish the overwhelming purpose of television is really to entertain: that is why it remains the only genuine mass medium. ■ ■



MIKE DARCEY,
COO BSkyB

(Institute of Economic Affairs, 30 June 2009):

- ■ Customers don't care about pipes, platforms or plumbing. What they care about is great TV. And we're proud of the part Sky plays in delivering that. ■ ■



DENNIS M. WHARTON,
Executive Vice President of Media Relations, National Association of Broadcasters (NAB)

(August 2009):

- ■ Despite the numerous challenges facing broadcast television, this is a business and profession that has the capacity to educate, enlighten and entertain tens of millions of viewers each and every day. Television networks and their local affiliates are also reliable 'first informers' in times of crisis, saving countless lives with emergency weather warnings and raising millions of dollars in charity year after year. Despite the naysayers, television's future remains bright, and with the advent of digital and mobile DTV, broadcasters will remain the pre-eminent entertainment medium for decades to come. ■ ■



JEREMY DARROCH,
CEO BSkyB

(Institute of Economic Affairs, June 2008):

- ■ I see a competitive and dynamic marketplace, which is delivering real benefits for consumers: more choice, more innovation, and more value. ■ ■



CAROLYN FAIRBAIRN,
Group Strategy Director ITV

(Media Week, 7 July 2009):

- ■ Our broadcast business is increasing its audience share for the first time in 27 years. Our digital channels, already the most successful family of channels in the UK, are bucking market trends and continuing to grow and we are diversifying to take advantage of new opportunities and technologies. ■ ■



TONY COHEN,
CEO Fremantle Media

(Changing Media Summit 2009):

- ■ We're often told that the days of broadcast television as a mass medium are over. Not true, not yet. Audience share for the (top four shows) has actually gone up and so did the absolute numbers. TV does mass medium better than ever. ■ ■

Television remains lead medium

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NICOLAS DE TAVERNOST,
Chairman of the Board M6 Group & Former President of the ACT 2003 - 2009
(Les Echos, 29 June 2009):

- The market is very difficult. If M6 seems to have stood up better in this delicate situation, then it is thanks to its audiences, which remain around 11% among viewers aged 4 and above and 18% among housewives less than 50 years old, despite competition from new channels. This means it is standing up better than all the historical operators. ■■



GERHARD ZEILER,
CEO RTL Group – “Adapting to the new market reality”
(The Worldview Address, Media Guardian Edinburgh International Television Festival, 29 August 2009):

- TV is still and will continue to be THE lead medium. No other medium can build brands as effectively or make such a significant impact on customers as TV. No other medium catches as strongly the emotions and the hearts of the viewers. (...) The basic human need to lean back, relax and be entertained remains unchanged. It's what television does so well and it's precisely what viewers expect and appreciate, perhaps even more so in these difficult economic times. Let's not forget: we need to challenge viewers with ambitious ideas that take us into new territories. We need to think in experimentation, we need to remain resolute in the face of failure and we need to risk all on our passion. That's what we are here to do. ■■



JEFF ZUCKER,
CEO NBC Universal
(WSJ.com, 2 June 2009):

- I think television in the aggregate is actually in very good shape. Whether we watch, consume content on a phone or online or wherever, the content first appears almost all the time on television. We're in this transition period of figuring out how to deal with all the new technology that is out there, but television still proves to be the granddaddy of them all. ■■



CHRISTIAN VAN THILLO,
CEO De Persgroep
(October 2009):

- In the ever increasing choice of media, consumers fall back on brand names, namely titles, stations and sites that they trust and which they know a lot of other people trust, too. We are social creatures who like to talk to one another about what we have all read, seen and heard. That's why the strongest media brand names do so well with their readers, watchers and listeners. ■■



FEDELE CONFALONIERI,
CEO Mediaset
(August 2009):

- Commercial television made a significant contribution to the opening and development of the market, guaranteeing qualified occupation and continuous innovation. The digital revolution that many countries are now experiencing is just the most recent example. If the united Europe of today is an economic and technological giant, we can take some of the credit.

By working together over these years we have managed to overcome the sometimes grey world of state TV. We have offered viewers new programmes, expanded the horizons of entertainment and culture. And we have also offered a new world of information, with a wealth of different opinions and points of view, along with a level of previously unknown pluralism. ■■



BOB BAKISH,
President of MTV Networks International (MTVNI)
(September 2009):

- We always strive to bring the best quality entertainment to our audiences across all media platforms and MTVNI is constantly evolving and looking for fresh ways to distribute this content. We believe that the terrific clarity and surround sound aspect of the High Definition medium are a perfect complement to our music, young adult and kids programming. ■■



NONCE PAOLINI,
CEO TF1
(September 2009):

- The TF1 Group's strategy comprises two main strands: maintaining leadership of the television medium and positioning itself in the 360° media sector. ■■



HANS-HOLGER ALBRECHT,
CEO Modern Times Group (MTG)
(September 2009):

- The development of Viasat On Demand reflects our commitment to make a wide range of free and paid-for programming available to viewers on a flexible “anytime, anywhere” basis via multiple distribution platforms including the Internet. “Play” and “On Demand” services enable viewers to choose when they want to watch popular TV shows, movies and sports events, whilst the latest video streaming and set-top box technology solutions enable broadband connected viewers to enjoy these services on either the TV or the computer. ■■

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**BERTRAND MEHEUT,**
CEO Canal+

(Le Figaro, 13 June 2008):

“With the introduction of digital television and the emergence of new competition from telecom operators, the French audiovisual landscape has seen a profound change. In this context the three founding members of the (new French) Association of Commercial Broadcasters – TF1, M6 and Canal+ – have decided to join forces around the common idea of reinforcing the French commercial broadcasting sector, as we represent an economically important sector employing on a direct and indirect basis 200,000 persons.”

**ADRIAN SARBU,**
CEO of Central European Media Enterprises (CME)

(September 2009):

“We also look to the future. We are always preparing something to launch, whether it's a new channel, a new programme or a new business line. We are currently implementing a new operational model, which will be more diversified, relying not only on advertising revenues but also on subscription, content, Internet and management services revenues.”

**MARK WILLIAMS,**
CEO Sky Deutschland

(September 2009):

“The five elements of our business plan make very clear that the new brand is about far more than a simple change of name: it is a signal that everything has and will improve. Even though Germany has a challenging media environment, I am convinced that we will set a new standard for TV entertainment in Germany and Austria. And I am sure that our customers will appreciate quality, choice, convenience and exclusivity from Germany's and Austria's best TV entertainment platform.”

**JAN SCHERMAN,**
CEO TV4 Group

(September 2009):

“TV4 has been Sweden's largest TV channel for a number of years now. In the early 2000s, the TV4 Group decided to expand its portfolio. We launched several mini-pay and premium channels, as well as increased our focus on online and mobile platforms, and video on demand services. Our multi-channel strategy has been very successful, even during the great and prevailing recession in Sweden, Europe and the rest of the world. TV viewing in Sweden is increasing its overall numbers, and the TV4 Group, via the multi-channel strategy, has increased both the market and the audience shares. We stick to our strategy.”

**BERNHARD GLOCK,**
World Federation of Advertisers (WFA) - President &
Vice-President Media Purchase Procter & Gamble

(July 2009):

“Advertising is essential for the well-being of our free market society. It drives competition, creates jobs, stimulates innovation, and fosters more choice for the consumer. But advertising restrictions put this very much at risk. Regulators must understand this link when formulating policy on advertising.”

**JÜRGEN DOETZ,**
President German Association of Commercial
Broadcasters and Audiovisual Services (VPRT)

(EPD Medien, 29 July 2009):

“The AVMS-Directive is already outdated when being implemented into national law. When visiting EU-Commissioner Viviane Reding in Brussels lately, I informed her that I believe that the Directive needs to be re-evaluated as soon as possible. Otherwise it would not help anything and market realities would not be reflected. It is spooky to imagine all the things that TV may not do, if you look at all advertising opportunities on the Internet. And in addition all the advertising restrictions...”

**NONCE PAOLINI,**
CEO TF1

(September 2009):

“The TF1 operating model is even more relevant than before, because it can limit programming costs whilst still attracting wide audiences, thus giving advertisers an exceptionally broad platform. It is our intention to continue and indeed speed up the changes already underway, so as to achieve our profitability objectives and consolidate our position as market leader.”

**TESS ALPS,**
CEO Thinkbox

(August 2009):

“Advertisers do not fund TV out of philanthropy; their investment is a business self-interest, which has incredible benefits for viewers who receive brilliant programmes in return.”

**CHRISTIAN VAN THILLO,**
CEO De Persgroep

(October 2009):

“Advertisers who are confronted with decreasing revenues no longer ask themselves what is modern and hip in their marketing strategy, but what works. Advertising that works is advertising that causes a “big bang” and you can only achieve that through mass coverage. In times of recession, large, powerful media brands are encountered relatively much less often than the weaker players, a lot of whom will disappear in all types of media. “Free” is not a business model.”

Without advertising no
Free-to-air Television

**MIKE DARCEY,**
COO BSkyB

(Institute of Economic Affairs, 30 June 2009):

- “More and more customers are willing to pay for the content they value. As we know, customers place a high value on entertainment. They have higher levels of disposable income than ever before, but more time pressures in their busy lives. As a result, they are increasingly prepared to pay to get the most out of their precious leisure time.”

**JEREMY DARROCH,**
CEO BSkyB

(FT Digital Media & Broadcasting Conference, 9 March 2009):

- “Today we invest around £1.3 billion a year on programming for our own channels, more than any other British broadcasters apart from the BBC. Of this almost £1 billion is spent in the UK. And our on-screen investment has increased steadily year-on-year, more than doubling over the past decade. In addition, we support channel partners such as UKTV, Discovery and National Geographic with further investment of around £300 million a year.”

**MICHAEL GRADE,**
CEO ITV

(Telegraph, 12 January 2009):

- “Don't let anyone tell you that the golden age of television is ancient history, though. Just take a look at the winter schedules on ITV1 and BBC1 – Lynda La Plante's Above Suspicion, Wuthering Heights, An Englishman in New York, The X Factor, Lark Rise to Candleford, Little Dorrit, Wallander. What all these programmes have in common is huge investment. A high-end 9 o'clock drama on ITV1 costs us about £1 million an hour to produce and broadcast. The big entertainment formats cost well over £500,000 an hour. Quality television is a big – and expensive – business.”

**NICOLAS DE TAVERNOST,**
Chairman of the Board M6 Group &
Former President of the ACT 2003 - 2009

(Les Echos, 29 June 2009):

- “The news is the final piece in the jigsaw making M6 a general-interest channel. It will air at 7.45 pm (...) I am convinced it will be a success. We are going to take our time setting it up and are not setting any target for its audience. What will count is viewers' satisfaction. Around 120 people work on processing information at M6 (...) The Group is in good working order and, given the context of a deep crisis in the marketplace, our aim is to continue doing better than the competition.”

**PHILIPPE DELUSINNE,**
ACT President & CEO RTL
Belgium

(Le Soir, 24 June 2009):

- “The real main issue for us is striking a balance between the public sector and private channels. There are several things we want to see in this respect: a clear (European) definition of public service mission, an independent watchdog to ensure that those missions are fulfilled, and an end to distorted competition stemming from overinvestment by public TV channels.”

certain public service obligations and develop and consolidate national audiovisual industry. We at UTECA support public television. What we object to is public television having commercial content and access to the advertising market. Advertising via communication media should be reserved for private channels. Citizens need to understand that public television is not free and that it is paid for by their taxes. The only true free form of television is the private commercial kind.”

**THOMAS EBELING,**
CEO ProSiebenSat.1 Group

(Frankfurter Allgemeine Zeitung, 4 September 2009):

- “Yes – the less advertising on the public channels ARD and ZDF, the better. Even banning sponsorship in public broadcasting after 8 pm alone would be a success. ARD and ZDF should focus on their core mandate. Real limits should also be imposed on the online expansion of the public broadcasters.”

**THOMAS EBELING,**
CEO ProSiebenSat.1 Group

(Frankfurter Allgemeine Zeitung, 4 September 2009):

- “The Internet is both a challenge and an opportunity. Online piracy harms us, and prosecuting it is difficult. But there are programmes that are less susceptible to illegal downloads. This is where we need to put our focus.”

**JORGE DEL CORRAL,**
Secretary General Spanish Union
of Associated Commercial Television Channels (UTECA)

(Gaceta, 19 January 2009):

- “Where private commercial television is concerned, the customer is the advertiser and it is he who funds the programmes. By contrast, in the case of public channels, viewers fund programming through taxes. That is precisely why public television cannot be a commercial concern and why it must offer programmes, which meet

**PETER FINCHAM,**
Director of Television ITV

(Broadcast, 17 July 2009):

- “We are a business with shareholders to think about. Like the independent producers with which we work closely, we need to make profits to survive (...) No licence fee supports us and public money doesn't protect us. We're fully exposed to the commercial marketplace, but so are most companies in most sectors of industry – no complaints about that.”



TOBIAS SCHMID,
Vice President VPRT & Vice President Media Policy
at RTL Television Germany

(Financial Times Deutschland, 9 June 2009):

- Is it indeed true that nobody dares to inform citizens how much our proud and publicly-financed broadcasting costs them? (...) Private media ranging from print to online and broadcasting can no longer afford to leave this imbalance – which is unique in Europe – uncommented. Considering the requests by other industry sectors one can hardly say that the call for fair competition rules is exaggerated. Looking at all the wishes from other sectors to politicians, it seems nearly naïve that the private media only calls for a correction of the regulatory set-up, which would help them to stabilise by their own means some of the private media offers. ■■



GERHARD ZEILER,
CEO RTL Group – “Adapting to the new market reality”

(The Worldview Address, Media Guardian Edinburgh International Television Festival, 29 August 2009):

- Don't mix Public Service Broadcasting (PSB) with Commercial TV – make a clear distinction between them. (...) In my opinion, PSB and commercial operators should be two sides of the same coin. They should have different goals, seek to attract a different audience spectrum, have different responsibilities and have different content in their programme schedules. ■■



PHILIPPE DELUSINNE,
ACT President & CEO RTL Belgium

(La Libre Belgique, 7 February 2009):

- We're not asking for money. But as a production company that is very active in French-speaking Belgium, we'd definitely like some form of assistance and collaboration with the public authorities to safeguard our development. For example, we'd like to be consulted when initiatives in the audiovisual sector are taken. We must stop being sidelined and considered rich and arrogant people! The ongoing crisis is also affecting RTL Belgium. ■■



JAN SCHERMAN,
CEO TV4 Group

(September 2009):

- A future challenge for the TV4 Group - and for the entire commercial television industry - lies in developing successful business models for the web. It is a difficult challenge, especially given that many public service broadcasters use politically granted licensing fees, charged by the public, to aggressively compete in this area, and to offer free services on the Web. ■■



DAWN AIREY,
Chairman & CEO Five

(Royal Television Society Dinner, April 2009):

- The business model that has sustained commercial public service broadcasting in this country for half a century is being devastated by economic circumstance and new technologies. But commercial TV is not dead and will never be dead and there are things we can do – and are already doing – to put our own house in order and sustain public service plurality. ■■



PEKKA KARHUVAARA,
CEO MTV MEDIA Finland

(September 2009):

- In order to succeed in this financial crisis, commercial media companies need to diversify their activities. MTV MEDIA in Finland has very successfully grown its consumer business by launching several Pay-TV channels as well as popular Internet sites including real estate, travel, gaming and weight control services. Combining Internet and television is the killer application for the future. ■■



NICOLAS DE TAVERNOST,
Chairman of the Board M6 Group
& Former President of the ACT 2003 – 2009

(August 2009):

- During what has been a turbulent year, the M6 Group continued to grow, taking advantage of its strengths: experience, responsiveness and creativity. Our diversification policy remains a strong area of strategic focus. Our family of channels and our presence across a wide variety of media – in addition to the emergence of new distribution media – have particularly enabled us to stand out in a market environment, which is increasingly competitive. ■■



PIOTR WALTER,
Vice-President Television TVN Group & CEO TVN

(September 2009):

- Because of the global crisis we are operating under lower growth and high uncertainty conditions. Our strategic aim for the following years is to strengthen our leading position, both in the programming field (production and the purchasing of programming rights) as well as in the effective use of our competitive advantage resulting from the multi-platform nature of our Group. This includes maximising the potential of the various brands which we own – TVN, Onet, N Platform. Our leading market position in both the television and Internet industries, supported by our development in Pay-TV and TV-shopping, allow us to plan for the strengthening of the Group on the basis of income source diversification, even in tough market conditions, and for further sustainable growth. ■■



ADRIAN SARBU,
CEO Central European
Media Enterprises (CME)

(September 2009):

- Our ability to survive the current economic crisis and position ourselves for future growth depends on our core strengths – our people, our audience share and market leadership and our capability to generate content. Protecting our audience share is our number one objective. Our audience is not interested if we are in a crisis or not; it's interested in having the best TV programmes. We also look to the future. We are always preparing something to launch, whether it's a new channel, a new programme or a new business line. We are currently implementing a new operational model, which will be more diversified, relying not only on advertising revenues but also on subscription, content, Internet and management-services revenues. ■■

FACTS & FIGURES



III.1 Key Figures Today

Television Consumption

Did you know that...?

The worldwide viewing time in 2008 was **188 minutes**, 1 minute more than in 2007. In 2008, television consumption in **Spain** registered a new high, amounting to **227 minutes** on average per person. This was the highest average since 1994 and implied 1.8% growth versus 2007.

(Source: Eurodata TV Worldwide)

Another year of record audience shares

Did you know that...?

ACT members are the **most-watched channels** in no fewer than 17 European countries.

TV News is the most popular news programme in the Czech Republic and the most successful news programme in Europe in terms of audience share. 65% of the Czech audience watch the news programme on TV Nova every day.

(Source: CME)

The cumulative average television audience across the big five European markets for the 2008-2009 **UEFA Champions League** final between Barcelona and Manchester United was 27% up on the all-English final in 2007-2008. A total of **47 million viewers** watched the final, with Spanish broadcaster **Antena 3 TV**'s coverage drawing 11.3 million viewers and **ITV** in the UK attracting 9.6 million.

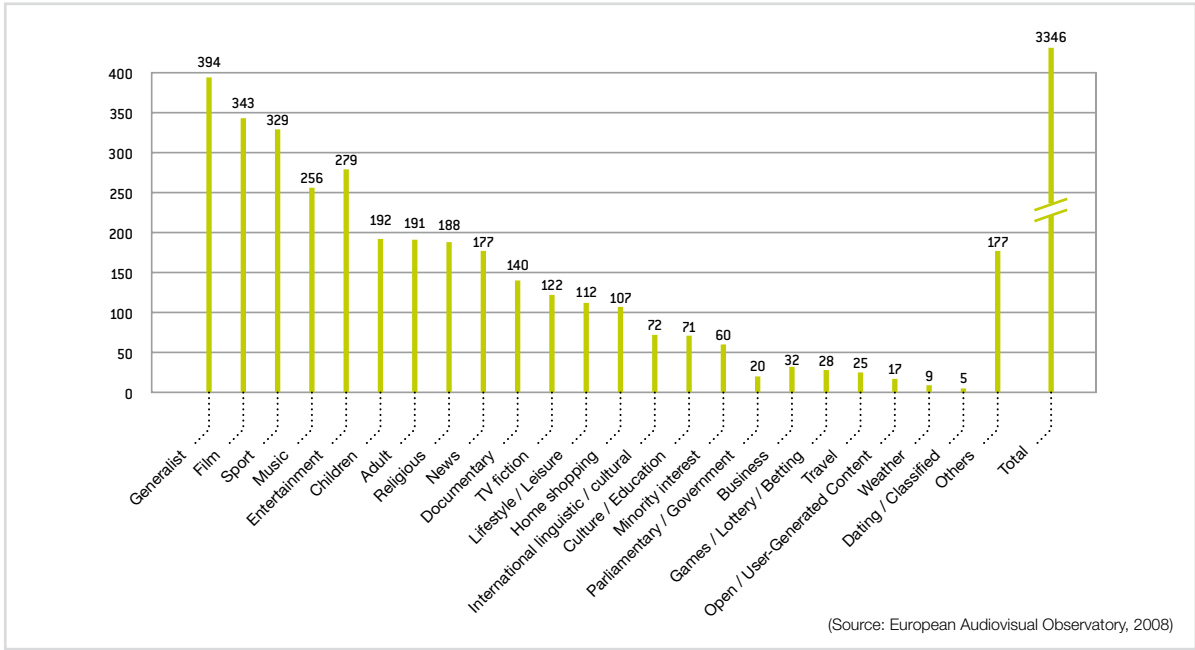
(Source: Eurodata TV Worldwide)

The performance by **Susan Boyle** in the talent show **Britain's Got Talent** was a hit, making her an overnight star with over 10 million viewers watching her first show and **17.3 million viewers** tuning in for the final, not to mention that her performance being viewed more than **100 million times** over the Internet.

Number of channels

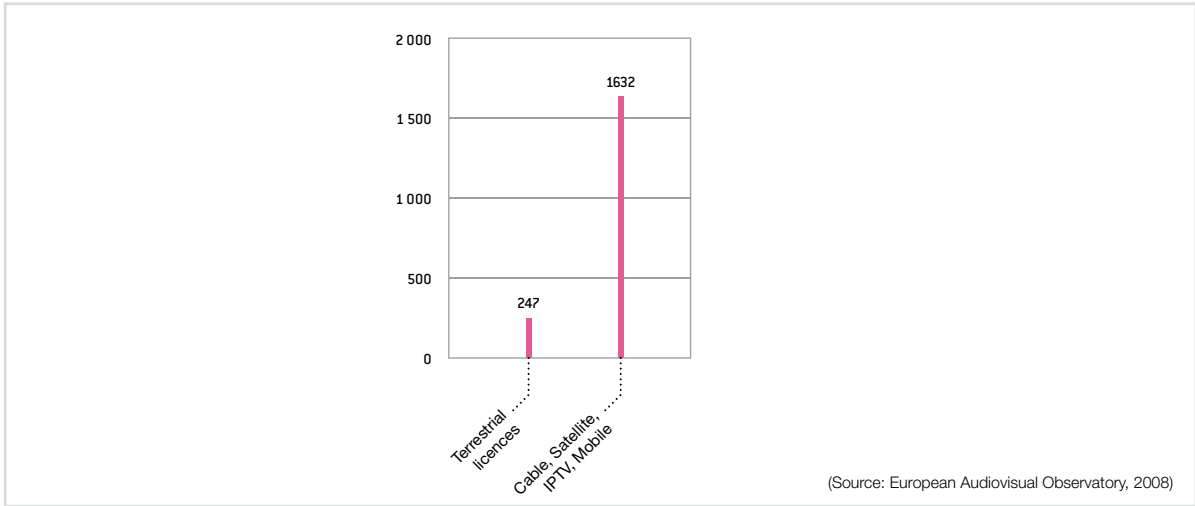
Number of channels by genre (EU + Croatia + Turkey) in December 2008

(time-shifted, windows, regional and local channels not included)



Number of nationwide private channels

(EU 27, December 2008)



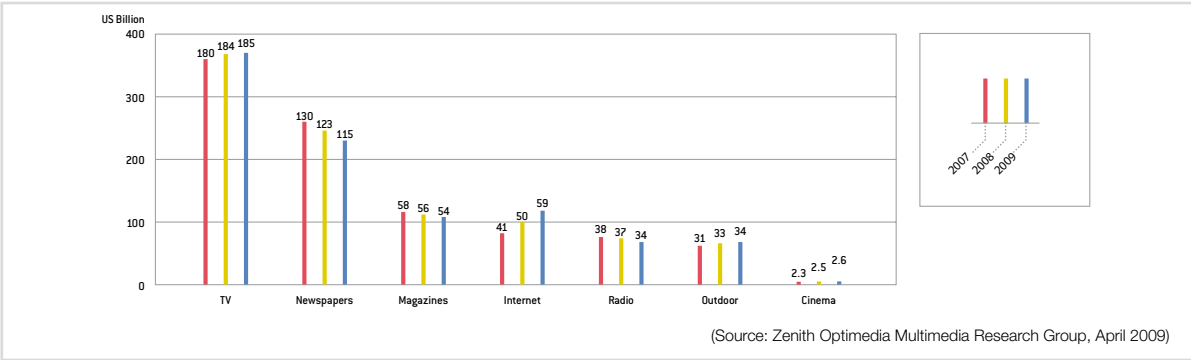
Revenues

Did you know that...?

77% of French viewers claim that they would recall a recent **advertising campaign** more easily when watching it **on TV**. They also recognise the economic role of TV advertising in times of crisis: for 8 out of 10 French, TV helps competition and diversity of products, while 71% of them say that TV contributes to keeping an economy in good shape.

(Source: SNPTV)

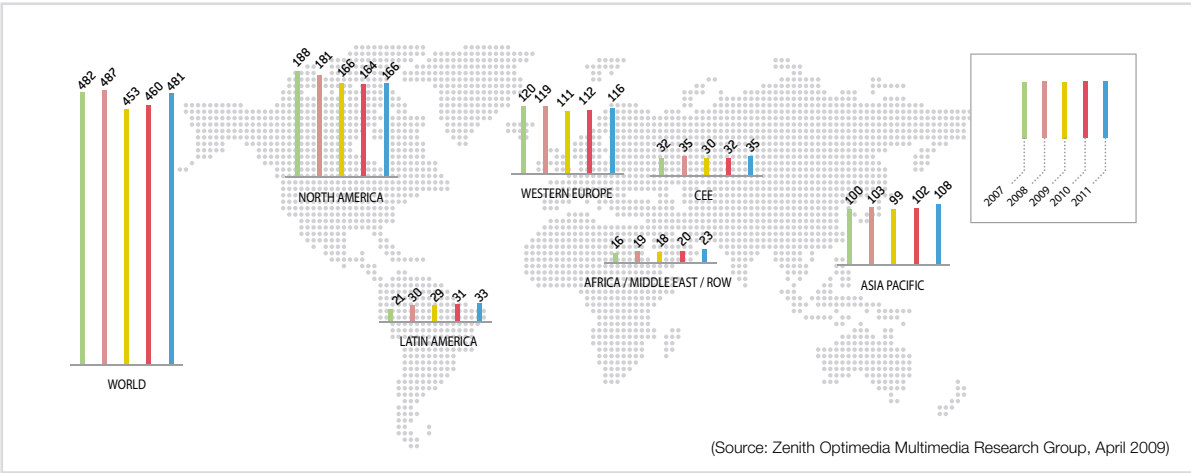
Global advertising spending by medium



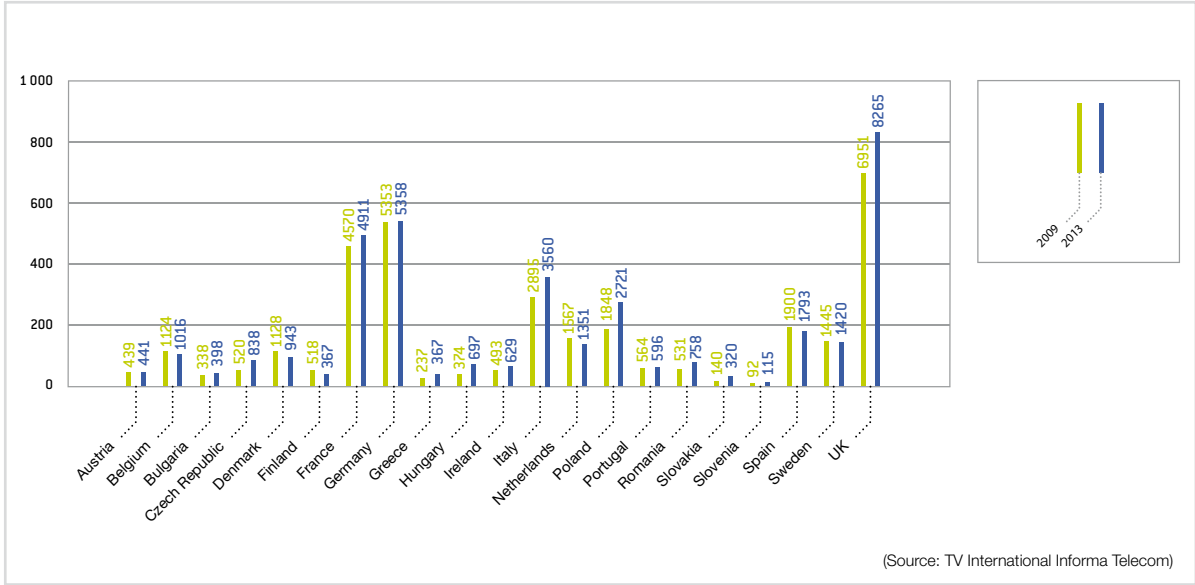
Advertising expenditure by region

Major media (newspapers, magazines, television, radio, cinema, outdoor, Internet)

US\$ million, current prices

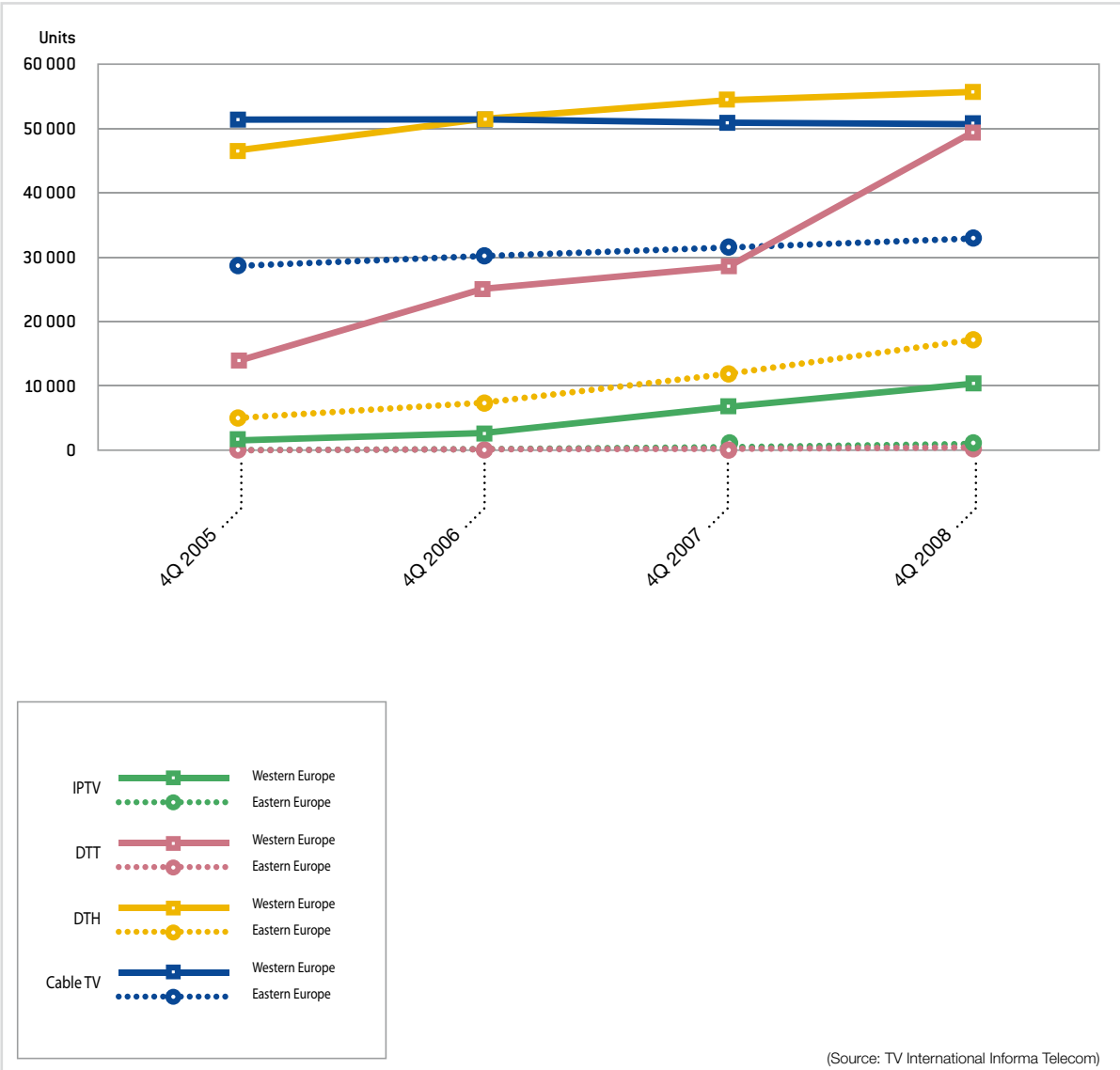


EU-27 Pay-TV revenue growth
(US\$ millions)



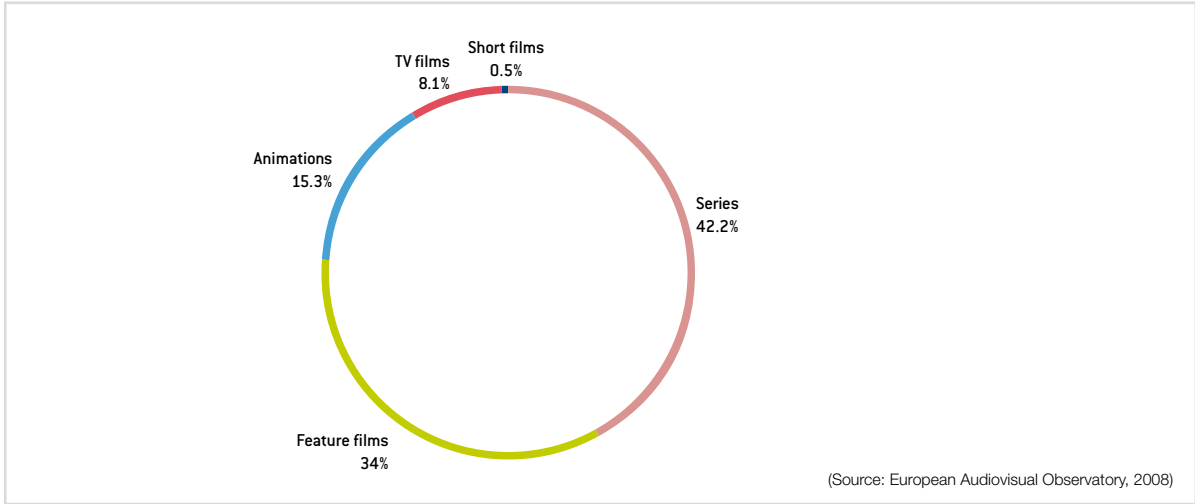
Penetration

Multichannel TV household growth by platform



Programmes

Which European programmes cross borders?
(Expressed as the total of content crossing borders in 2007)



Did you know that...?

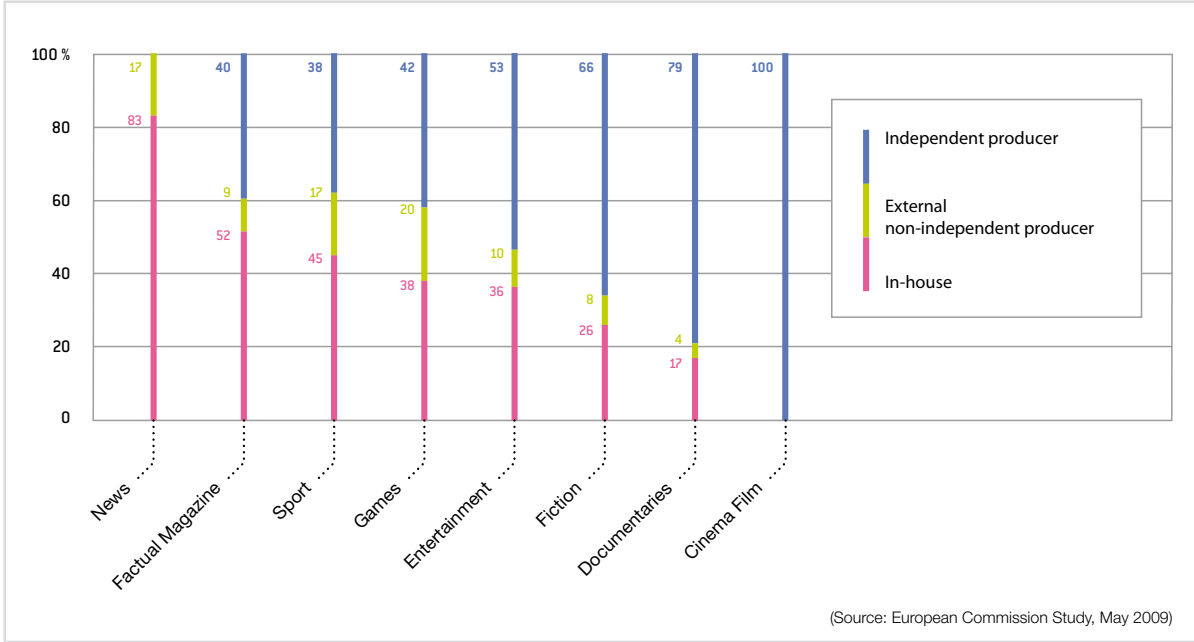
In 2008, **20%** of the peak time schedules (more than 30% of non-news and sport programming) of leading broadcast networks in major European territories is accounted for by **local versions of formats** that have been exploited in several other markets – game shows (*Deal or No Deal*), reality shows (*Big Brother*), talent shows (*Idol*), factual entertainment (*Supernanny*), lifestyle shows (*Queer Eye for the Straight Guy*), telenovelas (*Ugly Betty*), and drama (*Law and Order*).

(Source: Oliver & Ohlbaum Associates, May 2009)

In 2007, **European programmes** and films represented 74% of viewing time, and even 75.5% between 6 pm and 11 pm.

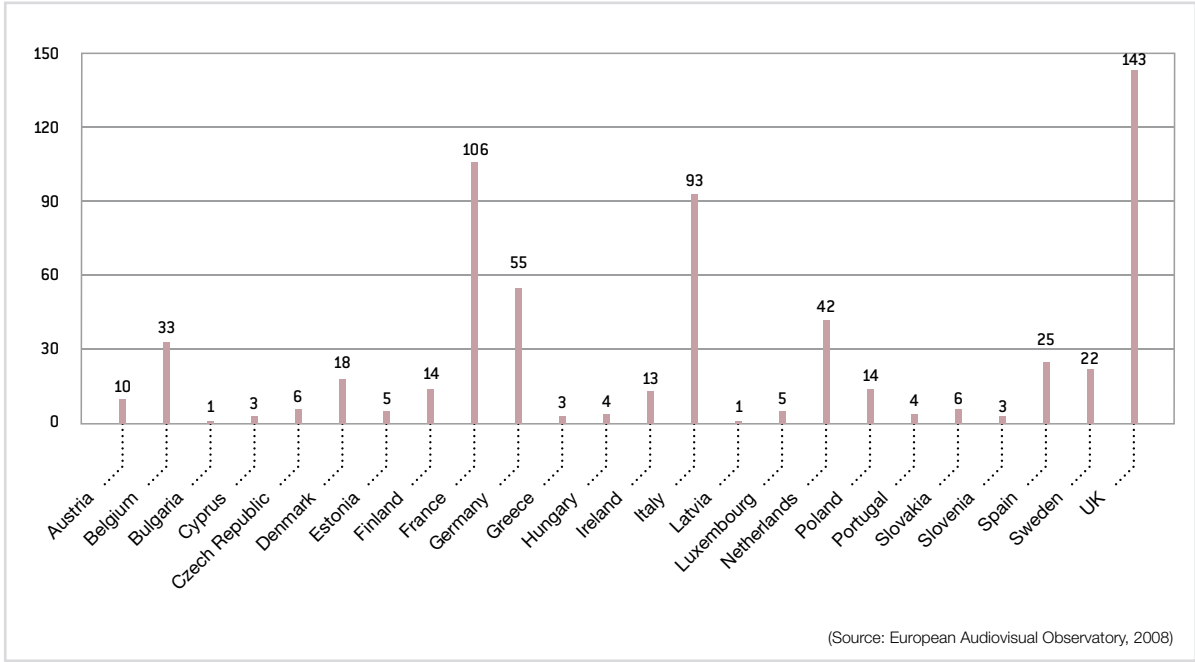
(Source: European Commission, May 2009)

Commissioning by production category
(% of total commissioning spend)



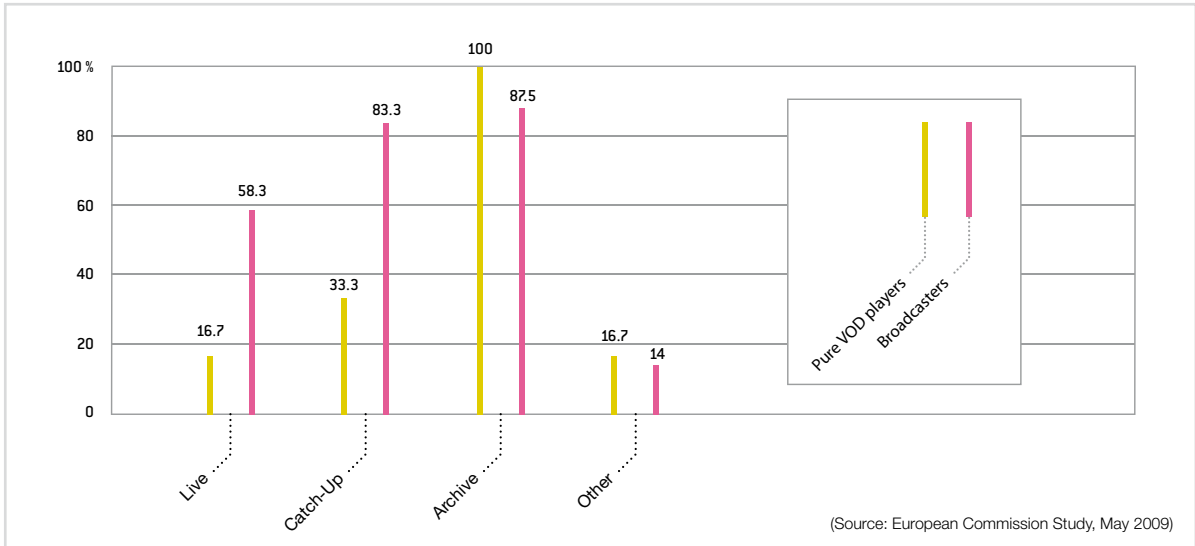
New services

Number of Video-On-Demand services



Type of programming offered on the broadcasters' On-Demand services, 2007

– % of respondents



From abroad

The **US Consumer Electronic Association (CEA)** says that half of prospective TV buyers say they are likely to buy an **Internet-connected TV**. CEA carried out research in December 2008 and analysis shows that 48% of US online adults would use their web-enabled TV to discover more information about upcoming TV shows or to identify a song played during a show.

(Source: AIB London)

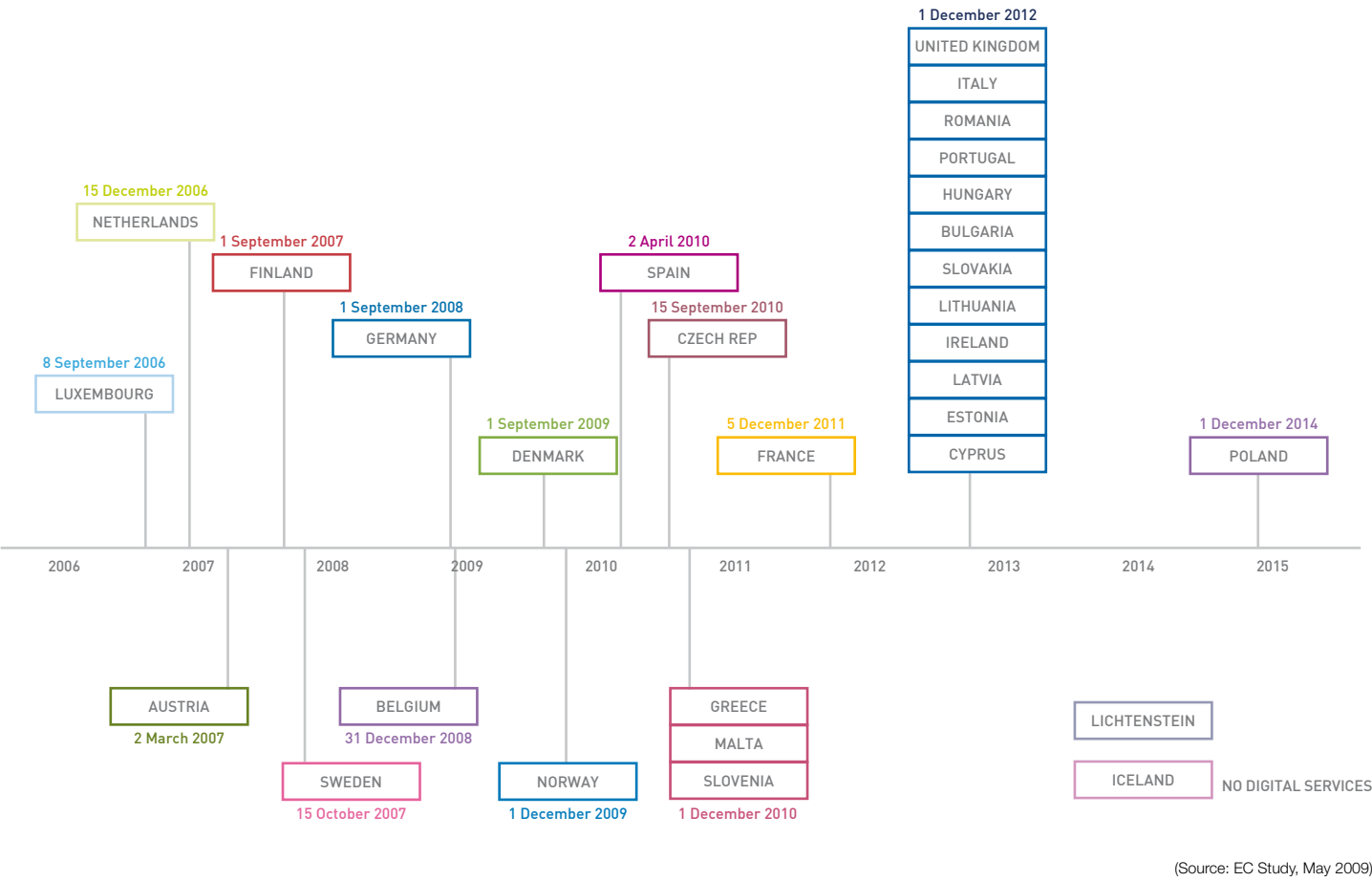
In **Canada**, **48%** of citizens say that **television** is their **main source of information**, according to a poll conducted by the Institute Nanos in May 2009. Television is also the source of information that Canadians trust the most (42%).

“Teens are not abandoning TV for new media. In fact, they **watch more TV** than ever, **up 6%** over the past five years in the US.”

(Source: Nielsen Research, 2009)

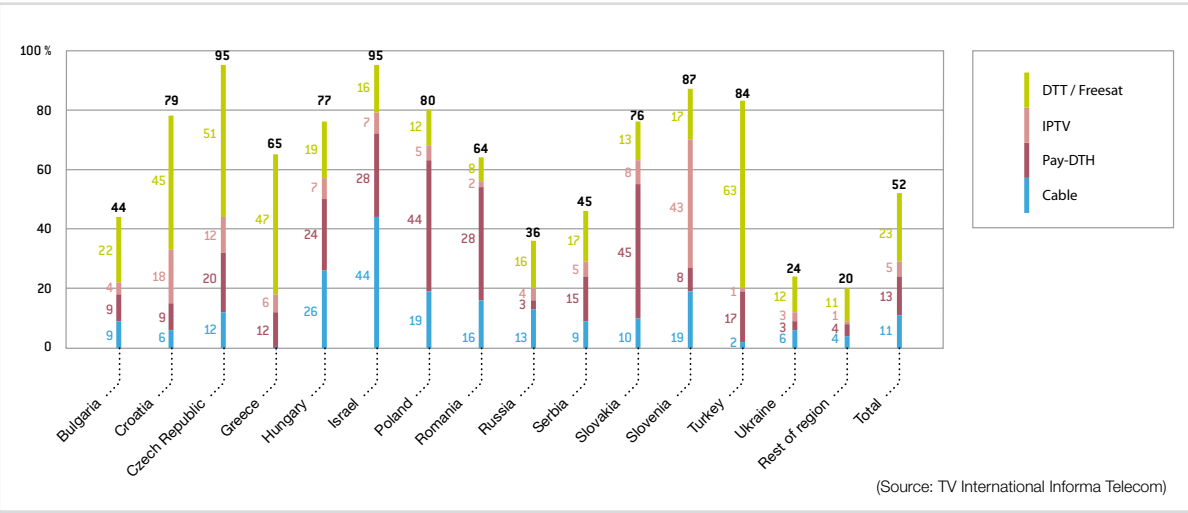


Digital Switchover timeline in Europe

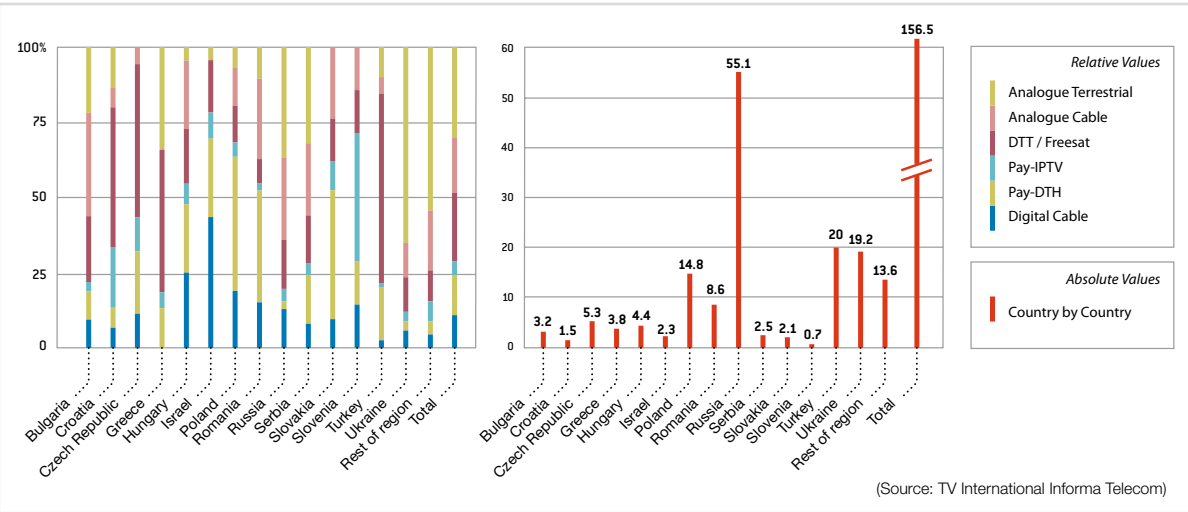


III.2 Key Figures Tomorrow

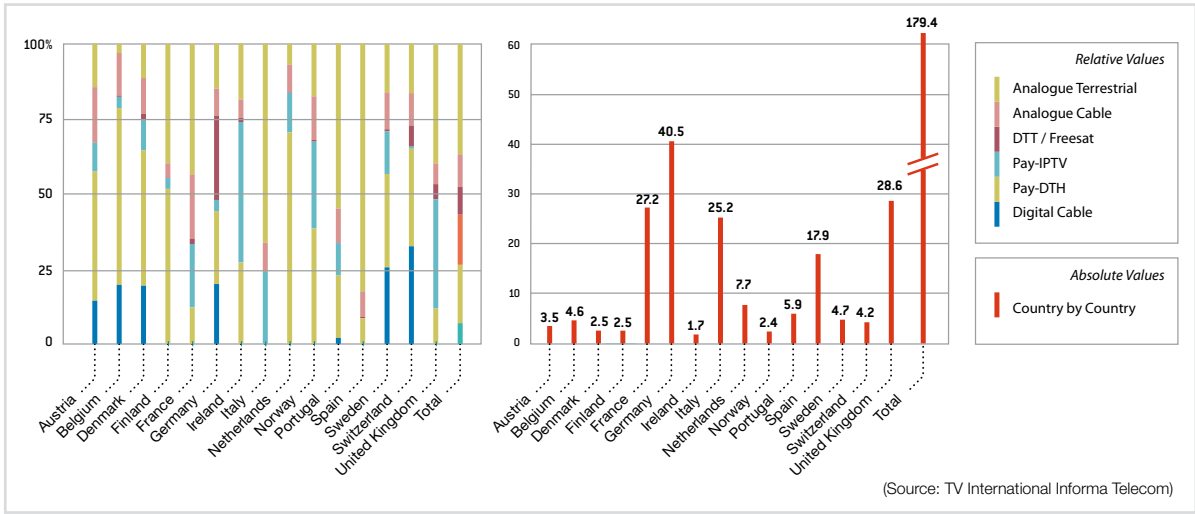
Eastern Europe digital TV penetration in 2013 (%)



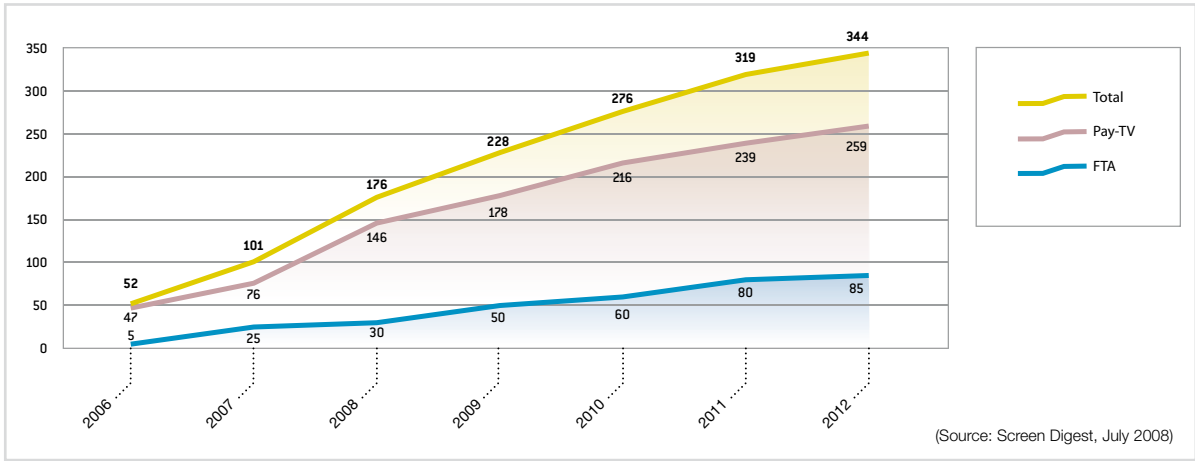
Eastern Europe TV households by platform in 2013 (million)



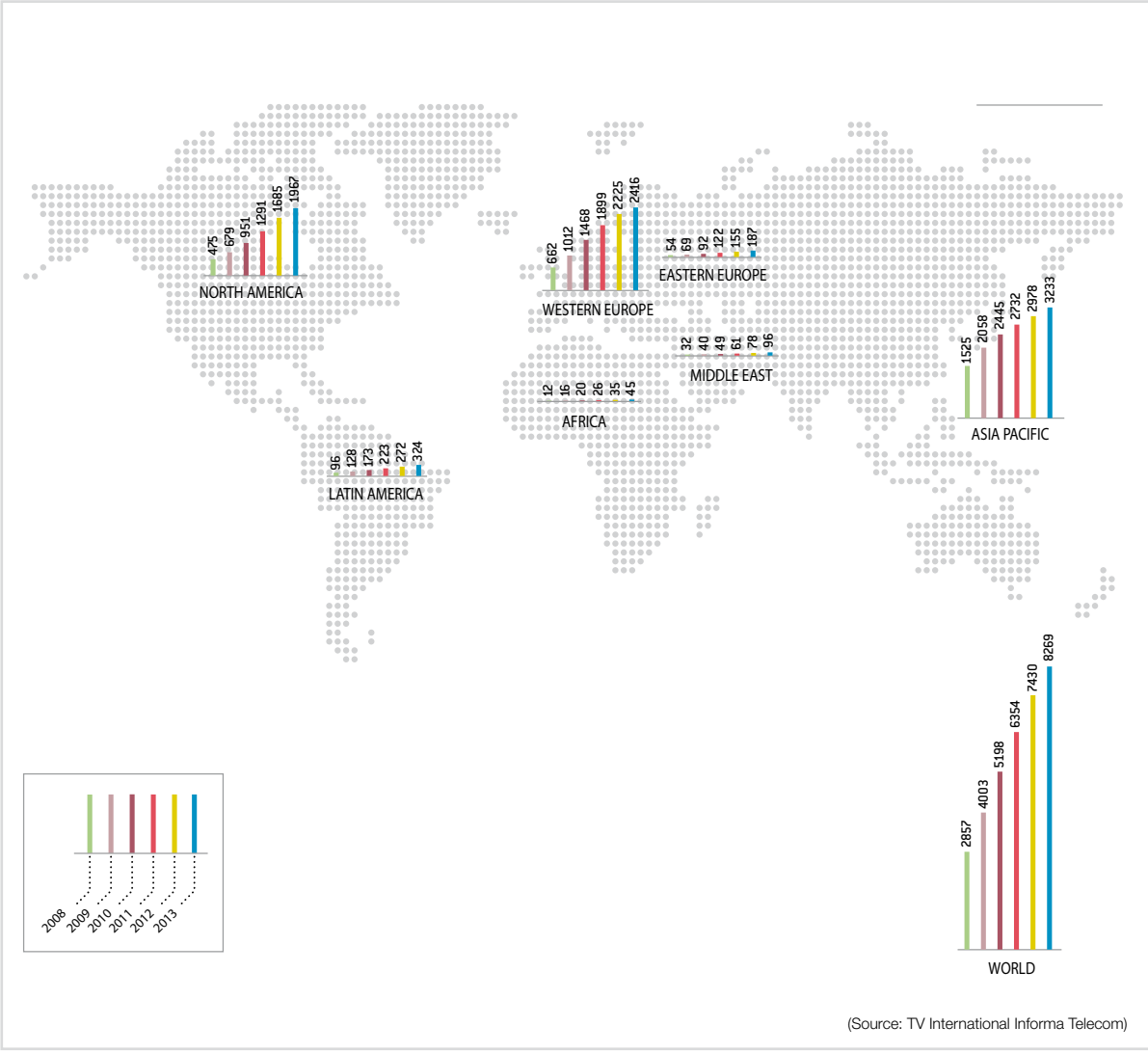
Western European TV households by platform in 2014
(thousands)



Number of HDTV channels to more than triple between 2007 and 2011 in Europe



Global Mobile TV and video revenues, by region, 2008-2013
(US\$ millions)



IV - “Commercial Television in Europe - Then & Now”

Ross Biggam, ACT Director General



Ross Biggam
ACT Director General

This is the first time the ACT has published an Annual Report. In a business sector which is changing fast and becoming increasingly international, we felt there was a need to reflect on some of the changes, to provide pan-European data where possible and to pick out some of the key trends – what are television people and media politicians talking about around Europe?

The ACT is also commemorating twenty years of commercial television in Europe. So we have commissioned a DVD telling the story of commercial television from 1989 to today.

For anyone who, like me, is now in their 40s, 1989 was simply the most fascinating year to be alive. Too young (just about...) to remember Vietnam or the Moon landings, our generation had never really felt, when watching television news, that we were watching history being made. Summits, terrorism, economic booms and busts came and went. But there had never been anything like this –

**1989, a year when the world changed
and, for the first time in our lifetime,
the map of Europe changed.**

There will, rightly, be many high-profile events to commemorate the 20 years that have passed since our continent could become reunited. At the ACT, we are commemorating something different, but, I hope, not entirely unrelated – 20 years since the definitive arrival of commercial television in Europe.

Television can claim to have played a small role in bringing about that year of momentous political change. Many commentators partly attribute the growing disenchantment of East German citizens with their system to the possibility of receiving West German television – with all its images of political pluralism and consumer choice. One part of the old GDR, where the local topography meant the Western TV signals could not be picked up, was mocked by fellow East Germans as the “Valley of the Clueless” – think of it as a sort of 1980s precursor of the “digital divide”.

We have of course come a long way since 1989. It was not, in the phrase of the time “the end of history” – if anything, political changes have accelerated since then. Many countries we used to think of as “Iron Curtain” states are now normal, democratic Members States of the EU. And the media has also changed beyond recognition. Something else which happened in 1989, before anyone had really heard of Silicon Valley, was that “the World Wide Web” was created in a laboratory in Geneva. By the early-mid 1990s the Internet had become familiar to most of us as a dial-up, text-based information medium, and only in the mid-late 1990s did anyone think of sharing music files online.

Relentless technological advances have brought us to where we are today, where a viewer who misses his favourite TV programme can “catch-up” and watch it on demand via a broadband connection.

This is an important message for the commercial broadcast/media world to remember. Even as we, at the 2nd Annual ACT Conference, look back at the pioneering days of 1989, so we must also keep an eye on the future. There is, too often, a tendency in the television sector to believe in a “better yesterday”, that the programming from 20 or 30 years ago was somehow “better” than today’s. This argument, however distinguished the career of the programme-maker advancing it, misses the point.

There were certainly some excellent programmes made in the 1960s – but to eulogise it as a mythical golden age is to overlook the extraordinary advances that have been made since then: cinematic standard production values, news and sports coverage transformed beyond recognition, but above all, viewer choice.

And, as we move from the world of “broadcasting” to one of “multiplatform distribution of audiovisual content”, two things will remain certain: that the viewer’s control over what to watch, when, and where to watch it, will only continue to increase; and that, for all our discussions about regulations, technology, finance and ownership, the decisive factor in our business is what it has always been: the programmes.

Ross Biggam

V - Interview with Viviane Reding

EU Commissioner for Information Society & Media

1. Commissioner Reding, congratulations on the completion of your 2nd term in office as Commissioner for the Information Society & Media. Looking back, what have been the main issues of discussions over the last five years?

First of all we had an important debate on the **Television Without Frontiers (TVWF)-Directive**, which resulted in the adoption of the **Audiovisual Media Services (AVMS)-Directive**. I am confident that this revised regulatory framework, which Member States have to implement by the end of this year, provides the legal certainty operators need under rapidly changing market and technological conditions. The Directive in a graduated approach covers On-Demand and television services and modernises the rules on television advertising. Both issues were not entirely consensual at the outset.

Another important strand of discussions took place in the context of the **Content Online initiative**. De-materialisation in the distribution of creative content is shaking up the business models of creative industries, with both potential opportunities and potential losses. It is also introducing new players into the media industry landscape. This raises the question of how far it is possible to develop solutions, which promote greater variety and better accessibility of legal offering, whilst protecting the interests of right holders. Part of the Commission's response to these transformations was to launch the "Content Online" initiative. Our aim is twofold: in the short term, to promote pragmatic solutions enhancing the availability of creative content online and ensuring additional revenues for all players in the value chain; in the medium term, to look at a possible need for legislative intervention.

Besides these two headline themes, further discussions were relevant for the media sector: the **reduced Value Added Tax (VAT) rates system** was revised during this period. Some proposals also included some media-related issues, like the VAT rate to be applied by Pay-TV services. Intensive consultations resulted in no adverse changes being introduced. The combination of well-crafted messages coming from outside the Commission and an echo inside the house worked well for VAT.

2. Which topics would you consider to have been your main challenges?

The last five years have been very exciting for TV, which has not only become increasingly enjoyable (High Definition TV - HDTV) but has gone digital (switchover) and mobile, with the arrival of mobile TV on the European market. Content industries and notably the cinema industry have started talking about IPTV and mobile TV as of the 3rd and 4th platform. These points are an important revolution in the way people enjoy audiovisual content. All of my initiatives in the Information and Communication Technologies (ICT), Telecom and Media sectors are aimed at achieving a true Single Market for information society services. This goal can only be reached by the removal of national barriers, not only for businesses but also for consumers, who should be able to access any Information Society service, including mobile TV and Internet Protocol TV (IPTV) across borders.

Compared to the rather smooth adoption of the AVMS-Directive, the **reform of Europe's telecoms rules** proved more challenging, but we are now very close to an agreement. The reform package encompasses more than 160 articles with 750 subparagraphs. Only one subparagraph still remains to be agreed upon between Council and Parliament. This reform will pave the way for better regulation and coordination of telecoms rules in Europe's single market, improve the way radio spectrum is managed in Europe, and strengthen consumer rights as well as the open nature of the Internet. The reform will bring us substantially closer to completing a single European telecoms market.

3. For our sector the revision of the AVMS-Directive has been a milestone and, in particular, in an economically sensitive environment the flexibilisation of advertising rules has been very helpful. Do you believe that the achieved outcome will be workable for the next 10 years?

The TVWF-Directive has been in force for roughly 20 years and has been revised once. So we have a kind of tradition to have a legislative proposal about every 10 years. I think it is a reasonable expectation that the life-span of the new AVMS-Directive – before we need another revision – will also be about the same.

I think the Directive already passed its first test. YouTube did not exist when the Directive was drafted – but the concepts used in the Directive proved to be flexible enough to deal with new services like this and allow for a legal assessment: when no ex-ante editorial responsibility is exercised with regard to platforms for the exchange of User-Generated Content, this is not considered to be an audiovisual media service.

You mention another positive outcome of the revision: **the modernisation of advertising rules**. The AVMS-Directive simplifies the rules and offers more margin of discretion to broadcasters: it suppresses the daily limit of advertising and allows broadcasters more flexibility in their insertions of advertising during programmes. Cinematographic films, films made for television and news programmes remain subject to a specific regime of one advertising break per each scheduled period of 30 minutes. Most importantly, the AVMS-Directive also allows new revenue streams, notably with the regulation it provides for **product placement**, which should allow this practice to be allowed in most Member States. Of course, the final success of this Directive depends on the Member States implementing these measures. But I am optimistic in this respect, because the Member States have agreed unanimously to the text and any stricter measures need to be compatible with the Treaty and all other areas of Community law.

4. Looking at the current market environment, a fair and competitive market with clear rules for our publicly financed competitors is of key importance. How do you evaluate the final text adopted on the 2001 Broadcasting Communication?

The recently adopted **revised Communication on state aid for the funding of public service broadcasters** is a well balanced and meaningful text. It will certainly give additional legal certainty to the media sector in Europe and ensure fair competition between public broadcasting and private media. Surely the most important change in the new Communication is the introduction of the ex-ante control of significant new services launched by public service broadcasters. This means in practice that Member States have to balance the public value of a state-financed offer with its expected market impact, which may be positive or negative. It is my sincere conviction that the test will help maintain media pluralism in the new environment by safeguarding the system of dual broadcasting in difficult times for public and private broadcasters alike.

5. For us as commercial broadcasters the protection of content is of crucial importance to ensure our survival in the future. However, there is a strong voice calling for free content for all. What is your view on this and how would you take action to ensure a pluralistic and creative media environment in the future?

There is no such thing as a “free lunch” and there is also no “free content for all”; but maybe we need **new pricing models**.

In the last 3 months of 2008, less than 5% of Europeans paid for online content. For the youngest age group (16-24), this figure is twice as high. For approximately 30% of them, lower prices would be an incentive to pay. These users are the future and I see their choice to go for illicit sources of content as a vote of no-confidence in existing business models and legal solutions. A key challenge is and will be ensuring both easy access to attractive and affordable digital content for consumers, notably the new generation of “digital natives”, and fair remuneration of creators and intermediaries.

The Commission’s goal is to create the **framework for a genuine Single Market for Creative Content Online**, which offers plenty of opportunities for the growth of creativity online. I would like to convince all the stakeholders involved that new online services require a more dynamic and flexible framework, and request once again their

support to provide a legal offer and, at the same time diverse, attractive and affordable content for consumers. Due to restrictive and complex licensing practices, the market for digital content is still fragmented and broadcasters and consumers are prevented from benefiting from a true digital Single Market.

We need to promote pan-European availability of programmes compatible with the business models of content producers and distributors. In this context we have mandated a study on **multi-territory licensing of audiovisual content**, which should be available at the beginning of 2010. The study will analyse the potential for cross-border distribution of audiovisual content, the main challenges for the development of a multi-territory distribution business model and its economic and cultural consequences.

Consumers want to have access to a wide choice of audiovisual content whenever they want and from wherever they are. This requires easier and quicker rights clearance structures for commercial users, facilitating the provision of multi-territory services. Easier access to creative content will boost innovative business models that use the possibilities offered by digital technologies. Consultations with all interested stakeholders are ongoing and we hope that an improvement in the situation will be possible in the near future.

One word on **media pluralism**. The changing structure of the media and deteriorating economic conditions are indeed a reason for concern. In this context I initiated with my colleague, Mrs Wallström, a 3-step approach, which includes a study entrusted to an external consortium. The primary aim of this study is to define and test concrete, objective indicators for assessing media pluralism in the Member States. Its ultimate goals are to achieve comparability, enable regular monitoring to track developments and identify constraints. The study brings together, for the first time, indicators covering legal, economic and socio-demographic domains, relating to various risk areas. The study was presented in spring 2009. I hope that there will be wide use of the indicators.

6. In your view, what are the main challenges lying ahead for a new European Commission and which do you see in the field of media policy?

The biggest challenge for the next European Commission will be to work effectively to accelerate the recovery from the **world economic downturn**. Information and communication technologies, including media, will play a crucial role in this process as a source of productivity, innovation and growth.

The recently published **Europe’s Digital Competitiveness report** showed that most of the IPTV services available in Europe are restricted to users resident in certain countries; only a minority are open to a supra-national audience. The removal of territorial barriers for these services would also benefit advertisers and commercial televisions, which would be able to reach wider audiences. 20% of EU citizens used the Internet in the last 3 months to watch web television and/or listening to web radios and I believe that this rate will grow steadily in the coming years.

We are already looking today at the strategic priorities for the medium term. With other regions of the world becoming ever more competitive, Europe has to change and adjust to the evolving new technical and market conditions. High speed Internet requires high interest content and attractive services for the end-consumer. A sound framework, combining the strength of market forces with a single-market-wide level regulatory playing field, appears to be the best answer that Europe can give. To this end, the Commission decided to open a broad consultation on our Digital Europe Strategy in August 2009. As I see it, there are four priority areas for Digital Europe where EU action appears to be most needed. Three of them are not directly linked to the field of media policy: first, preparing for **a safe and consumer-friendly European space for mobile payments**; second, **opening up Europe’s digital economy to small businesses**; and third, **making better use of innovative ICT solutions to meet our objectives of a low-carbon economy**. The fourth one is the issue that I already mentioned: we have to make it easier and more attractive to **access digital content**, wherever it is produced in Europe. Digital Europe can only be built with content creators on board and with the generation of digital natives as interested users and innovative consumers.

VI BUSINESS MODELS TODAY & TOMORROW



FCGB (©Cyril Plotnikoff M6)

In the old days it was rather simple – there were two ways of raising revenues commercial broadcasters needed to reinvest in programming: on the one hand **Free-to-air (FTA) broadcasters** generated revenues from advertising, which they reinvested in programming; on the other hand there were **Pay-TV operators** generating income from subscriptions.

In the light of technological change, however, with new competitors entering the market and the economic crisis particularly affecting FTA players with advertising revenues going down, we see an **ongoing adaptation of our business models**. Our members are transforming from **broadcast-only players into multimedia platform operators**. Whether that accounts for large European media groups such as RTL Group, ProSiebenSat.1 Group, Central European Media Enterprises (CME) or Modern Times Group (MTG), large national channels like Mediaset and BSkyB, or smaller national channels like TV3 or TVI, all over Europe we see similar trends:

- Diversification of revenues
- The launch of new platforms and channels
- FTA players launching Pay-TV services and vice versa
- More and more multimedia activities and Internet-based audiovisual services

Innovation happens daily with catch-up TV, mobile TV, IPTV, HDTV and even 3D-TV being launched and developed all over Europe.

VI.1 Free-to-air Channels & Pay-TV Operators

COMMERCIAL BROADCASTERS ARE OPERATING UNDER DIFFICULT ECONOMIC CONDITIONS. THOUGH THERE ARE SIGNS THAT THE WORST IS OVER, THE GLOBAL ECONOMIC CRISIS HAS RESULTED IN A DOUBLE-DIGIT DECLINE IN TELEVISION ADVERTISING REVENUES IN ALMOST ALL EUROPEAN MARKETS. PAY-TV SEEMS TO BE MORE RESILIENT TO THE CRISIS, HOWEVER, AT LEAST IN SOME MARKETS. DESPITE THIS ECONOMICALLY CHALLENGING ENVIRONMENT, THERE IS GREAT ACTIVITY AMONG BOTH FTA AND PAY-TV CHANNELS WITH NEW CHANNELS BEING LAUNCHED, NEW PLATFORMS BEING ACCESSED AND NEW CONTENT BEING OFFERED.



FTA and Pay-TV > France



M6: Launch of a new DTT Channel

Launched three and a half years ago by M6 Group, **W9** has quickly become the top DTT channel among the under fifties. With an average audience of 21.4 million viewers every week, W9 complements the M6 channel superbly. The diversity of its programmes and the eclectic mix of its presenters have made W9 a channel which is watched by the whole family and which increasingly complements its older sibling.



TF1: Expansion of its FTA and Pay-TV offer

In 2008, viewers' choice was wider than ever. 78% of French people could access more than 15 channels via DTT, cable, satellite and ADSL. TF1 is present on DTT through **TMC**, which is the leading DTT channel, firmly installed as the 7th ranking national channel thanks to its unique positioning as a general-interest, family-oriented entertainment channel. 2008 was a record year for TMC, with a national audience share of 2.1% (Médiamétrie 2008). With a 4.2% share of the DTT audience, TMC is the 5th French DTT channel, coming before France 5, Canal+, Arte and all other DTT channels. TMC also holds the DTT audience record, with 1.4 million viewers tuning in to watch the film *Allo, Maman ici Bébé*, as well as achieving 7 of the 10 biggest DTT audiences of the year.

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In the **Pay-TV sector** TF1 Group is present through cable, satellite, ADSL and/or DTT with: **LCI** (news channel); **Série Club** (TV series); **Ushuaïa TV** (sustainable development channel); **Histoire** (history channel); **Odyssée** (lifestyle channel); **TV Breizh** (general interest channel); **TF6** (entertainment and series) and the **Eurosport** channels.

Eurosport covers around 100 sports as well as major international sporting events. A wholly-owned subsidiary of TF1, the Eurosport Group is the leading European multimedia sports platform. Eurosport International is received by more than 117 million households with pay and free service. The channel is carried in 20 languages in 59 countries. Eurosport launched the complementary channel, **Eurosport 2** that extends the pan-European sports channel offering with a large portfolio of live broadcasting rights, magazines and non-stop sports news flashes. One of the brands is also the sports news channel, **Eurosport News**, entrenched for the long haul outside Europe (South Africa, India, Malaysia, Australia, New-Zealand) and distributed in Europe to households, almost all of them paying subscribers. Finally, in 2008, Eurosport launched its latest channel - **Eurosport HD** - available in more than 26 countries.



Ushuaïa TV - Nicolas Hulot



FTA and Pay-TV > Germany - Austria



Sky Deutschland: Launching new Pay-TV services in Germany & Austria

Sky successfully launched its new TV entertainment service in **Germany and Austria** on 4 July 2009. It provides great value for subscribers with a larger variety of quality channels, the best blockbuster and movie selection available on German TV, the most comprehensive football and sports offer, a compelling offer to family and kids and the **first comprehensive HDTV offer** in Germany and Austria. The new service is targeted to build a successful Pay-TV business and to reach profitability by growing the number of monthly contract subscribers and increasing their average revenue. Sky expects to be net income and cash flow positive from the year 2011 onwards.

- The enhanced programming offer comprises up to 40 general entertainment channels and a great movie line-up. The new Sky Film package offers 10 channels, showing 80 movies a day and approximately 25 blockbuster first releases every month, aired for the first time in German language. Sky also offers the most comprehensive sports packages in Germany and Austria and is the true home for all football fans: live matches of the Bundesliga, the DFB Cup, the UEFA Champions League, and top sport events like the UEFA Europa League, international football, Formula 1, golf, hockey, tennis, and the FIFA 2010 World Cup.
- A clear and simple packaging and pricing is guaranteed through a buy-through model where all subscribers first access the package Sky Welt, and then have access to additional premium packages.
- The usability and convenience of the service will be improved. Sky designed the channels around genres that viewers want to see, implemented a convenient movie scheduling system and introduced clear channel names such as "Sky Action" or "Sky Emotion". Flexible scheduling with time-shifted start times as well as multiple replays gives subscribers flexibility to watch movies when they want. Sky will introduce user-friendly electronic programme guides.

A strong selling point for the new service offer by Sky Deutschland, is **Sky HD**, the first comprehensive HD package in Germany and Austria. So far, there has been no comprehensive HD service available for TV households in Germany and Austria. Currently seven high-quality HD channels give viewers an outstanding TV experience with top-flight live sports, blockbuster movies and breathtaking documentaries.

"Sky successfully launched its new TV entertainment service in Germany and Austria on 4 July 2009"



FTA and Pay-TV > Luxembourg - Europe



RTL Group: Leading European entertainment network offering FTA television in 11 countries

With **46 television channels and 30 radio stations in 11 countries**, RTL Group is the leading European entertainment network. Each day, over 200 million viewers watch the TV channels of **Europe's largest commercial broadcaster**. The Group's content production arm, **FremantleMedia**, is one of the largest international producers outside the US. Each year it produces 10,000 hours of award-winning primetime programming across 57 countries. The philosophy of RTL Group is one of **decentralisation**. Each RTL Group profit centre is led by its own CEO. This allows each CEO to be an entrepreneur and act quickly and flexibly in his or her local market. They enjoy considerable independence and bear full responsibility for the performance of their companies. In terms of programming, diversity is at the very heart of RTL Group. The Group's families of channels and TV production companies offer their audiences the broadest possible spectrum of entertainment and information – programmes for the whole family, for young and old, for female and male target groups.

"With 46 television channels and 30 radio stations in 11 countries, RTL Group is the leading European entertainment network"

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FTA and Pay-TV > United Kingdom



BSkyB: Leading Pay-TV operator in the UK & Ireland in 9.442 million households

Sky operates the most comprehensive multi-channel television service in the UK and Ireland. **Over 9.442 million households** enjoy an unprecedented choice of movies, news, entertainment and sports channels and interactive services on Sky digital. Customers can choose from six basic subscription packs – News & Events, Music, Style & Culture, Kids and Knowledge – as well as premium sports and movies options. The Sky TV packages offer **access to over 500 television and radio channels**. In addition to the choice of Sky TV channels, all customers can receive **more than 330** Free-to-air television and radio channels and services. Interactive functionality is also available to all customers, as is access to Sky's popular electronic programme guide, Sky Guide.

“The Sky TV packages offer access to over 500 television and radio channels”



MTV Networks International: Launching a new 24-hour HDTV channel

MTV Networks High Definition (MTVNHD) is a 24-hour English language channel consisting of original programming, acquired and from MTVNI's multi-branded library. Over 300 hours of original programming have been commissioned for the international channel, offering a broad range of music content including iconic series such as *MTV Unplugged* and *VH1 Storytellers*, as well as high-profile live music events including *Isle of MTV*, *Roskilde*, the *MTV Video Music Awards* and the *MTV Europe Music Awards*. In addition, a Nickelodeon programming block, broadcasting on Saturday and Sunday mornings, plays host to the network's stable of hit shows such as *SpongeBob SquarePants*, *Avatar: The Legend of Aang*, *Jimmy Neutron: Boy Genius*, *Tak & the Power of Juju* and *Mr. Meaty*.



FTA and Pay-TV > Italy



Mediaset: Launch of new channels & expanding from FTA into Pay-TV

FTA transmissions are the traditional core business of the Italian commercial broadcaster Mediaset. R.T.I manages Mediaset's FTA channels - **Canale 5**, **Italia 1** and **Retequattro**. The traditional offer is now complemented by 3 new channels broadcast on DTT: **Boing** (in partnership with Turner Broadcasting System Europe, Time Warner Group); **Iris** and **MediaShopping**.

Launched on the digital terrestrial platform in 2005, **Mediaset Premium** is a Pay-TV service that is accessed either by a pre-paid card or with a new method of payment by credit card called "Easypay". Mediaset Premium's offer includes:

- **Gallery:** Launched in 2008 and based on a three themed world – Joi, Mya and Steel – with exclusive previews of the best TV series and films from Time Warner and NBC-Universal
- **Disney Channel and Premium Calcio 24:** Launched in July 2008 focusing on 24 hours of football
- **Premium Fantasy for children and teenagers:** Launched at the end of 2008 and including the Disney Channel, Playhouse Disney, Cartoon Network and Hiro
- **Premium Cinema and Studio Universal:** Launched in May 2009 and offering high-quality cinema
- A 24-hour offer fully dedicated to reality shows running on the Group's Free-to-air networks



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FTA and Pay-TV > Poland



TVN Group: Focus on thematic channels, the Internet and Pay-TV

The Polish TVN Group has a wide range of channels, including a great focus on thematic channels, and today owns and operates eleven television channels:

- **TVN:** Principal FTA channel
- **TVN7:** Entertainment channel
- **TVN24 channel:** First 24-hour news and current affairs TV channel
- **TVN CNBC Biznes:** Business news channel
- **TVN Meteo:** Poland's first weather channel
- **TVN Turbo:** Poland's first thematic channel aimed at men
- **TVN Style:** Channel focused on life styles, health and beauty for women
- **ITVN:** Targeting viewers of Polish origin living abroad
- **Telezakupy Mango:** Only, all day, teleshopping channel in Poland
- **NTL:** Local TV channel
- **TVN Warszawa:** Newly launched local TV channel

The newly-launched channel **TVN Warszawa** is an up-to-date local channel dedicated to Warsaw and its residents. TVN Warszawa focuses on life in Poland's capital, providing daily breaking news, updates on cultural events and recreation time ideas. The TVN Warszawa channel is available on digital platforms and cable operators and available online at www.tvnwarszawa.pl

Owned by TVN Group, "**n**" platform is Poland's most advanced Pay-TV platform, combining a unique programme line-up with the latest technology. Being a technological leader, it has mapped out the direction of Poland's TV development since its very beginning by introducing new services and functionalities, such as PVR, VOD and portals available via decoder. For its Set Top Boxes **n** uses the latest technology and is Poland's first platform to offer HDTV broadcasts. The programme offer is grouped into **seven thematic packages**: news & entertainment; style, fashion & music; children; Cinemax; sport & cars; culture, science & world; and film hits.

Some of the channels available within **n**'s packages are new to Poland such as: **Discovery Historia** (documentary channel offering an innovative approach to historical subjects); **Discovery HD** (the only global HDTV network); **War and Peace** (channel featuring current and classic Russian cinema); and **nsport** (Poland's first 24-hour sport channel transmitted entirely in a HD system).

"TVN Group has a wide range of channels, including a great focus on thematic channels, and today owns and operates eleven television channels"



FTA and Pay-TV > Belgium



RTL Belgium: Successful relaunch of an FTA channel

Plug TV, RTL Belgium's channel targeted at a 15 to 34-year-old audience, was renamed **Plug RTL** at the start of September 2008. The relaunch aimed to emphasise the channel's ties to the Belgian RTL family and to entice viewers to (re)discover the channel. The channel's prime time audience share in its key target group increased from 3.7% in 2007 to 4.4% in 2008. This improvement was clearly driven by the successful relaunch, as the channel increased its audience share every month from September 2008 (3.2%) to December 2008 (6.2%). The channel's flagship formats include popular entertainment programmes from M6 such as *D&Co*, *Pékin Express* and *Nouvelle Star*, plus repeats of hit US series such as *CSI: Miami*, *Lost* and *Heroes*. In the first half of 2009, the success story continued as Plug RTL's prime time audience share among young viewers increased to 5.4%, compared to 3.8% during the first six months of 2008.

"The channel's prime time audience share in its key target group increased from 3.7% in 2007 to 4.4% in 2008"



Vtma: Engaging with kids - launch of a new children channel

VtmKzoom is a new television channel for children between 2 and 12 year-olds, bringing great TV for kids from 6 am until 7.45 pm. The channel offers a large variety of animation and live-action programmes that even parents and grandparents will enjoy. Kzoom also has its own news update for kids, zoomJr; because children are also interested in what happens in the world around them.



FTA and Pay-TV > Denmark



ProSiebenSat.1 Group: Launch of a new FTA channel in Denmark

6'eren was launched on 1 January 2009. 6'eren is distributed via terrestrial, cable and satellite distribution. 6'eren is a channel aimed at male viewers, focusing on themes and theme days such as: *Friday Fight Night*, *Men & Motor* and *Sci-Fi Sunday*. The channel appeals to the modern man, and ranges from science investigation programmes to award-winning drama series as well as high-octane shows. A wide range of sports events will also feature on 6'eren, such as football from the English FA Cup and the Spanish La Liga.

"6'eren is a channel aimed at male viewers"

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FTA and Pay-TV > Sweden



TV4: Revenue diversification with FTA, (mini)-Pay channels and Pay-TV

TV4 is Sweden's largest TV channel in the commercial target group of 12-59 year-olds, a status it has earned thanks to the well conceived variety of its schedule. Major international entertainment formats are complemented by in-house-produced comedy shows; the most popular American series rub shoulders with domestic drama productions; and serious social commentaries from news and current affairs programmes exist side-by-side with well informed sports journalism and top sporting events. In addition, *Nyhetsmorgon* is Sweden's only breakfast show broadcast 365 days a year. TV4 also broadcasts local news programmes from 25 strategically located news centres around the country. In other words, the TV4 Group is very much part of Sweden, in terms of both content and geography.

Apart from TV4, the Swedish TV4 Group's channel portfolio comprises:

- **TV Plus, TV4 Film, TV 400, TV4 Fakta, TV4 Guld, TV4 Komedi, TV4 Sport, and TV4 Science Fiction**
- **25 local TV stations**
- **The HD channel TV4 HD**
- Four Finnish TV channels: **MTV3 Sarja, MTV3 Scifi, MTV3 Fakta** and **Sub Leffa**; all of them being basic cable (mini-pay) channels, some of them carrying advertising

In 2008, the TV4 Group acquired **C More Entertainment/Canal+**, the Nordic region's leading premium Pay-TV company, with operations in Sweden, Denmark, Finland and Norway. Its programme portfolio contains blockbuster films, series and sports on several channels. Almost a million households in the Nordic region have chosen Canal+ in their channel packages. In addition to its linear TV channels, Canal+ offers Pay-per-View and VOD services both on the Internet and through various distributors. Altogether, there are a total of 30 channels in the TV4 Group portfolio.

“TV4 is Sweden's largest TV channel in the commercial target group of 12-59 year-olds”



FTA and Pay-TV > Czech Republic - Europe



CME: Leading FTA channels in Central and Eastern Europe

Central European Media Enterprises (CME) is the leading television broadcaster in Central and Eastern Europe. CME has been operating as an FTA broadcaster for fifteen years in Central and Eastern Europe and currently operates 18 channels in seven markets. CME's multichannel strategy and high-quality local content production have both contributed to the success of the business. In 2009, CME's revenues from its broadcast operations were more than US\$ 1 billion. Recently, CME has also developed web-based assets and announced plans to diversify its revenues further.

“CME operates 18 channels in seven markets in Central and Eastern Europe”



FTA and Pay-TV > Bulgaria



bTV: Launch of two new cable channels in 2010

The Bulgarian broadcaster bTV started working on its multichannel platform in 2009. By the end of 2010, bTV will come up with two new cable channels.

“bTV will come up with two new cable channels”

VI.2 Diversification

IN ORDER TO RESPOND TO TECHNOLOGICAL CHANGE AND THE ECONOMIC SITUATION, DIVERSIFICATION HAS BECOME OF EVER GREATER IMPORTANCE FOR COMMERCIAL BROADCASTERS. WHILE REVENUE STREAMS ARE BEING DIVERSIFIED WITH FTA GROUPS INTRODUCING PAY-TV SERVICES AND NEW PLATFORMS AND CHANNELS BEING LAUNCHED, WE ALSO SEE OTHER FORMS OF DIVERSIFICATION SUCH AS INTERNATIONALISATION AND ENGAGEMENT IN THE FILM, SPORTS AND MUSIC INDUSTRIES.



Diversification > France



Canal+: Going global and investing in films & sports

The French Pay-TV operator Canal+ takes a wide range of actions to diversify its businesses, ranging from internationalisation of its business to strengthening its activities in the film industry and extending its activities in the field of sports.

- **The Canal+ Group internationally:** Canal Overseas, a wholly-owned subsidiary of Canal+ France, is the operator of Canal+ and CanalSat in the French overseas territories and departments and in sub-Saharan Africa. The only French overseas network, Canal Overseas operates four satellite platforms (Africa, Caribbean, Indian Ocean and Pacific) covering a potential worldwide audience of 500 million individuals and two-thirds of all French-speaking territories. At year-end 2008, Canal Overseas had one million active individual subscribers in French overseas territories and departments and in Africa.
- **Studio Canal, a major player in the film industry:** Studio Canal, a wholly-owned subsidiary of Canal+ Group, is the European leader in the production, acquisition and distribution of motion pictures in all media: theatre, video, audiovisual and VOD. Studio Canal has a catalogue of over 5,000 French, British and American films. Alongside Canal+, Studio Canal is a key partner of French cinema, helping to finance two-thirds of all films produced in France each year. Studio Canal operates in the UK (through its subsidiary Optimum Releasing) and Germany (through its subsidiary Kinowelt, acquired in January 2008).
- **Stronger presence in the world of sports:** Early in 2008, the Canal+ Group acquired Occade Sport, now called **Canal+ Events**, specialised in organising sports events. The goal is to strengthen its presence in the sports world and to develop its sports events production activities. Canal+ Events organises, among others, the Lyon (France) Tennis Grand Prix, the Masters France tennis tournament, the Lyon marathon, Saint-Nom-la-Bretèche (France) golf trophy, and VIP operations for the French Open at Roland-Garros.

“Canal+ takes a wide range of actions to diversify its businesses, ranging from internationalisation of its business to strengthening its activities in the film industry and extending its activities in the field of sports”



M6: focus on film distribution and football

Through its subsidiaries **SND, SNC, Mandarin, Mandarin Films, Hugo Films** and **TCM** (50% share holdings), the M6 Group manages box office screening rights and an impressive catalogue of box office films and audiovisual works. In 2008, films distributed by SND accounted for 7.8 million tickets sold, up 34% on 2007. *Iron Man* contributed greatly to this success with more than 2 million admissions. The same film ensured M6 Video achieved first place for Blu-Ray sales in 2008. On the back of this record year, SND is now the 9th leading French film distributor and the start of 2009 has been encouraging: the film *Twilight*, released in January 2009, is the first major film released since the M6 Group acquired a stake in the production company Summit Entertainment in 2007.



FCGB (©Cyril Plotnikoff)

- Over its 127-year history, the **Girondins de Bordeaux Football Club** has become one of France's leading clubs. The Club won the League for the 2008-2009 season. This very strong season crowns the success of the dual management team led by the former international player Laurent Blanc and a great team of international players. The Club has long focused on the excellence of its training centre, which is recognised as France's number 2 football training centre by the French Football Federation.



TF1: Successful launch of subsidiaries

TF1 has created a number of subsidiaries that have based their growth on the strength of the TF1 channel and built their success through their own initiatives and innovation. TF1 Entreprises brings together four major businesses in the areas of publishing and merchandising:

- *TF1 Licences* markets the brand licences, designs and distributes derivative products linked to shows and events
- *TF1 Games/Dujardin* publishes board games derived from television shows, from original concepts or major brands in the range
- *TF1 Musique* develops disc projects from music operations, brands or characters whose rights it owns. *Une Musique*, a subsidiary of TF1 Entreprises, develops and produces music for television programmes and feature films
- *TF1 Publishing* publishes books under the Toucan label, magazines and youth literature, comic books, prestige books and novelised television fiction dramas



Diversification > Germany



ProSiebenSat.1 Group: Investment in music and programme distribution

Thanks to its diversification strategy, ProSiebenSat.1 Group is able to expand its value chain and thus can open new markets and new revenue sources, which makes the Group less dependent on the currently challenging situation in the advertising market:

- **Starwatch Music and WE LOVE MUSIC:** Starwatch Music is the first German label to combine the emotional reach of television with music expertise. Created by MM MerchandisingMedia and Warner Music, it is a wholly-owned subsidiary of MM MerchandisingMedia, the ProSiebenSat.1 Group's licensing division and music competence centre. Artists such as the "Popstars"-Band Monroe, are developed into potential stars, merchandised and supported with the Group's own programmes. By now, Starwatch Music also contracts external popular artists such as Udo Lindenberg, or Chris de Burgh. In cooperation with MM MerchandisingMedia, Starwatch has launched a new project, a music portal financed by fans: SellaBand.de, on which fans can support their favourite band by buying shares. The winning band - reaching 5000 shares - wins a professional production of an album. New labels were created in cooperation with several music companies on a project-basis, e.g. WE LOVE MUSIC (Universal Music). www.starwatch.de

- **SevenOne International:** Worldwide programming distribution company of the ProSiebenSat.1 Group. It offers a comprehensive portfolio of TV events, mini-series, TV movies, telenovelas, prime-time series, magazines and entertainment formats. It also markets programmes from third parties and won several awards. The range and variety of its programme is ensured by commissioned productions for its in-house broadcasting systems and cooperative ventures with a wide array of independent producers. SevenOne International focuses on TV and video sales and their ancillary rights in the European, Asian, and North and South American markets. Besides established European markets, SevenOne International also aims at expanding to China and Eastern Europe. In addition to productions commissioned by the ProSiebenSat.1 Group's own stations, SevenOne International plays an increasing role as an investor, using its own capital to finance major international events. www.sevenoneinternational.com



SevenOne International - Jens Richter



RTL Group: Super RTL – From TV channel to marketing agent

Active in various kinds of media, **Super RTL** is a prime example of successful diversification within RTL Group. The channel, which has been the market-leader in German children's programming for 11 consecutive years, currently generates 25% to 30% of its revenue from off-air businesses. Examples for Super RTL's diversification strategy are the paid-content websites Toggolino-Club.de and Toggo-Clever-Club.de which lead children playfully into the online realm. In addition to that, Super RTL launched Mamily.de, a social networking site for mothers. Once a year, Super RTL's presenters and many of the channel's cartoon heroes set out on the Toggo Tour – this 'Super RTL roadshow' offers children exciting games, fun imaginative worlds and plenty of stars up close. At the same time, Super RTL distributes magazines based on the different series and issues licenses for toys, candies and similar products for a young target group based on popular series such as *Bob the Builder* or *Hannah Montana*.

“Super RTL is a prime example of successful diversification within RTL Group”



Diversification > Italy



Mediaset: Multiplatform distribution

As network operator Mediaset manages the transmission nets for the analogue and digital signal and also for TV on mobile phones in DVB-H. Moreover, Group's subsidy, Digitalia'08, runs advertising sales for non-television media activities, value added telephone and computer services (Interactive Media), teleshopping (Mediashopping), music (R.T.I Music), publishing products, licensing and merchandising and management of movie theatres.

“Mediaset manages the transmission nets for the analogue and digital signal”



Diversification > Finland



MTV MEDIA: Pay-TV and Internet sites

The Finnish broadcasting group MTV MEDIA Finland has diversified its business activities in several fields:

- **CANAL+:** MTV Oy and C MORE Entertainment AB have entered into an agreement under which MTV MEDIA represents the functions of CANAL + / C MORE Entertainment in Finland, covering distribution, sales and marketing. The agreement increased the selection of MTV MEDIA's pay-TV channels by 10 channels.



- **The home and property service site Jokakoti.fi**
- **Studio 55:** At the beginning of 2009 MTV MEDIA introduced Studio 55, a media phenomenon targeted at the 55+ age group. Studio55 consists of TV, online and online radio components under the theme “room for adult ideas”.
- **MTV3 Katsomo online Catch-up service:** March 2009 saw a major step for the MTV3 Catch-up facility as the service was revamped, with both viewers and advertisers now enjoying access to even higher-quality and more diverse provision of moving image on the Internet. At the core of the service provision are TV programmes, but the selection will see a constant increase in web-only material too. MTV3 Katsomo features both free and paid-for content.
- **GoFinland:** MTV3's travel portal, GoFinland.fi, was revamped in June 2009, with the service now providing the opportunity to make online bookings for hotels and holiday homes around Finland.



Diversification > Czech Republic - Europe



CME: Investing in broadcasting, content and the Internet

In February 2009, CME announced its plans to diversify revenues further. The company intends to restructure into three divisions – broadcasting, content and Internet. In addition to its existing lines of business, it sees the opportunity to generate additional revenues by providing management services to owners of channels outside of its own markets. CME also plans to optimise revenues by exporting its own-produced programming to other markets in Central and Eastern Europe, replicating a strategy it already employs successfully in its own adjacent markets. In 2008, CME's stations produced over 2000 hours of fiction series programming, providing significant potential to create additional revenues.



“The company intends to restructure into three divisions – broadcasting, content and Internet”



VI.3 New Media Platforms

NEW SERVICES ARE CONSTANTLY BEING LAUNCHED: CATCH-UP TV, VOD, NEW WEBSITES AND INTERACTIVE PLATFORMS, MOBILE TV, HDTV AND TOMORROW'S 3D – WITH THE END NOT IN SIGHT. THE CONSUMER AND HIS BEHAVIOUR ARE AT THE CENTRE OF THESE ACTIVITIES AND THE AIM IS TO ENGAGE AND INTERACT WITH HIM AS EASILY AND FLEXIBLY AS POSSIBLE. IT IS A LEARNING PROCESS BOTH FOR CONSUMERS WHEN DEALING WITH NEW SERVICES, BUT ALSO FOR COMMERCIAL BROADCASTERS WHEN INVESTING IN THEM.



New media platforms > France



Canal+: Catch-up TV and Video-On-Demand

The leading Pay-TV channel in France and a pioneer of digital in Europe, the Canal+ Group is the leader in new uses of television. Beyond the HD revolution, in which it is in the vanguard, the Canal+ Group is at the leading edge of television On Demand with its Catch-up TV offerings, Canal+ and CanalSat On Demand. It also operates the first legal downloading service in France, **CanalPlay**. *The Canal+ key*, a pocket set-top box in USB format for watching Canal+ wherever viewers go, and *+Le Cube*, a hard-drive-equipped set-top box with advanced functionalities, are among the Canal+ Group's latest innovations.



+Le Cube



M6: Partnership with Orange to go mobile

The number of **M6 Mobile** by Orange subscribers significantly increased in 2008. The service's 1.5 million customers are testament to the success of the partnership M6 has built with Orange. M6 Mobile is the leading alternative telephone brand among 15-25 year olds. M6 Mobile also continued to innovate by launching the first 3G+ key in 2008 aimed at young people. The service provides Internet access, comes with 2 inclusive hours for browsing the web and has no subscription obligation. The M6 Group this year launched Catch-up television on the Internet (subsequently on broadband DSL TV and on Orange mobile). **M6 Replay** allows viewers to watch M6 channel's leading programmes just a few hours after they have been broadcast. The results quickly exceeded the targets with the number of people visiting the site reaching 1.9 million and 10 million being watched each month.





TF1: Orchestrating all its Web activities

The objective of the new media department of TF1 is to orchestrate the Group's activities on the Web, mobile phone, television via ADSL (IPTV) and emerging media. Its mission is to underscore TF1's offering on all new media. As France's first Internet media group, in 2008, the TF1 Group reaches one out of every two Internet users.

TF1's excellent Internet performance is a result of its wide-ranging selection of news and entertainment websites, perfectly in tune with Internet users' preferences:

- The general interest portal **tf1.fr**, including detailed information about the channel's programmes, news information and Catch-up TV
- An enhanced video offering on the Catch-up service WAT
- Online games based on TF1 game shows (such as *Qui veut gagner des millions?*)
- Websites focusing on the Group's main broadcasting arms, such as **TFou.fr** (younger viewers), **LCl.fr** (news), **eurosport.fr** (sport)
- Complementary thematic websites such as: **automoto.fr**; **dvdrama.com**; **plurielles.fr** (portal for women); **ushuaia.com**; and **www.over-blog.com** (Web 2.0 and the interactive, community Internet).



WAT



- **The Netherlands: RTL Gemist** is a free service offering Catch-up TV highlights of the past week. In the first half of 2009, the number of video views almost doubled to 87 million. The most popular streams were episodes of the daily soap *Goede Tijden, Slechte Tijden*, the entertainment news show *RTL Boulevard* and clips from the *RTL Nieuws* website. The service will soon also be available on TV screens, following an agreement with cable operator UPC Nederland.



New media platforms > Germany - Europe



ProSiebenSat.1. Group: Investing in the Internet

Thanks to the online video portal **MyVideo**, the ProSiebenSat.1 Group extends the reach of its content on the Internet – and across Europe. MyVideo has first been launched in Germany and is now available in several European countries. It offers Blockbusters, premium TV content, music clips, exclusive Web TV-Productions, and User-Generated Content. MyVideo also promotes young talents. In a special cooperation with ProSieben, users were able to vote for their favourite newcomer talents in three categories: MusicStar, DanceStar and AllStar. The most voted talents are then presented in the weekly ProSieben show *MyVideo Star*.

Along with ProSieben and Universal Music, MyVideo invites its users to shoot their own videos for the new U2 single. The winner clip is the first fan-made video in the band's history ever. The best clips were presented in the ProSieben show *Taff*. Furthermore, MyVideo collaborates with social networks in Germany, allowing users to user share clips with their friends. www.sevenoneintermedia.de



New media platforms > Luxembourg - Europe



RTL Group: Any time, any place, anywhere

Digitisation is changing the way people watch TV – and in particular increasing the power of viewers to watch what they want, when they want. The lion's share of VOD is currently the Catch-up service – where broadcast shows become available free online for a certain period of time once they have been shown on regular television screens. As the take-up from viewers grows, so will the interest from advertisers – after all, it is the same 'eyeballs' online as for the traditional TV broadcast, and usage patterns show that viewers are accepting advertising as a normal part of their online viewing experience.

- **Germany: RTL Now** is the prime Catch-up service and generates 11 million views of complete episodes of shows or series each month. There is an extensive programme guide by format, alphabetically or by time of broadcast, and new shows are added as soon as they have aired. There is also a successful pre-TV screening pay offering, for example for the popular daily soap *Gute Zeiten, Schlechte Zeiten*. On 1 July 2009, Vox and RTL Interactive launched a similar service called **Vox Now**.

“Digitisation is changing the way people watch TV – and in particular increasing the power of viewers to watch what they want, when they want”



New media platforms > United Kingdom



BSkyB: Leader in innovation

Since the launch of BSkyB in 1989, Sky has led the way with a number of innovations. Sky was the first to go “digital”, the first to offer interactive “red button” services, the first to offer an integrated PVR, and the first to offer HD services across the UK. Its broadband download service, **Sky Player**, allows customers to access a wide choice of programmes on their PC, while Sky Mobile TV lets them enjoy our content wherever they are. More recently, Sky has expanded into communications with the launch of **Sky Broadband** and **Sky Talk** – great value services available only to Sky TV customers. And Sky is now making HDTV available to everyone by making **Sky+HD**, the UK’s leading HD service, even more accessible. This service has increased to 1.313 million subscribers following record growth.

As next step Sky announced the launch of the **UK’s first 3D channel in 2010**. The channel will offer a broad selection of the best available 3D programming, which is expected to include movies, entertainment and sport.

“Since the launch of BSkyB in 1989, Sky has led the way with a number of innovations”



New media platforms > Italy



Mediaset: great variety of content online

R.T.I Interactive Media produces content for different platforms (Internet, teletext, telecommunication). Its main areas of interest on the web are:

- Mediaset’s corporate website: www.mediaset.it
- News: www.tg5.it; www.studioaperto.it; www.tgfin.it (Mediaset’s economic and financial portal); www.tg4.it; and www.tgcom.it (Mediaset’s news portal on politics, economy, world)
- Sport (launched in March 2008): www.sportmediaset.it.
- Films & TV-productions from Mediaset – VOD service: www.rivideo.it

R.T.I. Interactive Media also develops innovative content and services for mobile phone operators.

“R.T.I Interactive Media produces content for different platforms”



New media platforms > Poland



TVN: Online, interactivity and multimedia as main diversification tools

There are several websites, through which the TVN Group is active in the field of interactivity:

- Onet.pl** - Poland’s leading online portal and first multi-platform hosting over 200 different thematic services. **Onet.pl** is the most popular multimedia portal in Poland and is a pioneer in revenue diversification. Next to its marketing generated income, **Onet.pl** derives revenues from services provided exclusively to its users such as auction fees, subscription fees and fees for dating services, paid thematic services, email hosting, Internet domains trading as well as Internet access fees and telecommunication services (e.g. OnetSkype). Since 2000 **Onet.pl** has been the consistent leader in Polish web portal popularity rankings and the leader of the domestic Internet advertising market. Its brand is the strongest and most recognisable trademark among Polish web portals. Prizes and leading rankings reinforce this status. **Onet.pl** aims at making media users find content as engaging and impressive as possible - regardless of time, place and manner.
- TVN24.pl**: This portal has been created in March 2007 and is the most developed information website in Poland providing extended local and worldwide news, photos and video coverage on business, sport, culture, and the weather. Thanks to the cooperation with the TVN 24 news channel and its own content creation **TVN24.pl** is the fastest and most reliable online information service in Poland. In May 2009 **TVN24.pl** recorded 2.4 million active users. **TVN24.pl** received a number of awards including the prestigious *Dariusz Fikus Award* for the “creation of a user-friendly Internet service”.
- Plejada.pl**: An interactive multimedia site dedicated to show business. It is the first project on the Polish market available immediately on launch via three platforms – Internet, mobile phones and “n” platform.



New media platforms > Belgium



VMMa: What I want, when I want

The online environment is of great importance to the Belgian Vlaamse Media Maatschappij. The new media platform **iWatch** has been launched in 2007 and with VOD viewers can watch their favourite programmes at a time they decide.





New media platforms > Sweden



MTG: Anywhere, anytime

MTG is in the forefront of implementing *the “anywhere, anytime” strategy* to its satellite TV subscribers as well to anyone with a broadband connection in the Nordic region. The brand name is **Viasat OnDemand**. The recordable satellite set-box **ViasatPlusHD** is connected to the subscribers' broadband and gives, in Sweden as an example, access to services from MTG's FTA TV channels and third party suppliers. Subscribers to the movie and documentary packages also have access to services from TV1000, TV1000 HD, Viasat History, Viasat Explorer and Viasat Nature. In addition more than 1,000 movies are available on a pay-per-day basis. Internet users can access the free-TV services, which are streamed to their computers for free. Internet users can also pay-per-day for more than 1,000 movies as well as pay-per-event for live sports coverage of premium events such as UEFA Champions League and Formula One.



“Internet users can also pay-per-day for more than 1,000 movies ”



TV4: Thematic channels & interactivity

TV4 Group was quick to realise how critically important it was to invest in alternative platforms in a rapidly changing televisual landscape. With its rich channel portfolio and extensive network of complementary websites, mobile services and 24/7 accessibility, the TV4 Group leads the field in thematic channels and interactivity. TV4 New Media operates ten independent web sites, most of them market leader in their respective field.

- **TV4.se** is home for a number of extensive programme sites like *Pop Idol*, *Let's dance (Strictly come dancing)* and *Robinson (Survivor)*. TV4 New Media reaching over 1,3 million users each week. Its increasingly popular access portals offer numerous websites for news, weather, TV information, football analysis, youth forums and recipes, accessed via both computer and mobile phone.
- **TV4 Play** gives Internet and IPTV users access to a wide selection of programmes from the TV4 Group's schedules, any time of day or night. Along with regularly updated text-TV, the advanced VOD service meets the users' demands for accessibility. Part of the VOD material on TV4 Play is Catch-up material, which is free for viewers, and carries advertising. There is also a subscribed section of TV4 Play where viewers can access both older programmes and exclusive programmes and clips for TV4 Play.



New media platforms > Bulgaria



bTV: Leading website in Bulgaria

bTV was the first national TV station in Bulgaria that invested heavily in the Internet and within one year the media portal www.btv.bg went up to the Top 3 of most visited websites in the country. Since February 2008, Internet users can watch bTV online for free on the territory of the country. Every day the website offers exclusive TV content, a rich archive of news and entertainment programmes, various opportunities for feedback and User-Generated Content, pictures and detailed information about the programme of the station. The website is visited by more than 100,000 users daily. bTV also invests in websites about separate programmes and projects. Among others these include a *Music Idol* website, a *Survivor* website and a website on the Bulgarian elections.



bTV-Homepage



bTV-Elections website

VII PUBLIC VALUE



How to define public value? At one level, there is a rarified policy debate among commercial and public broadcasters, with policy-makers, stakeholders and citizens all over Europe.

At a more everyday level, one thing is certain – **the medium of television contributes as a whole to public value**. It has an impact on society and makes a contribution to citizens' lives. That is why local programming, taking into account national, regional and local tastes, is so successful. TV matters to people, it allows relaxing, it informs and entertains, and in the age of interactive television, even engages with them. Through the variety of channels, programmes and formats – **ranging from 24h news channels to children programmes, reality shows, drama and fiction** – available either via free or Pay-TV channels, people can always decide what to watch and when to tune in.

Under this heading, we do not restrict ourselves to high-end or challenging content. There is also a public value, we believe, in straightforward entertainment.

In line with the **digitisation process** and the continuous launch of thematic channels, people will have an ever greater choice of creative content. Commercial broadcasters take **financial risks** when investing billions of Euro in content creation each year. Although not all programmes turn out to be a hit, millions of viewers every day show that creative content will always attract its audience.

VII.1 Entertainment

THERE ARE SO MANY DIFFERENT WAYS TO ENTERTAIN PEOPLE – WHETHER IT IS THROUGH COOKING OR TALENT SHOWS, MUSIC CHANNELS, CRIME PROGRAMMES OR CARTOONS, IN THE END IT IS ABOUT MAKING PEOPLE HAPPY AND RELAXED. COMMERCIAL BROADCASTERS AIM TO BE CLOSE TO THEIR VIEWERS, MEET THEIR LOCAL TASTES AND INTERACT WITH THEM. SUCCESSFUL FORMATS LIKE POP IDOL ARE TRAVELLING THROUGHOUT EUROPE AND ARE NOWADAYS EVEN BEING IMPORTED TO THE US.



Entertainment > France



Canal+: Canal+ Family

Latest of the Canal+ channels, *Canal+ Family* celebrated its first anniversary in 2008. With the smile, thanks to its original programmes, often exclusive, and without advertising or violence, and which unmistakably found their public. *Canal+ Family* stood out as the first multigenerational premium channel thanks to a great variety of programmes; *Turkish for Beginners*, a German award winning series, investigates the relations between teenagers and parents within a family with opposite cultures; *Robin Hood*, a British series with images and rhythm in the vein of the big action movies and *Roman Mysteries*, which takes us to the Ancient Rome, along with 4 children in love with justice and adventure.

“Canal+ Family stood out as the first multigenerational premium channel”



M6: Un Dîner Presque Parfait (Come Dine With Me)

A new type of contest mixing the art of entertaining at home, home decoration and culinary arts. Each contestant must demonstrate generosity and creativity to surprise their guests. This offers TV viewers a tour of France's regions and their culinary specialities. The programme is regularly ahead in the ratings with an average of 2.5 million viewers each evening. Moreover, it won the CB News Grand Prix des Médias for the best studio programme.

Name of the Producer:	Studio 89 Productions
Transmission day & time:	Weekdays, at 5.50 pm
Number of viewers:	2.3 million each evening (Médiamétrie, 1Q 2009)



Un Dîner Presque Parfait (©Julien Knaub M6)



M6: Nouvelle Star Season 7 (Pop Idol)

Nouvelle Star (Pop Idol) is a talent contest to decide the best new young pop singer based on viewer voting and participation. The format of Nouvelle Star is produced by FremantleMedia and has been sold to several countries worldwide. The show has been running since 2002.

Name of the Producer:	FremantleMedia
Transmission day & time:	Once a year, every Tuesday from 24 February 2009 to 9 June 2009, at 8.40 pm
Audience share:	4.2 million in average
Target audience:	2.3 million each evening (Médiamétrie, 1Q 2009)



Nouvelle Star Season 7 (©M6 FMF abacapress.com)



ITV: Britain's Got Talent

Entertainment is a significant part of the ITV1 schedule, enabling ITV to bring audiences together around big, mass appeal events. In the first half of 2009, ITV continued to consolidate its leading position as home of the big household name shows with the return of Britain's Got Talent. Presented by British celebrities Ant & Dec, singers, dancers, comedians, variety acts, and other performers compete against each other for audience support. The third series began on 11 April 2009 and ended on 30 May 2009 with dance troupe Diversity being named the winners in a gripping final.

Name of the Producer:	Talkback Thames
Transmission day & time:	30 May 2009
Audience share:	68%

“ITV continued to consolidate its leading position in entertainment”



TF1

TF1 has reasserted its position as the leading creator of TV events, with exceptional evenings such as Les Secrets des Enfoirés, which attracted nearly 11 million viewers, and Miss France, with more than 8 million viewers. TF1 also appeals to all generations with access prime time programmes such as A Prendre ou à Laisser, La Roue de la Fortune and Qui Veut Gagner des Millions?. In terms of reality TV, Koh Lanta, presented by Denis Brogniart, has proven to be a leading adventure show.

“TF1 has reasserted its position as the leading creator of TV events”



MTV Networks International: MTV Europe Awards

Since 1994, the MTV Europe Music Awards has established a reputation as one of the most sensational, maverick music award shows in the world. Ground-breaking multi-platform viewing options including live artist web-chat, exclusive web and mobile performances and WAP content downloads combined with dazzling performances from A-list stars makes for an electric atmosphere where anything can - and does - happen. Past performers have included Madonna, U2, Christina Aguilera, Foo Fighters, Aerosmith, Green Day, Coldplay, P Diddy and Beyoncé. MTV Europe Music Awards take place in a different European city every year. Past host cities include Liverpool, Munich, Copenhagen, Lisbon, Rome, Edinburgh, Barcelona, Frankfurt, Stockholm, Dublin, Milan, Rotterdam, London, Paris and Berlin. In 2008, the MTV Europe Music Awards broadcast to a potential worldwide audience of more than 1.4 billion people in 179 countries including a live broadcast across Europe, Africa and the Middle East. In addition to its 56 TV channels globally, MTV has 47 websites, 19 broadband services and 17 mobile TV channels and mobile VOD services - including distribution to the majority of the world's video-enabled mobile handsets.



Katy Perry



Entertainment > United Kingdom



BSkyB

Sky understands the importance of great TV and invests over £1.3 billion a year in its channels to make sure Sky's customers get what they want. Whether it is Sky Sports' commitment to the highest standards in sports broadcasting, Sky News' reputation for breaking news, the best in entertainment from Sky1, or the unparalleled Sky Arts, Sky maintains a unique position in UK broadcasting. As part of its leadership in HDTV, an ever-growing proportion of Sky's commissioned programming in entertainment, arts and sport is now broadcast in HD, as are many of Sky acquired programmes in entertainment and movies.

“Sky understands the importance of great TV”

Berlin will host the 2009 MTV Europe Music Awards. This is the fourth time that the Awards will be held in Germany as it returns to the city where it was launched to commemorate the 20th anniversary of the fall of the Berlin Wall.

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Entertainment > Spain



Antena 3 TV: El Diario

Antena 3 TV has the longest-running and most successful talk-shows on Spanish television. In 2008, the first of these, *El Diario* (18.5%), re-vamped after seven years on the air its format and contents and added a new host, Sandra Daviu. Thanks to these changes, the programme has beaten its previous success and has recovered its dominance in the afternoon. Additionally, there is *Dónde Estónde Estás Corazón* (20.6%), the leading show on Friday nights. This show is still hosted by Jaime Cantizano, one of the most well-known personalities on Antena 3 TV. This classic talk show maintains its attraction thanks to the most well-known and controversial personalities in Spain.

“Antena 3 TV has the longest-running and most successful talk-shows on Spanish television”



Cuatro (Sogecable): Fama (Fame)

Cuatro was the first channel to broadcast a live reality show at lunchtime from Monday to Friday; this proved to be a highly successful decision as *Fama* achieved an audience share of 12.1% (1,449,000 viewers) during its first season and continued to increase in popularity until peaking at 15% in the final episode. It was very well received by all targets, and especially by young people (30.2%), for whom it was the most-watched daytime programme in 2007/08. Fame was also the most popular programme among the under 45 year-olds (21.1%) and the commercial target (17.7%).

“Fama achieved an audience share of 12.1% (1,449,000 viewers) during its first season”



Entertainment > Italy



Canale 5 (Mediaset): Striscia la Notizia

Striscia la notizia broadcast from September until June on Canale 5 in access primetime, after the evening news. The first episode was aired on 7 November 1988 on Italia 1. It is defined as “satirical news” and it has always mixed take-offs related to politics and current affairs with reports about community welfare, environmental and consumer protection issues. These include for example waste management, billing services, cheating magicians and misleading advertising. The programme developed from suggestions from the viewers and several cases gathered national interest and triggered judicial proceedings. For example, *Striscia* played an important role in discovering the fraud of a TV barker; the material collected by the programme’s staff was used during the trial. By now the programme has turned from a comic to a satirical and denouncing one.



Name of the Producer:	R.T.I
Transmission day & time:	From Monday to Saturday, at 20.45 pm
Audience share:	30%
Target audience:	15-60 year-olds



Entertainment > Poland



TVN: Dzień dobry TVN (Good Morning TVN)

The most popular everyday morning show in Poland, devoted to news, entertainment and social issues. Since its creation in September 2005, it has been dedicating, every Saturday and Sunday, 10-minute-long panels to health issues ranging from diseases prevention and treatment to diet and fitness. *Dzień Dobry TVN* puts the emphasis on parenthood and children. In its weekly panel *Misja mama* (*Mission Mother*) the importance of children’s health, education, rights and parenting is being stressed. Every day *Dzień dobry TVN* features experts on different socially important topics. The experts answer audience questions during the programme via telephone.

Name of the Producer:	TVN
Transmission day & time:	Everyday between 8.30 am – 11 am
Target audience:	16-49 year-olds, cities 100 000+
Audience share:	16.6%



Dzien Dobry TVN



Entertainment > Belgium



vtm (VMMa): SOS Piet

Chef Piet Huysentruyt visits Flemish people who have problems with cooking a specific dish and cooks together with them in order to solve the problem. Piet shows “on the spot” how the problem should be solved, combining the problem solving with new tips & cooking tricks. He always finishes the session with three learning points. Each episode is a mix of three cooking problems. His books are a great success, with over 400,000 copies sold.

Name of the Producer:	WWCC (World Wide Cooking Company)
Transmission day & time:	Sunday, 6.25 pm
Target audience:	18-54 year-olds
Audience share:	32.6%



SOS Piet

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Entertainment > Denmark



TV3 (MTG): Luxury Trap

Reality show portraying families that fell into financial hardship and helping them to regain their lives.

Name of the Producer:	TV3
Transmission day & time:	Tuesday, at 8 pm
Target audience:	15-49 year-olds
Audience share:	31%



Entertainment > Sweden



TV3 (MTG): Sports Superstars

Past and present sports superstars compete in a variety of sports challenges, but not necessarily in their field.

Name of the Producer:	TV3
Transmission day & time:	Tuesday, Wednesday, Thursday, at 8 pm
Target audience:	15-49 year-olds
Audience share:	25%



TV4: Idol 2008

TV4 was one of the first broadcasting companies to invest in Swedish versions of major international formats. *Pop Idol* and *Strictly Come Dancing* are examples of shows that still have a given place in TV4's schedules. Both shows attract big audiences, and the public's and other media's attention. After the very popular audition tour programmes, which kick off the season and are aired over several days a week for a number of weeks, the live shows are broadcast every Friday before an enthusiastic live audience. The Swedish *Pop Idol* final show was broadcast live from the Stockholm Globe Arena in December, and was the largest Idol show in the world. The winner of *Idol 2008* – the fifth season in Sweden – was Kevin Borg.

Name of the Producer:	Meter Film & Television
Transmission day & time:	Friday, 8 pm – 9.30 pm, result part, 10.25 pm
Target audience:	12-59 year-olds
Audience share:	40.8%

“Past and present sports superstars compete in a variety of sports challenges”

“TV4 was one of the first broadcasting companies to invest in Swedish versions of major international formats”



Entertainment > Finland



MTV MEDIA: Dancing with the Stars

MTV3's version of *Dancing with the Stars/ Strictly Come Dancing* is Finland's most popular entertainment programme. Broadcast on 13 April 2009, the final attracted an impressive 1.5 million viewers of Finland's total population of 5.3 million. The show's popularity has been increasing and Season 4 seen in spring 2009 broke all previous viewing records. The average number of viewers was 1.25 million.

“Dancing with the Stars is Finland's most popular entertainment programme”



Entertainment > Estonia



TV3 (MTG): Superstar

Superstar is a talent based entertainment show.

Name of the Producer:	TV3
Transmission day & time:	Sunday, at 8.30 pm
Target audience:	15-49 year-olds
Audience share:	40%



Entertainment > Slovenia



POP TV (CME): Can U Digg It?

A dynamic, interesting, loud and energetic show hosted by Lado Bizovicar and Jurij Zrnec, masters of television, animation, originality and diversity! POP TV had to expand its studio for such a big show! Each programme features sketches, famous guests, music performances and a few surprises along the way. Viewers can learn everything and even more about famous people from show business, as they tell the hosts about things nobody has known before.

Name of the Producer:	PRO PLUS
Transmission day & time:	Sunday, at 8 pm
Target audience:	18-49 year-olds
Audience share:	39%



Can U Digg It?

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Entertainment > Croatia



NovaTV (CME): Red Carpet

The longest running locally produced show on Nova TV. For six years *Red Carpet* has been the most popular and highest rated showbiz magazine in Croatia.

Name of the Producer:	Nova TV
Transmission day & time:	1 September – 31 May 2009, Sunday, at 11 pm
Target audience:	18-49 year-olds
Audience share:	41%



Red Carpet - Ana Stunic and Daniel Delale



Entertainment > Romania



Pro TV (CME): Dancing for You

Besides being the most successful Romanian entertainment show, *Dancing for You* has shown to its viewers that dreaming is made possible! The licensed format is produced locally and celebrities partner with members of the public in a dancing competition. Pro TV has now produced seven seasons of “*Dancing for You*”.

Name of the Producer:	Pro TV
Transmission day & time:	Friday, at 8.30 pm
Target audience:	18-49 urban year-olds
Audience share:	23%



Dancing for You



Entertainment > Bulgaria



bTV: The Magnificent Six

Together with UNICEF, in January 2008, bTV initiated the shutdown of the home for abandoned children in Mogilino, that became notorious after bTV broadcast BBC's film *The Abandoned Children in Bulgaria*, and a fundraising campaign for creating small children's houses to move the children in a close to the family environment. bTV created a precedent by creating a special TV programme and invested in a charity show with the participation free of charge of 12 Bulgarian personalities. The mobile operators and the company, servicing the SMS telephony, also gave up their profit, thus every SMS, sent by viewers, added 1 lev to the noble cause. *The Magnificent Six* argued that society should not tolerate the living conditions of the kids abandoned in Mogilino, and urged the Government to take drastic measures for solving the problem. At the end of the fundraising campaign bTV and UNICEF gathered more than €1 million. These funds are managed by UNICEF. All small children's houses are expected to be completed by the end of 2009.



Magnificent Six

Name of the Producer:	bTV and Global Films
Transmission day & time:	January-February 2008, 12 shows, aired Mondays and Thursdays in primetime at 8 pm
Target audience:	General audience, Government
Audience share:	50.2%



Magnificent Six



Entertainment > Greece



MEGA: Beat the Blondes

Blondes who are tired of listening to dumb blonde jokes now have the opportunity to take their revenge. A game show with worldwide success has the same outcome in Greece.

Name of the Producer:	Studio ATA
Transmission day & time:	Saturdays, at 9 pm
Target audience:	15-44 year-olds
Audience share:	31.7%



Entertainment > Turkey



Kanal D: BKM's Çok Güzel Hareketler Bunlar (These Are Great Moves)

An enjoyable entertainment programme, which enables television viewers to watch theatrical sketches. The group was originally founded as BKM and first performed these works on their own stage before transferring them to television. For four years, 22 young performers who are learning their trade on the BKM stage have appeared on Kanal D to perform sketches they have written themselves for television viewers. This entertainment programme is very popular with viewers and has broken rating records.

Name of the Producer:	BKM / Mr.Necati Akpınar
Transmission day & time:	Sundays, at 8 pm
Target audience:	Age 12-34 abc1 (26.4%); AB (25.2%); age 25-44 abc1 (24.9%)
Audience share:	23.2% (Total Individuals)



BKM

VII.2 News

REACHING YOUNG AUDIENCES AND ENGAGING THEM IN POLITICS IS A CHALLENGE. COMMERCIAL BROADCASTERS PRESENT NEWS IN A DIFFERENT AND INFORMATIVE WAY, RESULTING IN VERY SUCCESSFUL RATINGS. LAUNCHED BY COMMERCIAL BROADCASTERS IN THE FACE OF CONSIDERABLE INDUSTRY SCEPTICISM, 24H NEWS CHANNELS ARE NOW POPULAR IN MANY EUROPEAN MARKETS. COVERING NATIONAL, EUROPEAN AND INTERNATIONAL STORIES AND OFTEN LEADING THE WAY IN COMBINING TV WITH THE INTERNET, COMMERCIAL BROADCASTERS ALSO GIVE AN APPROPRIATE PLACE TO GLOBAL POLITICAL DEVELOPMENTS.



News > France



Canal+: US Elections

Presidential elections in the US obliged, from 1 until 7 November 2008, the French pay-TV operator Canal+ to switch to the US time to cover this event. Broadcast from Manhattan, for three live programmes, *Le Grand Journal* welcomed US editorial writers and prestigious invitees to the last moments of the Obama / McCain duel. And throughout the week, the other magazines of the channel were also revisited "à l'Américaine". During the night of 4/5 November, presenters commented live on this ballot, which has seen the entry of Barack Obama, the first black President of the US in the history in the White House.

“Canal+ was revisited
‘à l'Américaine’”



M6: 100% Mag

A new daily news magazine hosted by Estelle Denis, offers another way of decoding today's world and sheds new light on the phenomena and developments, which affect our society. In January 2009, the programme recorded its highest weekly audience share with housewives under 50: 26.8%.



100%Mag (©Eric Robert M6)



M6: Enquête Exclusive

Launched in 2006, this magazine takes its viewers all over the world to shed light on controversial issues. Each show consists of only one long report touching on geopolitical or factual subjects (kidnapping in Colombia, criminality in Paris, shanty towns in Abidjan...). Since the end of 2008, the programme has recorded its highest scores with an average audience share of 19%.



Enquête Exclusive (©Pierre Olivier M6)

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TF1

News is an important pillar of TF1 programming. It is shown in the form of news programmes and investigative, human-interest shows, presented by leading names including Claire Chazal, Laurence Ferrari, Jean-Pierre Pernaut, Harry Roselmack and Julien Arnaud, and backed by the finest journalists in economics, politics and international affairs. The editorial team, common to TF1 and LCI, provides unrivalled event coverage and special programmes. TF1 news bulletins get excellent ratings. The lunchtime news broadcast is watched by an average 6.4 million viewers, which amounts to a 47.6% audience share. The 7.7 million loyal viewers of the 8 o'clock evening news programme give TF1 a 35% audience share leading their nearest competitors by 3 million viewers, or 13.5 audience share points.



Sept à huit - Harry Roselmack



News > Spain



Antena 3 TV: Antena 3 Noticias

In 2008, Antena 3 TV provided the most popular news services of all private channels. *Antena 3 Noticias* scored a further victory against its rivals (18.9% on average considering both the 1st and 2nd news programme, from Monday to Sunday), for the programmes from Monday to Friday, and also those from Monday to Sunday. What is more, Matías Prats, the presenter of the prime time programme, was considered to be the best newscaster in Spain, and has been voted as TV personality with the best image for the fourth successive year.

“In 2008, Antena 3 TV provided the most popular news services of all private channels”



News > Italy



Canale 5 (Mediaset): Tg5

Tg5 is the TV newscast of Canale 5. It was first broadcast on 13 January 1992 and is the second most popular news programme in Italy with 28% of audience share (15 – 60 year-olds). Its journalists work in two editorial offices: the main one in Rome, and a satellite in Milan. From the start, *Tg5* relied on a light and versatile territorial structure, mainly for economic reasons; it does not have correspondents from foreign cities and covers the events with local contacts or, quite often, with journalists specifically sent from Italy. It has only a little office in New York, used as a support base for the correspondents coming from Italy. However, in order to address the increasing relevance of news related to the EU Institutions to the Italian audience, Canal 5 – Mediaset's FTA flagship channel – will soon have a correspondent in Brussels. A similar structure has also been adopted to cover 20 Italian regions: one correspondent only per regional office who can resort to colleagues in either Rome or Milan for additional reporting whenever necessary.



TG5



News > Germany



RTL Television (RTL Group): RTL Aktuell

In 2008, RTL Television's news *RTL Aktuell*, from Monday to Friday, moderated by Peter Kloeppel, was the number-one news choice among young audiences (14 – 49 year-olds) for the 16th consecutive year, with an average of 19.4% of this target demographic.

“RTL Aktuell was the number-one news choice”



News > United Kingdom



BSkyB: Sky News

Launched in 1989 as Europe's first rolling 24-hour news channel, *Sky News* has changed the face of TV news in the UK. Wherever and whenever important stories break, *Sky News* is there – always providing comprehensive and accurate coverage. Sky's award-winning coverage can be accessed on TV, through the web, on mobile phones, on big screens at train stations and on radio- so it is always possible to keep up to date when on the move. With a superb track record for breaking the big stories first, *Sky News* remains the channel of choice for newsrooms and other organisations, which need fast and accurate coverage of major news stories.



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News > Poland



TVN: TVN24

Poland's first 24-hour news channel with the highest market share (2,7% among 25+ year-olds, cities 100 000+). Since its launch *TVN24* has maintained the highest quality standards of news coverage and according to Media Monitoring Institute is the most opinion-making TV channel in Poland. *TVN24* offers independent journalism of the highest quality as well as enabling audience to access and interact with its most innovative news portal tvn24.pl. It encourages conversation and debate about news, current affairs and topical issues. In 2006, it received the HOT BIRD award. *TVN24* was awarded in the category "market dynamism" for its innovative production and technology. At the *Impactor 2006*, *TVN24* was recognised as the most credible media of the year. <http://www.tvn24.pl>



News > Sweden



TV4: TV4News

Sweden's largest news channel. Through 40 broadcasts every day, via TV, web, mobile platforms and radio, the *TV4News* keeps Swedes updated on what is going on around the world. 24 hours a day, 7 days a week. During one week, *TV4News* reaches 60% of the Swedish population, more than 5 million viewers. And Bengt Magnusson has been voted the country's best news anchor over many years. *TV4News* has two main broadcasts every evening – and the late news at 10 pm is by far Sweden's most popular news programme in the target group 12-59 year-olds. The News and Actuality Department also broadcasts on local news over 25 affiliate stations six times a day, the breakfast show *Nyhetsmorgon* seven days a week, documentaries, debates and actuality programmes. Among those are *Kalla fakta* (Cold Facts), which has attracted both national and international attention and awards for its journalistic achievements.

“TV4News reaches
60% of the Swedish
population, more
than 5 million viewers”



News > Finland



MTV MEDIA: MTV3's multiple-media news

In addition to TV news, the MTV3 news organisation produces news for the company's radio station, websites, teletext and a variety of mobile devices. In 2008, the number of visitors to MTV3's news was up 355,000 on the year before.



MTV3 News



News > Lithuania



TV3 (MTG): TV News

General news programme broadcast daily at 6.45 pm. Very successful audience shares with 35% for the target audience 4+ year-olds.



News > Czech Republic



TV Nova (CME): TV News

TV News is the most popular news programme in the Czech Republic broadcast daily at 7.30 pm and the most successful news programme in Europe in terms of audience share (65% for 15 – 54 year-olds). Based on an original concept, it not only offers top political stories but also covers issues marginalised by other parts of the media, focusing especially on social problems affecting society.



TV News



News > Bulgaria



Nova TV (MTG): TSN

General News Programme

Transmission day & time:	Daily, morning, lunchtime and evening, at 7 pm
Target audience:	18-49 year-olds
Audience share:	25%



News > Ukraine



Studio1+1 (CME): TSN – News

TSN - News is the only news programme in the country more focused on problems of common Ukrainians than on political events. *TSN's* objective is to highlight problematic issues, which bother every citizen in the country. They do their best to attract public attention and either solve the problem as such or demonstrate an effective way of how the viewer could solve the problem. A telephone hotline operates non-stop for viewers to tell their stories

Transmission day & time:	Daily, at 7 am, 8 am, 9 am, 5 pm, 7 pm and 10.30 pm
Target audience:	25-54 year-olds
Audience share:	18%



TSN - News

VII.3 Sports

REACHING MASS AUDIENCES AND ENGAGING WITH MILLIONS OF VIEWERS – THIS CAN BEST BE DONE THROUGH SPORTS. NO MATTER WHAT KIND OF SPORTS OR COUNTRY YOU LOOK AT – SPORT MATTERS TO PEOPLE AND CONTINUES TO REACH HIGHEST POSSIBLE RATINGS EVER. THAT IS WHY ADVERTISING AROUND SPORTS EVENTS CONTINUES TO BE SO SUCCESSFUL. FOOTBALL, BOXING, TENNIS BUT ALSO ICE-HOCKEY, CRICKET, SKIING, OR HANDBALL – THE VARIETY OF SPORTS TO WATCH IS ENORMOUS MEETING THE VARYING TASTES OF EUROPEAN CITIZENS.



Sports > France



TF1

TF1 sports programmes demonstrated their ability to provide atmosphere and exclusivity with their coverage of the *UEFA Euro 2008*. These were held in Switzerland and Austria and were the biggest sports event of the year. Audience ratings were strong, with an average 6.8 million TV viewers and a 32.2% share of the 4-and-over demographic for the 14 matches broadcast on TF1, culminating in 12.7 million viewers for the France / Holland match on 13 June 2008.

Formula One continued to be the major regularly scheduled event, with ratings averaging 3 million viewers over the year's 17 races, the last of which was run in Brazil.

TF1 sports programming also includes two long-standing leading magazines: *Automoto*, which drew an average 1.5 million TV viewers, and *Telefoot*, which confirmed its status as a major sports magazine in a context of heightened competition with an average 2 million viewers every Sunday.



Sports > Germany



N-TV (RTL Group): Beijing Paralympics

On the evening of 11 November 2008, RTL Television and N-TV accepted the *German Paralympics Media Award 2008* in the TV category in Berlin for their coverage of the Paralympics in Beijing in attendance of German Chancellor Angela Merkel. The *German Paralympics Media Award* has been presented since 1999 at the *Night of Stars*, a charity gala hosted by the Förderkreis Behindertensport e. V. (Organisation for Advancement of Sport for People with Disabilities). The award is sponsored by the *Deutsche Gesetzliche Unfallversicherung* (German accident insurance company) to honour outstanding journalistic contributions on the topic of sports for people with disabilities. It has become established as one of the most prestigious German prizes for sports reporting.

“On the evening of 11 November 2008, RTL Television and N-TV accepted the German Paralympics Media Award 2008”



Sports > United Kingdom



ITV: UEFA Champions League

The *UEFA Champions League* final in May 2009 saw Barcelona beat the current holders Manchester United 2 -0 in the Stadio Olimpico in Rome. ITV's coverage of the tournament had started the previous August with Liverpool's qualifying games and the final whistle in Rome saw Alex Ferguson's men fail in their bid to become the first team to successfully defend the title. Presented by Steve Rider with Andy Townsend, commentary from Clive Tyldesley and David Pleat and pitchside reports from Gabriel Clarke and Matt Smith, ITV's coverage of the final attracted a peak of 10.6 million viewers and a 42% share of male viewers.

Transmission day & time:	27 May 2009
Audience share:	34%



Sports > Spain



Cuatro (Sogecable): UEFA Euro 2008

2008 was a historic year for Spanish sport with a string of victories that culminated in Spain's victory in the *UEFA Euro 2008*. However, it was also a historic year for the channel in terms of viewership, as it achieved record audience figures thanks to its broadcasting of the championship. The *UEFA Euro 2008* in Austria and Switzerland achieved an audience share of 41% (an average of 5,932,000 viewers), giving the channel over 44 hours of leadership. The extraordinary work of the Spanish national team, which won its first UEFA European Championship in 44 years, and Cuatro's extensive coverage of the event made it the most-watched UEFA Euro tournament in history and one of the most viewed sporting events in Spain. With over 100 hours of coverage, Cuatro positioned itself as the highest rated channel for televised sporting events according to the GECA 2008 Image Study.

“The UEFA Champions League final in May 2009 saw Barcelona beat the current holders Manchester United 2-0 in the Stadio Olimpico in Rome”

“A historic year for the channel in terms of viewership, as it achieved record audience figures thanks to its broadcasting of the championship”

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Sports > Italy



Italia 1 (Mediaset): Grand Prix

Grand Prix is Mediaset's historic programme about the world of motor and races, first aired in 1977 and presented by the ex-racing car-driver Andrea De Adamich. Today, *Grand Prix* is produced by the motor department of Sport Mediaset.

Transmission day & time:	Sundays, at 12 pm
Target audience:	15-60 year-olds
Audience share:	10.3%



Grand Prix



Sports > Sweden



TV4: UEFA Euro 2008

More than 100 hours – all 31 games – live football. 54 live *UEFA Euro 2008* studio programmes. Blogs, news, press conferences – and a big public Euro 2008 event in the middle of Stockholm. The TV4 Group's extensive coverage of the *UEFA Euro 2008* was the largest sports event in the history of TV4, and a great success story.

TV4 also brings international athletics to the Swedish viewers, and *TV4 Sport* – Sweden's largest sports channel – shows both national and international live sports 365 days a week, including Spanish La Liga.

The sports departments cover everything that happens in the world of sports every day, all year round – and has daily sports news broadcasts both in the morning and in the evening.

Transmission day & time:	June 2008
Target audience:	12-59 year-olds



UEFA Euro 2008



Sports > Finland



MTV3 (MTV MEDIA): Ski Jumping

Broadcast on MTV3, the FIS Ski Jumping World Cup in Bischofshofen on 6 January 2008 was the most-viewed sports broadcast and the third most-viewed programme overall with 1.33 million viewers

“The FIS Ski Jumping World Cup was the most-viewed sports broadcast”



Sports > Denmark



TV3 Puls (MTG): Formula One

Transmission day & time:	Sundays
Target audience:	18-49 year-olds
Audience share:	20%



Sports > Czech Republic



TV Nova (CME): Formula One

TV Nova offers exclusive live broadcasting of Formula One motor racing throughout the season. Each programme is broadcast live and also features a studio based moderator summarising the news and events from Formula One.

Transmission day & time:	Sunday, depending on local race start time
Target audience:	15-54 year-olds
Audience share:	44%



Sports > Croatia



Nova TV (CME): Ultimate Fight in Croatia: Cro Cop vs. Choi

This one time sports event marked the return of Croatian fighter Mirko Filipovic, aka *Cro Cop*, after rehabilitation to the international K-1 fighting league. The programme was broadcast live on New Years Evening 2008 and attracted most of the Croatian viewers to Nova TV.

Transmission day & time:	31 December 2008 at 12 am (midnight)
Target audience:	18-49 year-olds
Audience share:	57%



F1



Cro Cop

80

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RTL Televizija (RTL Group): Handball World Cup

The Handball World Cup is the largest sporting event hosted by Croatia in the past 20 years and thus it carries great national importance. In addition, handball is one of the most popular sports in Croatia. Broadcasting the Handball World Cup, mainly requires to communicate the strong emotions of the handball players and fans in Croatian cities and arenas, as pointed out by RTL Televizija. All games in the tournament scored extremely high audience shares, culminating in the finals, when the encounter between the Croatian and French national teams became the most-watched programme in the history of TV audience measurement in Croatia among viewers aged 18 to 49.

Transmission day & time:	1 February 2009
Target audience:	18-49 year-olds
Audience share:	81.3%



“Most-watched programme in the history of TV audience measurement in Croatia”



VII.4 Drama / Fiction

RANGING FROM SOAPS TO SERIES, THRILLERS, FILM ADAPTATIONS OF RENOWNED NOVELS, DOCUMENTARIES OR COMEDY – THERE IS A GREAT VARIETY IN EUROPEAN DRAMA, WITH SUCCESSFUL RATINGS AND OFTEN AWARD-WINNING PROGRAMMES, SOME OF THEM EVEN BECOMING INTERNATIONAL HITS. INTERESTING TO NOTE THAT EUROPEAN COMMERCIAL BROADCASTERS DO NOT ONLY TAKE COMMON TOPICS, BUT ADDRESS SENSITIVE TOPICS SUCH AS TRANSSEXUALITY, PROBLEMS OF FOREIGNERS OR MINORITY CULTURES.

Drama / Fiction > France

Canal+: XIII: The Conspiracy

A Franco-Canadian 2008 TV mini-series based on the Franco-Belgian comic book series of the same title by Jean Van Hamme and William Vance. It revolves around an amnesiac protagonist who seeks to discover his concealed past. The series was directed by Duane Clark, stars Val Kilmer and Stephen Dorff, and was produced by Prodigy Pictures and Cipango Films. It was first shown on TV in France on 6 and 13 October 2008 on Canal+ and was sold, among other international broadcasters, to NBC.

Transmission day & time:	6 and 13 October 2008
Audience share:	17.4% of Canal+ subscribers = 1.1 million Canal+ subscribers (Médiamétrie)



XIII - The Conspiracy



TF1

French drama is in the DNA of TF1, which airs 100 prime time specials a year. TF1 is trying to find ways of making them fit better alongside the American series, without, however, just making them into carbon copies: TF1 plans to find new recurring heroes, as these are the mainstay of TF1 fiction and part of TF1 brand identity. TF1 is the only channel to have attracted more than 8 million viewers to programmes of this kind on thirteen different occasions. Major successes in 2008 included familiar heroes *Julie Lescaut* (setting a ratings record of nearly 9 million TV viewers), *Une Famille Formidable* (8.7 million viewers) and *Joséphine Ange Gardien* (8.6 million), family comedies such as *Le Gendre Idéal* (8.6 million), and one-off thrillers like *Papillon Noir* with Eric Cantona, Stéphane Freiss and Hélène de Fougerolles (8.7 million).



Drama



Drama / Fiction > Germany



**RTL Television (RTL Group):
Gute Zeiten, Schlechte Zeiten (GZSZ)**

Germany's most successful daily soap, broadcast on RTL Television for 16 years, tackled the difficult subject of drug addiction with the support of both the German Federal Health Minister Ulla Schmidt, and the Federal Government's Drug Commissioner Sabine Bätzing. In fact, the story had such an impact that Ulla Schmidt invited the team behind GZSZ to Berlin, where Chancellor Angela Merkel took the opportunity to commend the programme and its commitment to the battle against drugs.

Transmission day & time:	Weekdays, at 7.40 pm
Target audience:	14-49 year-olds
Audience share:	27%

“Germany’s most successful daily soap, broadcast on RTL Television for 16 years”



Drama / Fiction > United Kingdom



ITV: Whitechapel

Rupert Penry-Jones, Phil Davis and Steve Pemberton led the cast in this darkly atmospheric new two-part ITV thriller. Set against the contrasting facades of London's East End, a series of bloody, tragic and impossible crimes suggest someone is carrying out copycat Jack the Ripper murders 120 years after the killer first struck.

Transmission day & time:	February 2009
Audience share:	31%

“A series of bloody, tragic and impossible crimes”



ITV: Wuthering Heights

Broadcast in September 2009, and adapted for ITV1 by leading screen and TV writer Peter Bowker, Emily Bronte's novel is a shocking and passionate portrayal of ungoverned love and cruelty with two of the most memorable lovers in literature. Heathcliff is played by Tom Hardy with newcomer Charlotte Riley as Cathy. *Wuthering Heights* was commissioned by ITV and produced by Mammoth Screen with support from Screen Yorkshire. It was shot at a number of locations across West Yorkshire and the Yorkshire Dales and is just one example of ITV's continued investment in high-quality British drama.

“Emily Bronte’s novel is a shocking and passionate portrayal of ungoverned love and cruelty”



Drama / Fiction > Italy



**Canale 5 (Mediaset):
Maria Montessori – A Life for Children**

It is the story of Maria Montessori, a famous Italian pedagogue who lived in the 19th and 20th centuries. She developed children educational training under her name: the *Montessori method*, still famous and widely used all over the world. The drama shows not only her continuous professional success – she was the first woman to get a degree in medicine and surgery – but also her difficult private life; the paradox of a woman who brings up thousands of children but cannot take care of her own to avoid social scandal.

Transmission day & time:	2 episodes broadcast, at 9.15 pm
Target audience:	15-60 year-olds
Audience share:	24.48%; second episode: 34.58%



Maria Montessori

Drama / Fiction > Poland



TVN: Trzech kumpli (Three Buddies)

TVN broadcast and produced over the year high-quality documentaries with significant social impact. Having won several awards, *Trzech kumpli* (Three Buddies) is a documentary acknowledged for influencing people's lives and perception of reality.

Transmission day & time:	23 June 2008, at 10 pm
Target audience:	16-49 year-olds, cities 100 000+
Audience share:	11%



TVN: Wielkie ucieczki (Great Escape)

A story about those determined to leave their communist homelands whatever it took, whatever the cost. Produced for over two years, the series was shot in the US, Australia, Canada, Russia and Poland, with each episode telling the story of one “great escape”.

Transmission day & time:	6 April 2006, at 9.30 pm
Target audience:	16-49 year-olds, cities 100 000+
Audience share:	22%

“A story about those determined to leave their communist homelands”

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Drama / Fiction > Denmark



TV3 (MTG): Lulu and Lion

Lulu and Lion is a comedy/drama, in which Lulu falls into hardship, after her fiancée's arrest on her wedding day. She takes over his crime activities and the story is about her juggling her life as mother and gangster.

Transmission day & time:	Wednesdays, at 8 pm
Target audience:	15-49 year-olds



Drama / Fiction > Sweden



TV4: Wallander

The *Wallander*-series, detective stories based on the famous Swedish author Henning Mankell's character Kurt Wallander, the superintendent of Ystad police force, is highly appreciated by the TV audience.

During 2008 two new weekly drama series were also introduced by TV4. One of them, *Maria Wern – Främmande Fågel*, is a murder mystery based on the Swedish book with the same title written by Anna Janson. The other is the investigation drama *Oskyldigt dömd*, based on an original idea created for the channel with one of the most famous Swedish actors, Michael Persbrandt, in the leading role. TV4 also successfully produced and broadcast the police series *Beck* in co-operation with German ARD Degeto. This is one of the most successful drama series ever in Sweden. A total of 26 feature films with Beck have been produced since 1996, and for the moment two new movies are shown at the cinemas. The Beck series is also a big success on video and DVD.

Transmission day & time:	Sundays, at 9 pm
Target audience:	12-59 year-olds
Audience share:	42.5% (12-59)

“Maria Wern –
Främmande Fågel,
is a murder mystery
based on the
Swedish book
with the same title
written by
Anna Janson”



Drama / Fiction > Finland



MTV3 (MTV MEDIA): Salatut Elämät

Seen every weekday on MTV3, the Finnish soap *Salatut elämät* brings around 1 million viewers per broadcast. The show has been aired for 10 years and its popularity still remains strong.

“Aired for 10 years
and its popularity still
remains strong”



Drama / Fiction > Estonia



TV3 (MTG): Revenge Office

Revenge Office is the story of a private detective agency run by two women who deal with the cases and private life of their clients. This drama tells about the pitfalls of modern life in Estonia.

Transmission day & time:	Thursdays, at 9.30 pm
Target audience:	Female, 20-35 year-olds
Audience share:	40%

“Revenge Office is
the story of a private
detective agency run
by two women”



Drama / Fiction > Czech Republic



Prima TV (MTG): Very Fragile Relations

A group of young adults in Prague are being followed through their struggles and joys in their daily life.

Transmission day & time:	Tuesdays and Thursdays, 8 pm
Target audience:	15-54 year-olds
Audience share:	20%

86

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Drama / Fiction > Slovakia



TV Markizá (CME): Rose Clinic

This series reveals the secrets of medicine and life at a gynaecological and maternity ward and private gynaecological clinic. The two are connected, not only by the mission, but also by the professional and friendly relations among the main characters – the doctors and nurses, their families, partners, friends and patients. The writers of the series focus on the psychology of their characters living an authentic modern life.

Transmission day & time:	Tuesday and Thursday, at 8 pm
Target audience:	12+ year-olds
Audience share:	39%



Rose Clinic



Drama / Fiction > Romania



Acasa TV (CME): Regina

This is a spin off from the hugely popular *Gypsy Heart* series. It became an incredibly successful production in its own right and has managed to offer a new perspective of the Gipsy community.

Transmission day & time:	Weekdays, at 8.30 pm
Target audience:	15-49 year-olds, Female
Audience share:	21%



Regina



Drama / Fiction > Greece



MEGA: Hara Agnoeitai (Missing)

Hara is celebrating her birthday but she never returns home. Hara is a mysterious story where everyone is a suspect. Well hidden secrets and lies come to light while evidence unfolds. Dramatic revelations and exorciating questions make up the most dramatic series of the season.

Transmission day & time:	Wednesdays, at 10 pm
Target audience:	15-44 year-olds
Audience share:	32.6%



MEGA: Ta Mustika tis Edem (The Secrets of Edem)

About love and betrayal, well hidden secrets and lies, power and corruption, friendships being tested. The story of a group of friends struggling to make their childhood dreams come true. It is the most captivating drama that holds the first place on prime time television.

Transmission day & time:	Weekdays, at 7 pm
Target audience:	15-44 year-olds
Audience share:	38.4%



Drama / Fiction > Turkey



Kanal D: Aşk-ı Memnu (Forbidden Love)

This drama is an adaptation of the book *Aşk-ı Memnu* (Forbidden Love) by Halit Ziya Uşaklıgil, one of the leading names in the history of Turkish Literature. Turkish television's adaptations of classic works from the history of Turkish Literature are very popular and generate a lot of interest. The *Aşk-ı Memnu* series is an excellent example of a drama of this kind. Its strong cast, fascinating storyline and meticulous production have resulted in high ratings and the drama to become one of the most popular TV dramas ever.

Transmission day & time:	Thursdays, at 8 pm
Target audience:	Working Women (38.5%); females abc1 (33.2%); AB (33%)
Audience share:	24% (Total Individuals)



Aşk-ı Memnu

“Love and betrayal, well hidden secrets and lies, power and corruption, friendships being tested”



Drama / Fiction > Ukraine



Studio 1+1 (CME): Margosha

Margosha is a 60 part series about Gosha, a young and successful womanizer, who is turned into a woman by one of his offended girlfriends. Gosha has to learn how to live inside the female body. He begins to see things from a different point of view, his former friends become enemies, his usual habits have to be forgotten... And everything turns completely upside down when Margosha – that is the name Gosha uses in his female body – falls truly in love with her colleague.

Transmission day & time:	February – April 2008, 9.15 pm
Target audience:	20-35 year-olds, female
Audience share:	25%



Margosha



Factual programming > France



TF1

TF1 launched several news magazines in 2008 that anchor the channel in current events and everyday life in France. These include *Enquêtes et Révélations*, presented by Magalie Lunel in the late-night spot, *Combien Ça Coute l'Hebdo*, a weekly version of the leading consumer magazine presented by Jean-Pierre Pernaut and Justine Fraïoli, and *10h le Mag* a morning show hosted by Sandrine Quétier and Julien Arnaud. A daily hour-long show, it aims to be on the ball and fast-paced, alternating between the studio and reports from elsewhere (6 to 8 per programme). Younger viewers are drawn to live television, light-hearted or more serious according to the subject under consideration. The two presenters are joined by a different guest each day as well as a trio of commentators.

“TF1 launched several news magazines in 2008 that anchor the channel in current events and everyday life in France”



Factual programming > Germany



RTL Television (RTL Group): Die Super Nanny

As a new season of *Die Super Nanny* started on RTL Television on 15 April 2009, Deutsche Kinderhilfe (German Children's Aid) praised the many positive consequences of the Docusoap. Kinderhilfe cited the results of TV Super Nannys research project at the University of Vienna in 2006, which confirmed the positive consequences of the programme: *Super Nanny* does increase parents' willingness to seek professional advice on parenting. At the same time it increases the general awareness of child raising issues. The study also showed that the programme reaches precisely those parts of the population, which tend to be sceptical about professional counselling for parents.

Transmission day:	Wednesdays
Target audience:	Young viewers
Audience share:	18.5% (season 2008/2009)

90

91



Factual programming > Austria



PULS 4 (ProSiebenSat.1 Group): Talk of Town

Monday to Friday - right after the newscast – *Talk of Town* features a discussion on the main topic of the day: Live, outright and outspoken. The show does not only provide news on public issues, it also invites the audience to participate in discussions. Via phone call viewers are able to interact with experts and politicians, and state their point of view. With *Talk of Town - darüber spricht Österreich* PULS 4 offers its audience the only daily discussion on Austrian television. Every weekday at 7.45 pm the host Manuela Raidl welcomes three guests in the studio and discusses current public issues.



Talk of Town - Manuela Raidl



Factual programming > United Kingdom



ITV: Billy Connolly: Journey to the Edge of the World

This 4-part documentary series broadcast in March 2009, saw comedian Billy Connolly make a rare and remote journey – attempted and failed by hundreds before him – through the treacherous Northwest Passage from the Atlantic to the Pacific. Climate change has meant that, for a few weeks in the summer, the ice recedes making the crossing more accessible. During the journey Billy Connolly learnt how to be a bear whisperer, panned for gold with prospectors, learnt how to square dance, kayaked through ice floes between fishing trips and attempted the finer complexities of the Inuit language.

“This 4-part documentary series saw comedian Billy Connolly make a rare and remote journey”



Factual programming > Italy



Canale 5 (Mediaset): Matrix

A current affairs programme with a lot of guests in the studio and filmed reports. It is broadcast in second time three times a week on Canale 5 and each show focuses on analysis and discussion of a specific topic in business news, politics or other social issues of general public interest. The programme was first aired in 2005.



Transmission day & time:	Monday, Wednesday and Friday, at 11.30 pm
Target audience:	15-60 year-olds
Audience share:	20%



Factual programming > Sweden



TV3 (MTG): Efterlyst

In *Efterlyst*, the host investigates unsolved crimes and asks the audience for their help in solving those together with the police.

Transmission day & time:	Wednesdays, at 9 pm
Target audience:	25-59 year-olds
Audience share:	25%

“In Efterlyst, the host investigates unsolved crimes”



Factual programming > Lithuania



TV3 (MTG): Up-stream

A panorama current affairs show about topical news stories. It provides in depth reporting on Lithuanian affairs to the viewers.

Transmission day & time:	Tuesdays, at 7.40 pm
Target audience:	4+ year-olds
Audience share:	40%

“A panorama current affairs show about topical news stories”



Factual programming > Czech Republic



TV Nova (CME): Splinters

A current affairs magazine focusing on most important news and events of the previous week both at home and abroad. Besides a summary of the news, it also offers insights into topical issues and their ramifications.

Transmission day & time:	Sunday, at 10 pm
Target audience:	15-54 year-olds
Audience share:	45%



Splinters

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Factual programming > Slovenia



POP TV (CME): Confirmed!

The leading weekly investigative news show in Slovenia. Every week, its editor and host Alenka Arko, along with her co-workers, prepares the top Tuesday evening programme on Slovenian TV. Despite competition from other channels the popular format, which features four or five interesting reports each week about different areas of human lives, has succeeded in remaining the most popular show of its kind in Slovenia during 2009.

Transmission day & time:	Tuesday, at 8 pm
Target audience:	18-49 year-olds
Audience share:	36%



Confirmed!



Factual programming > Hungary



TV2 (ProSiebenSat.1 Group): Mokka

Every morning, TV2 presents *Mokka*, Hungary's leading morning show. From 7 am until 9 am, two host couples present the topics of the day. In the last five years, many important Hungarian as well as international personalities were among their guests. The show is committed to news concerning both up-to-date politics as well as common interest topics. Moreover, *Mokka* also encourages viewers to state their opinion. Interactivity comes into play thanks to the SMS service - the *Mokka Crawl*- featuring the viewers' posts for the daily opinion questions. The Hungarian ORTT (National Radio and Television Commission) chose the *Mokka Crawl* as the most balanced opinion-line in 2008.

“Every morning, TV2 presents Mokka, Hungary’s leading morning show”



Viasat3 (MTG): Mr Cheaky

It investigates “scandals” and addresses them in a humorous and controversial way.

Transmission day & time:	Sundays, 6 pm
Target audience:	15-49 year-olds
Audience share:	7%



Factual programming > Bulgaria



bTV: bTV Reporters

bTV regularly covers and investigates social issues and problems in its feature *bTV Reporters*, where the station's top reporters delve into various up-to-date topics. Many documentaries about abandoned children, disadvantaged people, health issues, problems in the family, ecological and educational problems, etc., were broadcast in *bTV Reporters* since 2008.

bTV was also the only station to broadcast BBC's notorious documentary film *Bulgaria's Abandoned Children*, alongside other documentaries on social issues, provided by external authors.

“bTV was the only station to broadcast BBC’s notorious documentary film Bulgaria’s Abandoned Children”



Factual programming > Ukraine



Studio 1+1 (CME): Different View

A documentary about so called “majors”, children of rich and powerful parents, who drive enormously, fast and expensive cars around the city of Kiev, often whilst being drunk or on drugs, and carelessly break the law. They are sure that whatever happens, their parents will bail them out of trouble and buy another car. There have been lethal accidents as a result of their behaviour, yet none of them have faced a jail sentence.

Transmission day & time:	17 May 2009, at 2 pm
Target audience:	25-54 year-olds
Audience share:	16%



VIII TAKING ACTION FOR SOCIETY



Over the last 15 years, **Corporate Social Responsibility (CSR)** has undoubtedly become a permanent fixture on the European business agenda and today, social, ethical and environmental responsibilities are becoming part of the DNA of every company.

This applies also to the **media sector**. Because they are part of the everyday life of millions of European citizens, broadcasters have a duty to respond to what is going on in the world and to help viewers better understand the social and environmental environment they live in.

The practice of CSR and sustainability for media companies has many unique features, which set it apart from other business sectors.

There are **five specific areas**, in which ACT members take action for society and collaborate with other stakeholders to engage with the society and help viewers to navigate into the new media environment:

- E-accessibility
- Children education & Media literacy
- Social campaigns & Charity events
- Environment & CO₂
- Ethical journalism

VIII.1 E-accessibility

REACHING MILLIONS OF EUROPEAN CITIZENS ALSO MEANS PROVIDING ACCESS TO THE DISABLED. AUDIO DESCRIPTION, SIGN LANGUAGE AND PROGRAMME SUBTITLING HELP THOSE WITH A DISABILITY AND THE ELDERLY TO ENJOY PROGRAMMES AND ACCESS NEW SERVICES ON THE INTERNET.



E-accessibility > France



M6

For M6 Group, accessibility primarily means providing access for the disabled. Top of the list is programme subtitling aimed at the deaf and hard of hearing. The Group has made constant efforts to increase the hours of programming with subtitles. The new digital control room opened in 2008 should make it easier to put subtitles on all content.



TF1

Over 70% of programmes are now subtitled, including news and weather. In 2008, TF1 began to broadcast audio-description, a process enabling the blind and partially-sighted to “see” a film thanks to a sound description of the action and background, a technique perfected by the *Association Valentin Haüy*. In 2009, TF1 continues with its efforts to extend this service to all networks.



Ushuaia Nature - subtitles



VIII.2 Children, Education & Media Literacy

TODAY, MEDIA LITERACY IS INCREASINGLY IMPORTANT TO SOCIAL INCLUSION - AS IMPORTANT AS READING AND WRITING, ACCORDING TO SOME POLITICIANS. TO EDUCATE CHILDREN, BUT ALSO PARENTS, IN THE NEW MEDIA ENVIRONMENT IS PART OF THE RESPONSIBILITY OF COMMERCIAL BROADCASTERS TOWARDS THEIR AUDIENCE.

Children, Education & Media Literacy > France

M6: Vinz and Lou on the Internet

By teaming up with the French Ministry of Education and the EU Commission, M6 is seeking to alert parents and minors to risks associated with using the Internet. Throughout May 2008 on M6 Kid, M6 broadcast the first season of the animated series *Vinz et Lou sur Internet* (*Vinz and Lou on the Internet*), created especially for this campaign. In all, there were 52 two-minute-long episodes of the series, which is aimed at children aged 7 to 12. The series sets out to educate children and play a preventive role, whilst at the same time encouraging parental control.



Vinz and Lou on the Internet

Children, Education & Media Literacy > Germany

Super RTL (RTL Group): Media Smart e.V

Founded in 2004, *Media Smart e.V.* is a non-profit association fostering media and advertising competences of children to help create mature consumers. *Media Smart*'s aim is to make children think of messages and intentions behind advertising, thus learning how to deal with it. Super RTL has been one of the founding members of *Media Smart* and Super RTL's Managing Director Claude Schmit is its Executive Chairman. Since 2005 the association has been distributing to half of all Germany primary schools free packages of teaching materials that have been recognised as helpful and effective by the Cologne's University of Applied Sciences, and by parents, too. <http://www.mediasmart.de/>



Media Smart

E-accessibility > United Kingdom

BSkyB

Access services such as audio description, subtitles and sign language make it easier for more people to enjoy programmes on Sky. Ofcom, the UK regulator, sets access services quotas for all broadcasters, and Sky exceeds all of its targets. Sky was the first TV broadcaster in the UK to launch audio description in 1999 and in 2009 it committed to increase audio description levels to 20% across all of its channels (excluding Sky Sports 1, 2 & 3 and Sky News); this doubles the Ofcom requirement. Sky has also developed specially designed remote controls for customers with visual impairments or limited dexterity. These are available free of charge for customers in need and were the first product in the UK to be awarded *Age Ok*, awarded to products that are designed with accessibility for older people in mind. Sky works with the *Shaw Trust*, a charity that supports disabled people, to improve the accessibility of all its websites. Sky is creating a new website with the latest information on accessibility at Sky and it will have functionality such as screen reading software, and the ability to change font size and page background colour for Sky customers with no vision, low vision, colour blindness, dyslexia, deafness and impaired mobility. The website will be Shaw Trust accredited, confirming it has been tested by people with a wide range of disabilities. <http://www.shaw-trust.org.uk/page/3/59/>

“Access services such as audio description, subtitles and sign language make it easier for more people to enjoy programmes on Sky”

E-accessibility > Spain

Digital+ (Sogecable)

Digital+ has voluntarily implemented an accessibility plan for its programmes, intended for the sensory disabled. It includes subtitling services for premieres shown on Canal+ as well as the rest of the pay-per-view (Taquilla) movie channels, making their contents accessible to all audiences.

“Digital+ has voluntarily implemented an accessibility plan”



Children, Education & Media Literacy > United Kingdom



BSkyB: Working with schools and making social issues accessible

Sky runs a number of programmes in schools that educate children and young people and inspire them to participate in Environment, Sport and Arts activities – Sky's three key areas of focus. For example, the broadcaster runs programmes such as *Appetite for Action* with its environment charity partner, *Global Action Plan*, which teaches children about food and waste. It works with the *Youth Sport Trust* to get young people involved in sport and engaging them with school life through the *Sky Sports Living for Sport* initiative. So far, more than 20,000 young people have taken part, many of whom have shown improved behaviour at school and increased self-confidence.

Sky's programming often raises awareness of important social issues and makes serious topics accessible and engaging for a wide audience – for example, health issues are a prominent topic on Sky Real Lives. Twice a year the channel runs an "extraordinary weight month" focusing on weight gain and loss. Sky is very conscious of the need to present difficult issues sensitively, making them accessible without sensationalising them.



"Sky runs a number of programmes in schools that educate children and young people and inspire them to participate in Environment, Sport and Arts activities"



MTV Networks International: Nicktrition

Nickelodeon's own on-air initiative educates kids on healthy lifestyles in a space where they are most receptive. During the 2008 summer Nickelodeon UK teamed up with *Change4Life*, a healthy lifestyle initiative from the Department of Health, which encourages people to eat healthy and get moving. As a result of the partnership, Nickelodeon UK included *Change4Life* messages and branding in bespoke Nicktrition TV spots that raise awareness of healthy eating and being active. 16 on-air spots a day reached more than 6 million people over 3 months. The campaign featured two spots, which explain Nicktrition and the importance of living a healthy lifestyle, other spots included animated vegetables performing a rap and cartoons explaining how to stay in shape.



MTV Networks International: Can you hear me Europe?

The EU Commission and MTVNI joined forces in 2009 and launched *Can you hear me Europe?*, a campaign aimed at prompting young people to make their voices heard by voting in the EP elections in June 2009. MTVNI broadcast three TV spots featuring young people hanging loudspeakers in London, Paris and Rome. This aimed to encourage young people throughout the EU to express themselves, to make their voices heard and to join the EU-wide *Can you hear me?* sound wave on 30 April 2009 at 3.30 pm. *Can you hear me Europe?* offered the younger generation a platform to express themselves and to address Brussels with their concerns, dreams, complaints and ideals.



"The EU Commission and MTVNI launched Can you hear me Europe?"

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VIII.3 Social Campaigns / Charity Events

PROMOTING SOCIAL CAMPAIGNS AND GIVING SUPPORT TO CHARITY FUNDRAISING HAVE ALWAYS BEEN PART OF EUROPEAN TELEVISION. THE POWER OF TELEVISION TO REACH MASS AUDIENCES HELPS TO ADDRESS SOCIAL ISSUES AT HOME AND GLOBALLY.

Social Campaigns / Charity Events > France

M6

M6 Group airs socially-oriented messages and short clips for free, thus helping charitable organisations. It supports the physically impaired and the fight against drink-driving and AIDS, among other, through its magazines and broadcasts. The Group also formed new partnerships in 2008 to increase awareness within society about public health and children protection issues.

“M6 Group airs socially-oriented messages”

TF1

TF1 Advertising and the TF1 Channel give charitable organisations a wide range of support, such as broadcasting prime-time specials, producing and airing advertising spots free-of-charge, donating game-show winnings (*Qui Veut Gagner des Millions* “NGOs Special”) or other benefits in kind, all of which is intended to make a contribution to social issues. In 2008, TF1 broadcast such programmes as *Opération Pièces Jaunes*, *Les Restos du Cœur*, *Agir pour Ingrid*, *La Rose Marie Claire*, *Les Stars se dépassent pour ELA*, *Sidaction*, *Le Défi pour la Terre*, etc. In 2008, sums donated totalled €16 million



Sidaction

Children, Education & Media Literacy > Poland

TVN: TVN Media School

An activity undertaken for the benefit of permanent improvement in the quality of competences and professional relations as well as innovative strategic directions providing a competitive advantage on the media and multimedia market. *TVN Media School* comprises training and educational programmes for TV producers and authors as well as specialists and experts creating modern multimedia and Internet solutions. The main objective is to establish a long-term competitive advantage through promoting the culture of image and sound among employees and recipients, constant improvement of professional qualifications, responding to the intellectual aspirations of the TVN Group staff, sharing knowledge and using best international practices.

Formats applied in the *TVN Media School*:

1. “Television Art University” comprises inspiring workshops and lectures shedding light on the secrets of producing TV programmes
2. Dedicated workshops for various groups within theme channels and in the editorial sections of the TVN Group
3. Image and Sound Culture: A cycle of meetings for all those who use images to tell a story, who work on the image form and who look for the means to express their message in a TV environment
4. Educational film production: Experienced cinematographers and directors talk about key elements of film structure that must be remembered by every young creator
5. Cooperation with film academies and schools: Workshops with the participation of students and teaching staff from Polish schools.

“TVN Media School comprises training and educational programmes for TV producers and authors as well as specialists and experts creating modern multimedia and Internet solutions”

Children, Education & Media Literacy > Finland

MTV MEDIA: Don't Feed the Recession

MTV3 has joined several other media companies in the national *Don't Feed the Recession* campaign promoting positive consumer behaviour to help ride out the recession.



Social Campaigns / Charity Events > Germany



ProSieben (ProSiebenSat.1 Group): Red Nose Day

In autumn 2009, ProSieben launched the 7th edition of the *Red Nose Day*, and the channels Sat.1 and kabel eins joined in for the first time, promoting projects for children in need. Since the launch of the campaign in 2003, more than €8 million were spent to help children all over the world. Once a year the TV channel broadcasts special programmes and motivates viewers to donate money for children. The sale of the popular Red Noses raises donations and symbolises the slogan *Have fun by doing good!* Many celebrities support the project through their pro-bono appearance in advertising spots. In addition, more companies become engaged with the *Red Nose Day* and in 2008, a popular fashion label designed a special T-shirt edition and donated the complete sales revenue (less production costs) to the project. With the Red Nose Day, ProSieben uses the force of its broad reach among young audiences to promote an issue of social value in popular way.



Red Nose Day



RTL Television (RTL Group): RTL Spendenmarathon

RTL Television has hosted this for 13 years now, helping children's aid projects all over the world, from Africa, to India and Germany. In 2007, the Dalai Lama helped the charity campaign to bring together the sum of €5.5 million. In 2008, the 24-hour-long telethon was also supported by a number of high-profile patrons, including Annie Lennox and Princess Madeleine of Sweden, and it raised about €7.1 million. In total, more than €71 million have been gathered since its launch. The latest achievement of the *RTL Spendenmarathon* is the construction of a new building for a girls' boarding school at the leprosy centre in Dhanbad (India).



RTL Spendenmarathon



Social Campaigns / Charity Events > United Kingdom



BSkyB: Bigger Picture Programme

Through its *Bigger Picture Programme*, Sky focuses on three areas where Sky believes it can make a positive contribution to UK life – these are helping to create a healthy environment, encouraging participation in sport, and opening up the arts to more people – and for all of these Sky links up with charity partners who can help the broadcaster deliver projects that can have real value and benefit.

For example, Sky has partnered with *Global Action Plan*, the charity that encourages practical environmental action, to transform the way people think about the environment and encourage Sky's employees and customers to get involved. Sky has pledged to give at least £1 million over three years to Global Action Plan through cash donations, in-kind support and fundraising activities by Sky and its people, and is helping the charity to raise its profile with Sky's customers too. Sky has also been supporting the *Prince's Rainforest Project* since 2007. Sky's sponsorship helps support some of the UK's most prestigious arts organisations including the Hay Festival, English National Opera, English National Ballet and the National Trust; Sky also partners with two regional organisations each month, and has a partnership with Artichoke to bring arts to the streets. Through our partnership with *British Cycling* we are aiming to get one million more people cycling regularly by 2013, are encouraging young people to get involved with sport through the Sky Sports living for Sport initiative, run in partnership with the *Youth Sport Trust*; and supporting cricket through a coach education programme with the *England and Wales Cricket Board*. Sky encourages its people to join in and support good causes. Sky offers a menu of team or individual volunteering opportunities that benefit the local community linked to the arts, sport and environment, which are organised by a select group of charity partners. Sky supports staff fundraising by providing match funding up to £300, or £600 if employees fundraise for its charity partner, Global Action Plan; and also offers to match payroll giving by 50p for every £1 with no cap.



“Through its Bigger Picture Programme, Sky focuses on three areas where Sky believes it can make a positive contribution to UK life”



MTV Networks International: Staying Alive

MTVNI's global HIV and AIDS prevention campaign, *Staying Alive*, educates young people and empowers them to stay protected. This Emmy® Award winning campaign, which is a partnership between MTVNI, Family Health International, the Kaiser Family Foundation, the United Nations Joint Programme on HIV/AIDS (UNAIDS) and the United Nations Population Fund (UNFPA), features documentaries, public service announcements, youth forums and multilingual web content. All *Staying Alive* programming is distributed rights and cost-free across the globe in order to get crucial prevention messages out to the widest possible audience. In recent years *Staying Alive* programming has included content featuring stars as Nelson Mandela or P Diddy and many more. 1 December 2008 marked the 10th anniversary of MTV's campaign. Since 1998, it has reached two thirds of the world's TV households annually. It has also reached over 90% of the 50 countries hit hardest by HIV/AIDS and received bundles of awards, amongst which are two Emmys. In 2004 *Staying Alive* launched *The Staying Alive Foundation* to provide small grants to young people on the frontlines of the pandemic who are playing their role in the fight against HIV/AIDS.



MTV Staying Alive - Travis McCoy



Telecinco: 12 Meses, 12 Causas

Since December 1999, Telecinco has created a unique project to increase viewer awareness in relation to 12 topics of social interest. This initiative called *12 Meses, 12 Causas* has led to Telecinco being seen as the most sensitive Spanish broadcaster of social values in the ranking of the Fundacion Empresa y Sociedad, measuring entrepreneurial social responsibility. For *12 Meses, 12 Causas* the network provides scheduling, dedicated adverts to the topic of the month and offers opinions and in-depth analysis in different programmes.

“Since December 1999, Telecinco has created a unique project to increase viewer awareness”



Social Campaigns / Charity Events > Italy



Mediaset: Mediafriends Onlus

A non - profit association established in 2003 by Mediaset, Mondadori and Medusa serving social purposes and pursuing solidarity objectives. In 2008, *Mediafriends Onlus* organised the *Laboratorio Mediafriends per il sociale*, at the Franco Parenti theatre of Milan, a series of meetings aiming at narrowing the gap between the needs of the non-profit sector and the competences and experiences of professionals in the communication sector. In the past five years, *Mediafriends Onlus* has promoted a long series of charity events, collecting and distributing approximately €35 million, which permitted the development of 143 solidarity projects in Italy and throughout the world. Amongst these were five editions of *La Fabbrica del sorriso*, the *Music for Asia* concert dedicated to the tsunami victims, the video-photographic exhibition *Un'onda di speranza*, the charitable auction *Venti di Striscia* at the Triennale of Milan and the fund raising activity organised during the Homage to Pavarotti concert held in Petra, Jordan, in October 2008. Moreover, *Mediafriends Onlus* has contributed to the development of Stanzallegria, a recreation room for young patients, in Italian children's Hospitals in an attempt to make hospitalisation less stressful. In collaboration with Focus magazine, *Mediafriends Onlus* launched several publishing initiatives for the environment. Their income are in favour of the preservation of the Argentine forest and the redevelopment of the Villa Gregoriana park in Rome.



Mediafriends Onlus



Social Campaigns / Charity Events > Spain



Grupo Antena 3: Ponle Freno

The Federation of Associations for People with Physical Disabilities and the City of Madrid named Grupo Antena 3 *Communications Medium of the Year* on the strength of its far-reaching road safety campaign, *Ponle Freno*. Grupo Antena 3 has initiated and massively supported the campaign with the aim of significantly reducing the number of traffic accidents and related deaths in Spain.



Cuatro (Sogecable): Match Against Poverty

As in previous years, the channel Cuatro gave up free airtime to humanitarian campaigns of various social organisations, such as Aisleme, Asociación Ayudemos a un Niño, Asociación Española de Esclerosis Múltiple, Fundación Alas, Fundación Ayuda Contra la Drogadicción, Fundación Gran Teatro del Liceo, Fundación Más Vida, Fundación Theodora, Infancia Sin Fronteras, Manos Unidas and Save the Children. These humanitarian campaigns took up a total of 6,480 seconds of airtime in 2007. Covering humanitarian events was also a priority on Cuatro, with the free broadcast of the 5th *Match Against Poverty*, played in Zaragoza's La Romareda Stadium between Friends of Zidane and Friends of Ronaldo, with significant media coverage throughout the country.

“As in previous years, the channel Cuatro gave up free airtime to humanitarian campaigns of various social organisations”



Social Campaigns / Charity Events > Poland



TVN: The Great Orchestra

TVN promotes Poland's most prosperous charity organisation to date – *The Great Orchestra of Christmas Charity*. In 2007, TVN joined the Polish public broadcaster TVP in co-producing a traditional annual telethon. Thanks to their mutual involvement, during the daylong live television broadcast in January 2008, *Great Orchestra* collected a record-breaking amount of over \$9 million. In January 2009, the charity event broke the record again reaching over \$10 million. A large number of TVN employees devoted the day to support the fund drive. During the 2009 telethon TVN presented and promoted similar initiatives existing in other European countries: Mediaset's *Mediafriends Onlus*, RTL Television's *Spendenmarathon*, ProSieben's *Red Nose Day*, bTV's *The Magnificent Six*, Turkish Kanal D's campaign, Sidaction and Telethon by France 2.



Great Orchestra of Christmas Charity

TVN: TVN Foundation Nie jestes sam

TVN's dedication in serving social purposes resulted in establishing the TVN Foundation *Nie jestes sam* (*You Are Not Alone*). Since January 2007, this distributed more than \$7 million to individuals and a number of projects including financial assistance to hospitals, orphanages, rehabilitation and medical centres. The largest single beneficiary of the assistance was the Child Health Centre Hospital. Every Tuesday TVN broadcasts a programme called *Zielone drzwi* (*Green Doors*), which portrays people and institutions supported by the Foundation. The Foundation also organises numerous charity concerts and sport events and *Kup misia* (*Buy a Teddy Bear*) action, enabling fund collection for sick children. TVN Foundation plans to commemorate its 10th anniversary in 2011 by building the first Cancer Prevention Centre in Poland. Between 2007 and 2009, the Foundation won several prestigious awards, among others the Pro Publico Bono Laurel and the Honourable Pearl of Polish Economy Award. <http://fundacjativn.onet.pl>

“TVN's dedication in serving social purposes resulted in establishing the TVN Foundation *Nie jestes sam* (*You Are Not Alone*)”



Social Campaigns / Charity Events > Belgium – Luxembourg



RTL Belgium and RTL Lëtzebuerg (RTL Group): Télévie

In its 21 years of existence, *Télévie* has become an institution in the fight against leukaemia and cancer. Behind this noble cause are the RTL family in Belgium and Luxembourg (since 2001) as well as many volunteers joining forces to collect funds. The 2009 edition of *Télévie* ended with a new record for donation pledges and the counter read more than €8.1 million.

The funds collected since the *Télévie* inception back in 1989 have now surpassed the symbolic €100 million mark, with the entire amount being turned over to scientific basic and clinical research. These donations make it possible for a hundred of scientists to work full time in cancer research, and it has shown to be a success. 90% of children leukaemia are now cured.



Social Campaigns / Charity Events > Belgium



SBS Belgium (ProSiebenSat.1 Group): Beter In Beeld

A competition for NGOs looking for the most powerful creative idea for an awareness campaign. Organised by SBS Belgium and the Belgian National Lottery, its winner receives an advertising campaign on VT4 and VIJFtv worth €100,000. At the same time, *Beter In Beeld* is looking for film students, who will shoot the winning idea with a budget of €40,000. After a successful first edition in 2008, *Beter in Beeld* was organised for the second time in spring 2009. The Centre for Prevention of Suicide has been announced as the winner of the 2009 competition - choosing the most daring idea and one, which made use of the medium TV in an innovative way. The jury also stated that the winning idea was most suitable with the target audience of VT4 and VIJFtv. In December 2009, the winning spot will be broadcast on the two TV channels. With this project, the ProSiebenSat.1 Group's Belgian channels dedicate themselves to improve the lives of struggling people, and to foster the elaboration of TV's creative and innovative potential.



Winning team - Beter In Beeld



VMMa: Levenslijn

In 2009, for the first time ever, VMMa has launched its annual CSR-project on a national basis in collaboration with the Belgian Government and the Belgian Institute for Traffic Safety. All visuals and spots have been produced in the 3 national languages: Dutch, French and German. Zeppe & Zikki, a zebra and a turtle, are the new central characters in the campaign around traffic safety. The two puppets encounter several dangerous situations and try to avoid them in an original and often extraordinary way, resulting in very funny situations. Zeppe & Zikki already appeared in twelve episodes (+/- 3 minutes), a combination of puppets and animation, and co-funded by the Flemish government. The series has been translated into French and 24 more episodes will be produced.



Levenslijn - Zeppe & Zikki



TV4: Nollrasism

The TV4 Group is working actively to contribute to a sustainable development, both as a responsible employer, but also regarding environmental and social responsibility in Sweden and around the world. To counter discrimination and prejudice, to seek to minimise environmental impact, and to help people in need around the world are among the most important tasks for the TV4 Group's CSR work. Over the years the TV4 Group – through e.g. fundraising campaigns and TV shows – has contributed to raising millions of Euro to organisations such as The Red Cross, Unicef, Plan International, SOS-Barnbyar, WWF, non-profit sport organisations and so on. One of the TV4 Group's most important CSR projects is *Nollrasism* (Zero Racism), having been going on for 12 years, and awarded internationally. Nollrasism main objectives are to stand up for the principal of human rights, to work against prejudice and discrimination, and to be a platform for fruitful discussions, about those issues in an open and democratic society.



Social Campaigns / Charity Events > Sweden



MTG: Increasing awareness of mental health and environment issues

MTG has chosen to focus its community work on increasing awareness of mental health and environmental issues by co-operating with local NGOs in the markets it is present. During 2008 MTG has among other things continued a successful collaboration with *Psykiatrifonden* in Denmark promoting youth's mental health, produced pro-bono promotional videos for mental health charity *Mind* in the UK and supported eight child mental health centres in Latvia. MTG has also newly started a co-operation with the WWF to increase public's awareness of climate change and other environmental issues. Other NGOs that MTG has chosen to collaborate with include the Cancer Fund, Lastekriis and UNICEF.

“MTG has chosen to focus its community work on increasing awareness of mental health and environmental issues”



Social Campaigns / Charity Events > Finland



MTV MEDIA

Charity campaigns, concerts and other cooperation took place with selected partners: the Association of Friends of the University Children's Hospitals, UNICEF Finland, the Mannerheim League for Child Welfare, the Young Finland Association and Finn Church Aid.



Social Campaigns / Charity Events > Croatia



RTL Televizija (RTL Group): RTL pomaže djeci

Established in 2006, *RTL pomaže djeci* (RTL Helps Children), the children's charity of RTL Televizija in Croatia, ran in 2008 a nationwide campaign called *Budi mi prijatelj* (Be My Friend) to raise donations for needy and disabled children. As the leading TV station in Croatia, RTL Televizija sees it as a priority to embrace its responsibility towards the Croatian society. RTL Televizija reports on deplorable social circumstances to build viewers' awareness for the children's needs, and raises donations with quick, straight-forward fund drives. The *Budi mi prijatelj* campaign collected more than €350,000 – an impressive tally for a country as small as Croatia.



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Social Campaigns / Charity Events > Romania



Prima TV (ProSiebenSat.1 Group): Stop the Indifference

A social campaign initiated by the newscast *Focus*, on Romanian ProSiebenSat.1 channel Prima TV. The goal is to raise awareness about current political and social problems in Romania by using the reach of TV as a force. The first step of the campaign was the project *Together we can find the missing children*, a media campaign regarding the growing problem of missing children in Romania and supported by the Romanian Centre for Missing and Exploited Children. The second step is the project *Health in a Coma*, aiming to raise awareness about problems of the Romanian sanitary system. Further projects will be developed.



Stop the Indifference



Pro TV (CME): International News Emmy Award and NAB International Broadcasting Excellence Award for Pro TV's social projects

As the leading voice in the Romanian media, Pro TV identifies the real problems of Romanian society and changes the mentality of authorities and civil society on issues hurting and blemishing Romania. Pro TV's message is about being responsible, getting involved and providing help to worthwhile causes. Over the last two years Pro TV has developed four major social responsibility campaigns:

- *STOP torturing the animals!* – Campaigning for the prevention of cruelty to animals
- *Any idea what your kid is doing right now?* – Protecting children whose parents have left Romania to work abroad
- *There is life after death* – Raising awareness of the importance of organ donation
- *Romania, the big land clearing* – Fighting to stop illegal forest cutting in Romania

STOP torturing the animals and *Any idea what your kid is doing right now?* brought about changes to government legislation in Romania and the other two campaigns led the authorities to pay attention to these very important social issues. In September 2008, Pro TV won an International News Emmy Award for *Any idea what your kid is doing right now?* and in March 2009, Pro TV was awarded the NAB International Broadcasting Excellence Award for its social campaigns.

“Pro TV's message
is about being
responsible, getting
involved and providing
help to worthwhile
causes”



ProTV (CME): Pro TV News - There's life in our blood

The Pro TV News campaign *There's life in our blood* focused on real issues and prompted the authorities to set up the *National Register of Unrelated Stem Cell Donors*, offering a new chance of life for hundreds of Romanians. The campaign is broadcast daily at 7 pm and has very successful audience shares with 30% (18-49 urban year-olds).



Social Campaigns / Charity Events > Bulgaria



bTV: The Magnificent Six

The most significant charity event for bTV in 2008 was the entire campaign of *The Magnificent Six*. Besides the show itself, there was a wide coverage of the concomitant events in the news and current affairs programmes of the station. In 2008 and until June 2009 there were 5 events for launching the construction and renovation of children's houses that are expected to be finished by the end of this year. bTV is a strategic partner of UNICEF, actively supporting the organisation's nationwide initiatives, such as the campaigns on anti-violence in schools, foster care, early child development, etc.



The Magnificent Six



bTV: Wake Up!

At the end of 2008, bTV and the Sofia Municipality initiated a fundraising campaign in favour of people in coma. The campaign *Let's Wake People in Coma* was launched on the occasion of the film by the reporter Valeria Chankova *Wake Up*, aired in November 2008 in the feature *bTV Reporters*. After a massive fundraising campaign on bTV, charity concerts, and extensive coverage in *bTV News*, by July 2009 the initiative gathered 177,000 leva that are being used for treating children in awake coma. With an audience share of 49,7%, the campaign was extremely successful, targeting the general audience and Government.



Wake Up! - Valeria Chankova

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VIII.4 Environment & CO₂

THE GROWING ACKNOWLEDGEMENT OF THE HUMAN IMPACT ON CLIMATE CHANGE HAS LED TO A GREATER RECOGNITION OF THE LINK BETWEEN CORPORATE ACTIVITY AND ENVIRONMENTAL CHANGE. IN THIS CONTEXT, MEDIA COMPANIES TAKE ACTION TO REDUCE THEIR OWN CARBON EMISSIONS AND ENCOURAGE THEIR AUDIENCE TO FIND SOLUTIONS TO PROTECT THE ENVIRONMENT.

Environment & CO₂ > France

Canal+: Happy Planet

In 2008, the Canal+ Group implemented the project *Happy Planet* - an awareness programme in the field of the protection of the environment. This programme aims at making Canal + Group an eco-responsible company and at positioning itself as the leading media on this subject. The defined measures concern the life of the company but also the way the Group produces its programmes, ensures their promotion and their consumption.

“Happy Planet - a programme in the field of the protection of the environment”

TF1: Ecoprod

Purchased programmes were the second largest source of greenhouse gases found by TF1's carbon assessment, after television set electricity consumption. At the end of 2008, with the help of its partners, the Group launched a campaign designed to help producers reduce greenhouse gas emissions, via a website with information on best practice and a carbon footprint calculator (simplified assessment modified for audiovisual productions). *Ecoprod* tools have been introduced to businesses operating in the sector in 2009.

“A campaign helping producers to reduce greenhouse gas emissions”



Social Campaigns / Charity Events > Greece



MEGA: MEGAMAZI

MEGA acts through CSR by broadcasting the programme *MEGAMAZI*. In 2009, these shows targeted areas such as the environment (*Earth Hour 2009*), health (*World Breast Cancer Day* and *Day Center Anasa*), food-related disorders, and humanitarian issues (*World Refugee Day*).



Social Campaigns / Charity Events > Turkey



Kanal D

Kanal D is the flagship of the sector when it comes to CSR. It has been the communications sponsor of the *Turkish Education Volunteers Foundation* (TEGV) since 2004 and, as it also did in 2008, it has served as a means not only of sharing the beliefs and mission of the foundation with the public but, through its special TEGV-Kanal D programmes broadcast on Kanal D, also as a means of generating revenue for the foundation. Kanal D's programmes and productions have served to publicise many social responsibility projects. These include: TEGV, the *Aydın Doğan Foundation*, *End Violence In The Family*, *Send Me To School Daddy*, the *Foundation for Children with Leukemia* (Lösev), the *Turkish Foundation for Combating Soil Erosion, for Reforestation and the Protection of Natural Habitats* (Tema), the *Turkish Red Crescent* and the *WWF*.

“Kanal D is the flagship of the sector when it comes to CSR”

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Environment & CO₂ > Luxembourg



RTL Group: environMINDday

For RTL Group, 2008 was an important year in establishing environmental concern as a major aspect of its business. In November 2008, CEO Gerhard Zeiler welcomed employees in Luxembourg to the first *environMINDday* with the message *Be part of the solution* – a rallying call for everyone involved in RTL Group to realise the power they have to make a difference. The event focused on the importance of small-scale improvements while emphasising the massive scale of the environmental challenges ahead. Activities on the day included film screenings, quizzes and workshops on topics such as *Buying Green*, an eco-driving competition, and eco-friendly choices in the company restaurant. Currently a wide-ranging process is underway to assess and quantify greenhouse gas emissions at all RTL Group subsidiaries. Further information can be found on the *environMind* website at: <http://environMIND.rtlgroup.com>.



“For RTL Group, 2008 was an important year in establishing environmental concern as a major aspect of its business”



Environment & CO₂ > Germany



ProSieben (ProSiebenSat.1 Group): Green Seven

On 22 April 2009 - the official *Earth Day* - ProSieben initiated *Green Seven*, a day dedicated to climate change. This raised awareness about urgent social and environmental problem, and at the same time celebrated the modern “green” lifestyle, which is also very popular among Hollywood celebrities and “hip” people. All day, the popular TV channel broadcast programmes dealing with environment and an ecology-aware lifestyle. On the occasion of *Green Seven*, the usually red ProSieben logo was coloured green all day. The idea was to combine a hip “lifestyle” topic, appealing to the ProSieben audience, with the important issue of climate change showing how to live ecologically and stylishly at the same time.



Environment & CO₂ > United Kingdom



BSkyB: Minimising impact and inspiring action

Sky's environment strategy is divided into two parts - minimising its own environmental impact through its products, operations and in its supply chain; and inspiring customers, employees and others to take action to reduce their impact on the environment too, by using programming and other communications, as well as through its partnerships with its environment partner *Global Action Plan*. In April 2009, Sky was awarded the *Carbon Trust Standard* for companies taking real action to reduce their carbon emissions. Sky's achievements were also recognised this year with a Green Award from the Federation of Communication Services and a Big Tick for Environmental Leadership from Business in the Community.

“Sky was awarded the Carbon Trust Standard for companies taking real action to reduce their carbon emissions”



MTV Networks International: Play to Stop – Europe for Climate

The EU Commission and MTVNI launched the *Play to Stop - Europe for Climate* campaign. The six months campaign is aimed at raising awareness among young people about the dangers of climate change whilst mobilising them in the run-up to the Climate Conference in Copenhagen in December 2009. *Play to Stop* targets 11 EU Member States and involves TV spots, a Moby concert in Stockholm, two concerts featuring other artists in Budapest and Copenhagen, webcasts and games, and editorial content about the battle against climate change. Throughout the campaign, young people have the opportunity to exchange opinions about climate change and the environment on the website at: www.mtvplay4climate.eu.



Environment & CO₂ > Spain



Cuatro (Sogecable): ¡Que desperdicio!

A show dedicated to helping Spanish households to save energy by giving them simple tips to minimise waste, encouraging a more efficient use of existing resources. The programme *Las Mañanas de Cuatro* launched an original initiative that combined entertainment and environmental awareness, challenging two towns in Zaragoza, Fuentedetodos and Jaulín, to see which could recycle more. Joining this mission was the programme *El Hormiguero*, ratings leader in its time slot, with an initiative to encourage viewers to plant trees. As of April 2007, 23,000 trees had been planted.

“A show dedicated to helping Spanish households to save energy”

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Sogecable: ECOTIC Foundation

Among other efforts on waste management within the company, Sogecable belongs to the ECOTIC Foundation, through which it manages the removal and recycling of its electrical and electronic equipment at the end of their life cycle. In the last year, Sogecable managed to recycle, with the help of this organisation, a total of 279,478 terminals, representing an investment of €39,044. Sogecable is also a member of the company Ecoembalajes España, S.A. (ECOEMBES), for the selective collection and recovery of container and packaging waste, for its subsequent treatment, recycling and monetary valuation.

“In the last year,
Sogecable managed
to recycle 279,478
terminals”



Environment & CO₂ > Poland



TVN: Moje Silne Drzewo

An ecological programme created in cooperation with [Onet.pl](#) and with the support of TVN channel and portal [Zumi.pl](#), explaining how the environment could influence health, strengths and moods. Main aims of the campaign were:

- To plant a million trees in the Beskids Mountains
- To carry out the national promotional campaign about the importance of planting trees and the protection of the environment
- To initiate local programmes and trainings about the protection of the environment, especially forest and water
- To create *Przyjaciele Drzew* (Trees Friends) activity promoting respect for the environment

Hosts of TVN's morning show *Dzien dobry TVN* (Good morning TVN) showed how to take care of trees and participated in trees planting in Beskids Mountains. In June 2009, the first edition of the programme finished. The main aim to plant million trees was achieved. Due to great interest in action a second edition of the programme was launched in September 2009. www.mojesilnedrzewo.pl

“An ecological
programme explaining
how the environment
could influence our
health, strengths
and moods”



Environment & CO₂ > Netherlands



RTL 4 (RTL Group): Clear Water for Every Child

In November 2008, RTL 4 devoted a whole week to Unicef's new environmental campaign *Clear Water for Every Child*, with both educational programmes and direct fundraising.



Environment & CO₂ > Finland



MTV MEDIA: Green MTV MEDIA

MTV MEDIA's ecological impact assessment was made in 2008 and the report included information about the ecological footprint as well as carbon dioxide (CO₂) emissions, recommendations for reduction in the use of environmental resources, and a brief comparison with other service sector organisations. Energy consumption and transport constitute the biggest proportions of the total ecological footprint of MTV MEDIA. The main actions taken after the *Green MTV MEDIA* assessment were ensuring the procurement of green electricity and advising personnel to shut down their computers when not working. An environmentally friendly company car policy is also being planned.

“Focusing on
reducing the use
of environmental
resources”



Environment & CO₂ > Bulgaria



bTV: Global Warming

bTV is an environmentally responsible company, following the global policy of News Corporation, and observes a policy for decreasing CO₂ emissions in its building. Besides, bTV supports significant eco initiatives with news announcements and pro bono video clips, so that their messages reach the widest possible audience of TV viewers and Internet users, and to direct the audience's attention to the problems with global warming. The station is a media partner of the national initiatives of the WWF, and other prominent organisations with activities in Bulgaria. Every year bTV employees, together with friends and families, plant trees in the Vitosha mountain, to restore the damages by a tornado in 2001. bTV has a special section in its website - *Global Warming* - where users can find information about problems and how to solve them.



VIII.5 Ethical Journalism

INDEPENDENCE OF SPIRIT AND ENQUIRY ARE THE FUNDAMENTALS OF JOURNALISM. TRANSPARENT AND RESPONSIBLE EDITORIAL POLICIES IN NEWS ROOMS ARE AT THE FOREFRONT OF AN UNBIASED AND DIVERSE MEDIA OUTPUT.



Ethical Journalism > France



TF1: Freedom and Responsibility seminars

The Director of News guarantees the independence of the editorial team, through dialogue and discussion. The editorial team pays particular attention to the quality of picture sources, and amateur videos are banned in so far as the source cannot be properly checked. *Freedom and Responsibility* seminars, during which reporters are reminded of the legal conditions with which they must comply, are regularly organised for all staff involved in producing reports for TF1 news bulletins.



Ethical Journalism > United Kingdom



BSkyB: Sky News

Sky News has been providing independent, impartial coverage since it launched in 1989 as the UK's first dedicated 24-hour news channel. The fundamentals of journalism are independence of spirit and enquiry. News reporting, in whatever form, should be dispassionate and provide viewers with an even-handed account of events. Sky News is the only organisation in the UK, which does TV news because it chooses to, without privilege, obligation or subsidy. Sky News values its independence of funding. The broadcaster invests in news because it believes its customers want it and they value Sky's independence. Sky relies on the judgement and experience of producers and editors to make the right decisions quickly. Sky operates a 'referring up' system, so producers can get on-the-spot advice from senior staff including the Head of Sky News. All Sky's News teams are expected to be familiar with UK media law and the Ofcom Broadcasting Code, and Sky's own editorial guidelines and these are covered in the induction process for new staff.

SKY NEWS

“The Director of News guarantees the independence of the editorial team”



Ethical Journalism > Bulgaria



bTV: bTV Reporters

bTV regularly covers and investigates social issues and problems in its feature *bTV Reporters*, where the station's top reporters delve into various up-to-date topics. Many documentaries about topics such as abandoned children or health issues, were broadcast since 2008. bTV was also the only station to broadcast BBC's notorious documentary film *Bulgaria's Abandoned Children*, alongside other documentaries on social issues, provided by external authors.



bTV - Valeria Chankova



Ethical Journalism > Turkey



Kanal D

The Kanal D News Team gives great importance to ethical news reporting. It ensures that its approach to and presentation of events are always unbiased and comply with ethical standards.

“Great importance to ethical news reporting”

IX AWARDS



Whether it is at the national or international level – commercial broadcasters have received a **great variety of awards in different categories**, including awards for news programmes, fiction, entertainment channels or short film awards.

But it also covers prizes for the best IR-work, freedom of speech, CSR activities or high-quality programming in general.

The European commercial broadcasters look back to an **active, socially-engaging and successful year of television** – be it in the business itself, in the production or distribution of content.



Awards > France



M6: Best Television Network Award

In June 2009, M6 received the *Best Television Network Award* at the 11th annual *Grand prix des médias CB News* in Paris. The media to receive this award are in the news and editorial category, including television, press and radio. This award follows on the heels of another success, an overwhelming vote by the public this time, when in March 2009 M6 was voted *Favourite Network of the French* in the Harris Interactive opinion survey. The survey was carried out with 1,000 individuals over the age of 15 who are representative of the French population.

“Best Television Network Award”



TF1: Most-watched French channel

In 2008, TF1 Group held the number 1 position in many of its activities. With 96 of the year's 100 biggest TV audiences, TF1 was the most-watched channel in France. TMC, TF1 Group's DTT channel finished the year as the most-watched DTT channel and TF1 Network generated the highest traffic for a media website. Diversification activities experienced a successful year as well, TF1 Games being the number 1 board games distributor and TF1 Video holding the position in the category DVD distributor. Eurosport was acknowledged as the most-watched European channel throughout the year and the number one European website dedicated to sports and Europe's leading multimedia platform.

“Most-watched French channel”



Awards > Luxembourg



RTL Group: Model of Excellence Prize

In April 2009, RTL Group was awarded the *Model of Excellence Prize* at the 6th *European Conference on Promoting Workplace Health* in Perugia, Italy. 300 participants from 25 European countries attended the conference, which focused on lifestyle-related workplace health promotion and addressed topics such as smoking prevention, healthy eating and stress management.

“Model of Excellence Prize”

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Awards > Germany



N-TV (RTL Group): Young Global Leader Award

In Geneva in March 2008, N-TV presenter Carola Ferstl was awarded for her efforts in the area of *Financial Education*. The *Young Global Leader Award* is presented annually by the World Economic Forum, commending the world's leading 200 to 300 young personalities for their professional achievements, their commitment to the community and their contribution to shaping the global future.

“Young Global Leader Award”



Awards > United Kingdom



BSkyB: Entertainment Channel of the Year

In 2008, Sky1 won the title of *Entertainment Channel of the Year* at the *Broadcast Digital Channel Awards*, receiving acclaim for its “noisy, cut-through programming”. Supported by its sister channels Sky2 and Sky3, Sky1 is part of a family of channels offering a diverse mix of entertainment for its customers.

“Entertainment Channel of the Year”



BSkyB: News Channel of the Year

For the sixth time in seven years, Sky News was named *News Channel of the Year* by the Royal Television Society in 2008. In addition, BSkyB's Asia correspondent, Alex Crawford, received the accolade of *TV Journalist of the Year*.

“News Channel of the Year”



Nickelodeon (MTV Networks International): UNICEF UK Short Film Award

See Something Say Something was awarded the *UNICEF UK Short Film Award* at the *Showcomotion Young People's Film Festival*. Nickelodeon launched this in 2006 with a documentary special, produced by BAFTA award winning production company *Wised Up*. The special features kids talking candidly about their bullying experiences and it invites kids to contact Nickelodeon with their success stories. The 2009 *See Something Say Something* anti-bullying campaign comprises of four short films made in conjunction with children's charity *ChildLine*. The short animations, aired on Nickelodeon channels, are from the viewpoints of the bully, the victim and the witness.



Nickelodeon



ITV: High-quality programming rewarded

In 2008, ITV was awarded several prizes for its efforts in programming. In October 2008, *Benidorm* won the *Most Popular Comedy Programme* at the *National Television Awards*. In November 2008, *Headcases – ITV Productions / Red Vision* for ITV won the *RTS Design and Craft Innovation Award* and the *Writers Guild* awarded the writers of *The Bill* the award of *Best Soap / Continuing Drama Series*. *Harry Hill's TV Burp* won the *British Comedy Award for Best Comedy Entertainment Programme* in December 2008.

“High-quality programming rewarded”



Awards > Spain



Antena 3 TV: TP de Oros Television Award

In Antena 3 TV won four *TP de Oros* at the 36th prestigious *TP de Oro Television Awards* in Madrid on 13 February 2008. Matías Prats received his fifth consecutive *TP de Oro* award for *Best News Presenter*, securing his spot as the winner of the most *TP* awards ever. *Antena 3 Noticias 2* won its fourth consecutive award for *Best Daily News*. The edition presented by Matías Prats won awards in 2004, 2005 and 2006.

“TP de Oros Television Award”



Awards > Poland



Canal+ Cyfrowy: Magellan Award for Community Relations

Canal+ Cyfrowy with the PR agency *Alert Media Communications* was awarded in this year's *Magellan Awards International PR Contest*. The company won the *Magellan Award* in the category of *Community Relations* for the CSR project of media education for secondary students *MediaStarter*, executed by *Alert Media Communications* for Canal+ Cyfrowy.

“Magellan Award for Community Relations”

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TVN: Best Investor Relations

In October 2008, TVN Group was awarded as the media company having the best Investor Relations in Europe. The ranking by *Institutional Investor* placed TVN Group on top of all European media companies. The *European Equities Investor Relations* is a prestigious survey verifying both, quality and effectiveness of Investor Relations communications in 30 categories. It is based on a survey of more than 1,350 sell-side analysts who evaluate the quality of the companies' Investor Relations communications.



TVN: Best Managed Media Brand

In January 2009, TVN was named the *Best Managed Media Brand* in Poland. In a study conducted from March 2008 until December 2008 marketing specialists pointed the best managed brands in 10 categories. TVN was acknowledged the best managed brand in the media category. The research was conducted by Marketing & More Monthly, Researcher by Call Center Poland and Panorama Firm.



TVN: Freedom of Speech Award

In December 2008, Ewa Stankiewicz and Anna Ferens - the authors of the *Trzech kumpi* (*Three buddies*) documentary produced by TVN, were awarded with the Polish Journalist's Association's *Freedom of Speech Award*. The reportage of TVN's journalists Przemysław Wojciechowski and Witold Gadowski was acknowledged to be the best in the *Investigative Material Category*. The Polish Journalist's Association's Award, is a Polish equivalent of the *American Pulitzer Prize*.



TVN: Wladyslaw Grabski Award

In June 2008, TVN CNBC Biznes channel was presented *Wladyslaw Grabski Honorary Award* by the President of the National Bank of Poland. The business channel has been acknowledged for its broad variety of topics, understandable language, high quality of programmes and professionalism of the editorial team. Rafal Hirsz of TVN CNBC Biznes was recognized as best economically-oriented journalist. The survey aims to recognise journalists, who through their work contribute to the development of a general economic knowledge in society.

“Best Investor Relations”

“Best Managed Media Brand”

“Freedom of Speech Award”

“Wladyslaw Grabski Award”



Awards > Belgium



VMMa: International Awards for Belgian Fiction

VMMa's programmes, and especially fiction, were awarded with several prizes in 2008. *Sara* was acknowledged the most popular TV programme and its main character got the award of the *Best Actress* as well as the *Most Popular Television Personality*. *Aanrijding in Moskou* won three awards at the Cannes Film Festival and was also rewarded at the Denver International Film Festival, the European Film Awards, the Sao Paulo International Film Festival, the World Soundtrack Awards and the Zurich Film Festival. *Dennis van Rita* won the award for *Best Actress* and *Best Script* at the Shanghai International Film Festival.

“International Awards for Belgian Fiction”



VMMa: Most Innovative Legal Department Award

The legal department of VMMa won the award of *Most Innovative Legal Department of the Year* in 2008.

“Most Innovative Legal Department Award”



Awards > Sweden



TV4: Best Original Logo

TV4's environmental campaign *Klimatsmart* won the Gold Medal of the *Best Original Logo* design at the Promax Awards.

“Best Original Logo”



Awards > Finland



MTV MEDIA: Finnish Journalist Award

On 10 June 2009, Risto Pohjanpalo, Editor-in-Chief Multimedia MTV3 News, received the Finnish Journalist Award.

“Finnish Journalist Award”



MTV MEDIA: K-70 (Born to Be Wild)

In 2008, MTV3 broadcast a new type of show, *K-70 (Born to Be Wild)*, in which a group of people all aged 70+ took part in vigorous training to form a choir performing various rock classics, to end with a massive concert. The series sparked wide debate and brought the oldest members of the population forward in a new light. The show received several awards, including *Format Finland*, the award promoting awareness of Finnish formats and the *Award for Best Finnish Reality-TV Series* as well as voted *Best Factual Entertainment Show* at the *International Format Awards* at MIPCOM 2008 in Cannes.

“Best Factual
Entertainment Show”



MTV MEDIA: Venla Gala

Sub's *Ketonen&Myllyrinne* got the award for *Best Comedy* at the Annual Venla Gala for Best TV Programming in Finland in January 2009. At another annual Finnish TV event, the Golden TV Awards, Sub's extreme travelogue, *Madventures*, got the award for *Best Finnish TV Programme* in 2008, and MTV3's *Dancing with the Stars* got the award for *Best Entertainment and Music Programme*.

“Best Finnish TV
programme”



Awards > Bulgaria

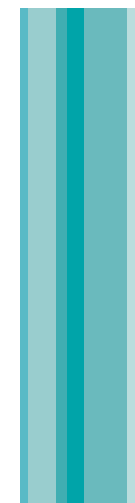


bTV: International Peabody Prize

In September 2008, bTV won the award for *Socially Responsible Media* in the contest organised by Partnership for CSR and Pari daily newspaper. In January 2009, the project *The Magnificent Six* received the award *Worthy Bulgarian* from 24 hours daily newspaper, and in March 2009, bTV won the award *Favourite Trademark of the Bulgarians* in 2008 in category Media. In April 2009, the association *Intellectual Property* awarded bTV with a special diploma for the station's consistent corporate policy with regard to IPR. More than 10 reporters from bTV newsroom won prestigious awards since 2008 for their reportages and films, broadcast in bTV news and current affairs programmes. The most significant award for bTV in 2008 - the *International Peabody Prize* - went to bTV anchor and producer Venelin Petkov for his film *Opium and Roses*, part of his documentary sequence *A Journey Across Afghanistan*.



Venelin Petkoc - Peabody award



of Commercial Television in Europe

X ACT MEMBERS



European diversity is not just a phrase; it is what viewers can watch on a daily basis when tuning in to watch the variety of European channels every day.

While the EU has 27 members, the ACT is active in 34 European countries, thus even going beyond the borders of the Union. Based on the difference of the national media markets, TV content differs widely among the markets and is adapted to **local tastes**.

Overall **viewing time** for television varies between the countries, however, in general people tend to watch more, not less, television and our viewers also value the vast variety of creative content offered to them by commercial broadcasters all over Europe.



France

- 25.28 million TV households in total
- Analogue switch-off to be completed by November 2011
- Digital TV penetration in 2008: 57.8% of TV households
- World's largest IPTV market and one of the world's most competitive and technologically advanced TV markets
- Average daily viewing time: 204 minutes in 2008 (4+ year-olds)
- Share of all-day viewing by channel (%)

	TF1	France2	France3	M6	France5	Canal+	Arte	Others
2008	27.2	17.5	13.3	11	3.3	3.3	1.8	22.6

- TV advertising 2007: 39.4% of total advertising expenditure = €6,700 million

(Source: CSA, SNPTV and Médiamétrie)



CANAL+ Group (France)

The Canal+ Group is the leading Pay-TV Group in France. It is the leader in production of premium and specialised channels and has 10.6 million subscribers to its offers. A pioneer in new uses of television, it is also a major player in film production and distribution.

- Leading Pay-TV operator in France available on DTT, satellite, cable and ADSL networks
- 10.6 million subscribers
- Audience Canal+ channel: 4.2% (+ 13% compared to 2007), 4+ year-olds
- Owner: Vivendi
- Launched in 1984
- Chairman of the Executive Board: Bertrand Meheut
- 2008 Revenues: €4,554 million / 2008 EBITA: €568 million
 - Breakdown of Canal+ channel's revenues: 90% subscription; 7% advertising; 3% other
- 780 full-time employees at the Canal+ channel only; 4,252 at Canal+ Group
- Website: www.canalplusgroupe.com



Bertrand Meheut

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The channels' offer

Films, sports, information, comedy and drama series, documentaries and more: Les Chaînes Canal+ offer exclusive, original entertainment for all interests via five general Premium channels: *Canal+*, *Canal Cinema*, *Canal+ Sport*, *Canal+ Family* and *Canal+ Décalé*.

In 2008, the Canal+ channel broadcast 400 movies and more than 35 previously unaired films every month - for its 5.3 million subscribers.

The Canal+ Group also produces a range of some 20 special-interest channels dedicated to viewers' favourite themes, including film (*Cinéma channels*), sports (*Sport+*, *InfoSport*), news (*i>Télé*), documentaries (*Planète channels*), lifestyle (*Cuisine TV*, *Seasons*), TV series (*Jimmy*, *Comédie!*) and children's programmes (*Piwi*, *Télétoon*).

The Canal+ Group internationally

Canal Overseas, a wholly-owned subsidiary of Canal+ France, is the operator of Canal+ and CanalSat in the French overseas territories and departments and in sub-Saharan Africa. The only French overseas network, *Canal Overseas*, operates four satellite platforms (Africa, Caribbean, Indian Ocean and Pacific) covering a potential worldwide audience of 500 million individuals and two-thirds of all French-speaking territories. Through its Multi TV Afrique subsidiary, *Canal Overseas* also produces the Canal+ Horizons and Canal+ Essentiel channels.



M6 Group (France)

Established in 1987 around the M6 Channel, over the years the Metropole Télévision Group has become a powerful multimedia group offering a wide selection of programmes, products and services, which are available across the most diverse range of media: television, Internet and mobile phone, etc. In 2009, the *M6 channel* was named the most preferred channel by 30.8% of French viewers and by 41.3% of under 50 viewers (source: Harris Interactive, May 2009).

- Second Free-to-air commercial channel
- Audience: 11% (4+ year-olds); 17.5% (under 50 year-olds housewives)
- Majority shareholder: RTL Group (48.55%)
- Launched in 1987
- Chairman of the Board: Nicolas de Tavernost
- 2008 Revenues: €1,354.9 million / 2008 EBITA: €194 million
 - Breakdown of revenues by segments: 49.1% M6 Network; 9.2% Digital TV; 41.7% Diversification and audiovisual rights
 - Advertising revenue: 55.6%; non-advertising revenues: 44.4%
- 1,719 full-time employees
- Website: www.groupeM6.fr

M6 Group has substantial interests in no fewer than ten theme channels and a wide array of media-related businesses, ranging from publishing, music, homeshopping, websites, mobile phones (M6 mobile) to rights and film distribution. M6 Group is also the owner of the *Girondins de Bordeaux Football Club*, which finished first place in League 1 for the 2008-2009 season.



TF1 Group (France)

TF1 Group is a 360° integrated communications group composed of the French leading Free-to-air channel (*TF1*) and of 13 theme channels, including Eurosport, present on all platforms (cable, satellite, ADSL or/and DTT).

- Leading Free-to-air commercial TV channel
- Audience: 27.2% (4+ year-olds); 30.9% (under 50 year-olds women)
- Majority shareholder: Bouygues (43%)
- Launched in 1987 (Privatised in 1987)
- CEO: Nonce Paolini
- 2008 Revenues: €2,595 million / 2008 Current Operating Profit: €177 million
 - TF1 channel Advertising revenue: €1,647 million (63%)
 - TF1 diversification revenues : €948 million
- 3,731 full-time employees
- Website: www.tf1finance.fr



Nonce Paolini

Building on its original business of programmes' producer and broadcaster, TF1, has created new activities with strong added value, covering the whole of the audiovisual industry: upstream in production, acquisition and sale of audiovisual rights and also in distribution of feature films to cinemas, downstream in publishing and distribution of DVDs and music CDs. TF1 is also expanding in home-shopping TV. TF1 Group is the Internet's leading media group and the 8th biggest player on the French Internet in 2008, with over 15.7 million unique visitors. The TF1 Group reaches one out of every two Internet users and has become a multimedia content producer by developing and publishing content and interactive services on the Internet and on mobile channels.



Nicolas de Tavernost



Luxembourg / Germany / Austria

Luxembourg

- 0.18 million TV households in total
- Analogue switch-off to be completed by 2011
- Digital TV penetration 2007: 63% of TV households
- Multilingual population with 40% of the country's residents being foreigners
- Average daily viewing time: 155 minutes in 2007 (12+ year-olds)
- Share of all-day (Mon-Fri) viewing by channel (%)

	RTL Lëtze- buerg	TF1 (France)	RTL Television (Germany)	ZDF	ARD	Pro7	M6	France2	Sat1	RTP Inter (Portugal)
2008	34.1	16	14.3	13.9	13.4	13	9.8	7.8	7.4	7

(Source: TNS-ILReS Plurimedia, 2008)

Germany

- 35.3 million TV households in total
- Analogue switch-off completed in November 2008
- Digital TV penetration 2008: 34.2% of TV households

	ARD	ARD Dritte (regional)	ZDF	RTL	Sat.1	Pro- Sieben	RTL II	VOX	kabel eins	Super RTL
2008	13.4	13.2	13.1	11.3	10.3	6.6	3.8	5.4	3.6	2.4

- TV advertising: 45% of total advertising expenditure = €20,200 billion

(Source: AGF/GfK and Informa TV International)

Austria

- 3.37 million TV households in total
- Analogue switch-off to be completed by 2010
- Digital TV penetration 2007: 56.9% of households

	ORF2	ORF1	Sat.1	RTL	ProSieben	ATV	Puls4	Others
2008	25.1	16.8	7.3	5.6	4.8	3	1.2	36.2

- Share of all-day viewing of foreign channels 2007: 53.3%
- Share of all-day viewing of foreign channels with Austrian content 2007: 28%
- TV advertising expenditure 2008: €2,703 million

(Source: AGTT/GfK, European Audiovisual Observatory Yearbook 2008 and Informa TV International)



RTL Group (Luxembourg – Europe)

The company's history dates back to 1931 when the Compagnie Luxembourgeoise de Radiodiffusion (CLR) was founded. With 46 television channels and 30 radio stations in 11 countries, RTL Group is the leading European entertainment network. The Luxembourg-based media group is one of the world's leading producers of television content such as talent and game shows, drama, daily soaps and telenovelas, including *Pop Idol*, *Got Talent*, *The X Factor*, *Good Times – Bad Times*, *Family Feud* and *The Bill*.

- Leading European Free-to-air commercial channels
- Majority shareholder: Bertelsmann AG (90.5%)
- Created in 2000 after the merger of CLT-UFA and Pearson TV
- CEO: Gerhard Zeiler
- Audience 2008:
 - 32.9% in Germany (aggregated, 14-49 year-olds), 32.6% in Hungary (18-49 year-olds), 30.5% in The Netherlands (aggregated, 20-49 year-olds), 26.4% in Croatia (18-49 year-olds), 36% in Belgium (aggregated, 18-54 year-olds)
 - 17.5% in France (under 50 year-olds housewives), 17.4% in Spain (13-55 year-olds)
 - 6.2% in the UK (aggregated, 16+ year-olds) and 5.4% in Russia (18-54 year-olds)
- 2008 Revenues: €5,774 million / 2008 EBITA: €916 million
 - Breakdown of revenues by segments: 76.1% TV; 21.7% Content; 5.8% Radio; 1.1% Other; (4.7%) Eliminations
 - Breakdown of revenues by sources: 63% Advertising; 23% Content; 14% Diversification
- 9,191 full-time employees
- Website: www.rtlgroup.com



Gerhard Zeiler

RTL Group is Europe's largest broadcaster. Each day, over 200 million viewers all over Europe watch RTL Group's television channels, which include the families of channels clustered around the flagships *RTL Television* in Germany, *M6* in France, *RTL 4* in The Netherlands, *RTL-TVI* in Belgium, and the young *Five family* in the UK. The company also has broadcasting operations in Greece (*Alpha Media Group*), Hungary (*RTL Klub*), Russia (*Ren TV*) and Croatia (*RTL Televizija*).

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ProSiebenSat.1 Group (Germany – Europe)

The ProSiebenSat.1 Group is Europe's second-largest broadcasting group, reaching more than 78 million TV households. Free TV is its core business. Beyond commercial TV its portfolio includes numerous industry-related activities: The ProSiebenSat.1 Group owns several online brands, has stakes in radio-, print- and New Media companies and operates in music, live-entertainment and artist-management. The Group uses this multi-platform strategy to strengthen its market position in the entertainment industry and to gain access to new fields and additional sources of revenue independent from TV advertising. The company is a stock-oriented incorporation. Headquartered in Unterfoehring near Munich, it employs over 5,000 people throughout Europe and generated revenues of EUR 3.1 billion in 2008.

- Second largest pan-European Free-to-air commercial provider with 78 million TV households
- Audience:
 - Germany: 29,4 %
 - Austria: 15,7 %
 - Switzerland: 17,6 %
 - The Netherlands: 18 %
 - Belgium (Flanders): 27,1 %
 - Hungary: 24,6 %
 - Romania: 6,9 %
 - Sweden: 14,5 %
 - Denmark: 13,2 %
 - Norway: 15,1 %
- Majority shareholder: Lavena Holding companies, which are controlled by funds advised by Kohlberg Kravis Roberts & Co. L.P. (KKR) and Permira Beteiligungsberatung GmbH (Permira)
- Created in 2000
- CEO: Thomas Ebeling
- 2008 Revenues: €3.1 billion / 2008 recurring EBITDA: €675 million
 - Breakdown of revenues by business unit: 82.9% Free TV; 17.1% Diversification
 - Breakdown of revenues by region: 64.8% in German-speaking Europe; 16.1% in Nordic countries; 13.7% in Belgium and The Netherlands; 5.4% in the CEE region
- More than 5,000 full-time employees
- Website: www.prosiebensat1.com



Thomas Ebeling



Sky Deutschland (Germany – Austria)

The new Sky TV entertainment service launched in July 2009 with a new general entertainment package, *Sky Welt*. This comprises 20 channels that offer the best of local and international programming, including great entertainment from *Sky Krimi*, *Fox*, and *TNT Serie*. The expanded documentary line-up includes *Motorvision TV*, *Spiegel Geschichte*, *Discovery Channel*, *National Geographic Channel* and *National Geographic Wild*. The package also has kids programming for all age groups with the *Disney Channel*, *Playhouse Disney*, *Jetix* and *Junior*.

- Leading Pay-TV operator in Germany and Austria
- 2,399,000 subscribers
- Majority shareholder: News Corporation (39.96%)
- Launched in 2009 (formerly known as Premiere, launched in 1991)
- CEO: Mark Williams
- 2008 Revenues: €941.1million / 2008 EBITDA: € (57) million
- 1,091 full-time employees
- Website: <http://www.sky.de>

The new service also offers German and Austrian customers the first comprehensive HD service with six channels available at launch: *Sky Cinema HD*, *Disney Cinemagic HD*, *Sky Sport HD*, *National Geographic HD*, *History HD* and *Discovery HD*. Additionally, Sky launched with an all-new package for movie lovers, *Sky Film*, the most comprehensive sports package on German-language TV with *Sky Sport* and the best Bundesliga coverage with the *Sky Fußball Bundesliga* package.



Mark Williams



United Kingdom / Ireland

United Kingdom

- 25.5 million TV households in total
- Analogue switch-off to be completed by March 2013
- Digital TV penetration 2008: 88.8% of TV households
- Average daily viewing time: 233 minutes in 2007 (16+ year-olds)
- Share of viewing time by channel (%)

	BBC1	BBC2	ITV	C4 + S4C	C4 +1	Five	Others
2008	21.8	7.8	18.4	7.5	0.7	5	38.8

- TV advertising (2008): £3,471 million

(Source: OFCOM and Barb)

Ireland

- 1.46 million TV households in total
- Analogue switch-off to be completed by end 2012
- DTT to start by end 2009
- High Pay-TV penetration: 74.9% of TV households in September 2008
- Average daily viewing time: 188 minutes in 2007 (15+ year-olds)
- Share of viewing time by channel (%)

	RTE 1	RTE 2	TV3	TG4	BBC1	UTV	C4
2008	23.4	10.6	12.1	2.5	4.8	4.8	3.3

(Source: Comreg, AGB Nielsen and Informa TV International)



BSkyB (UK – Ireland)

Sky is the UK's leading entertainment company and operates the most comprehensive multichannel, multiplatform TV service in the UK and Ireland. Sky owns and operates channels including *Sky One*, *Sky News*, *Sky Arts*, *Sky Real Lives*, *Sky Sports* and *Sky Movies*. Since its launch in 1989, Sky has been the first to go digital, the first to offer interactive red button services, the first to offer an integrated personal PVR, and the first to offer HD services across the UK. Sky also offers the UK's fastest growing broadband (*Sky Broadband*), home telephony (*Sky Talk*) services, and mobile TV service (*Sky Mobile TV*).

- 9,318,000 million subscribers
- Audience Sky channel: 4.2% (+ 13% compared to 2007), 4+ year-olds
- Majority shareholder: News Corporation (38%)
- Launched in 1989
- CEO: Jeremy Darroch
- 2008 Revenues: £4,952 million / 2008 Operating Profit: £724 million
 - Breakdown of revenues by sources: 63% Advertising; 23% Content; 14% Diversification
- 16,000 full-time employees
- Website: <http://corporate.sky.com>



Jeremy Darroch

There are 15 channels dedicated to religion and faith, 27 children channels, 47 services for foreign and ethnic audiences, and 14 dedicated news channels on the Sky Platform. Contribution to entertainment and arts is a reality on Sky Arts with 550 hours of arts programming broadcast each month. And last but not least, 40,000 hours of sports coverage and analysis are broadcast every year.



Five (UK)

Originally called *Channel 5*, the station rebranded itself as *Five* in 2002. Five Group's brands include the original channel Five, the digital channels Fiver and Five USA, the VOD service Demand Five and Five.tv.

- 6.2% of audience share in its target group (including Fiver and Five USA)
- Owner: RTL Group
- Launched in 1997
- Chairman and CEO: Dawn Airey
- 2008 Revenues: €432 million / 2008 EBITA: €(2) million
- Website: www.five.tv



Dawn Airey

In June 2008, *Five* announced an exclusive three-year deal with UEFA for the 2009 to 2012 UEFA Europa League (formerly the UEFA Cup). 2008 was also marked by ongoing brand refresh work across all of Five's channels. In October, the main channel launched its new on-air identity and logo, supported by a TV campaign, while in the digital arena, *Five Life* was relaunched as *Fiver* in April 2008. Fiver's ratings showed a 33% increase in audience share when comparing the period May to December 2008 with the same period in 2007.

The rebranding of the channels was completed in February 2009, with Five US being relaunched with an enhanced schedule as Five USA. In the first half of 2009, both digital channels experienced growth during the period. Within multichannel homes, the digital channel portfolio grew 16% year on year.

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ITV (UK)

ITV is both the largest commercial broadcaster and the largest advertising funded media owner in the UK, investing around £800 million per annum in original content. ITV programming covers a full range of genres including drama, entertainment, news, current affairs, factual and sport. Programmes are provided by ITV's in house production unit, ITV Studios – the largest commercial production company in the UK, as well as the independent production sector.

ITV1 is the leading commercial channel in the UK, reaching 22 million people in the UK on an average day. ITV's digital channels are the most watched digital channels in the UK with ITV2, ITV3 and ITV4 ranking 1st, 2nd and 10th respectively.

- ITV1 is the leading commercial broadcaster in the UK
- Audience share in 2008: ITV1: 17.2% (all time), 23.9% (in peak)
- Launched in 1955
- Executive Chairman: Michael Grade
- 2008 Revenues: £2,029 million /2008 EBITA: £211 million
 - Breakdown of revenues by segments: £1,647 million Broadcasting; £306 million Global Content; £36 million Online; £40 million Other
- 4,500 employees
- Website: www.itv.com, www.itvplc.com

Online, ITV is focused on video services delivering ITV programmes. ITV.com includes the *ITV Player* which allows users to access Catch-up and watch clips from the best ITV programmes. ITV.com continues to reach more viewers month on month. 100 million videos were watched on ITV.com in the first half of 2009.



MTV Networks International (UK – Europe)

MTVNI includes the premier multimedia entertainment brands *MTV: Music Television*, *VH1*, *Nickelodeon*, *MTVNHD*, *TMF (The Music Factory)*, *VIVA*, *Comedy Central* and *Game One*. MTV Networks' brands are seen globally in 592 million households in 161 countries and 33 languages via 172 locally programmed and operated TV channels and more than 400 digital media properties. The company's diverse holdings also include interests in television syndication, digital media, publishing, home video, radio, recorded music, licensing & merchandising and two feature film divisions, *MTV Films* and *Nickelodeon Movies*. MTV Networks is a unit of Viacom Inc. (NYSE: VIA, VIA.B). MTVNI's European channels include: *MTV One*, *MTV Base*, *VH1*, *MTV France*, *MTV Idol*, *VH1 Euro Classic*.



TV3 (Ireland)

TV3 is the only privately owned terrestrial Free-to-air national commercial TV channel in the Republic of Ireland. Since the launch in September 1998, TV3 has become the second most viewed channel in the Republic of Ireland.

- Leading commercial broadcaster
- Owner: Doughty Hanson and Co.
- Launched in 1998
- CEO: David McRedmond
- Website: www.tv3.ie

TV3 provides viewers with a wide range of programming across the entire schedule, including soaps, drama, news and premium sport and has an average peak time market share of 15% of its target 15 – 44 year-olds audience. In 2008, TV3 acquired *Channel 6* and launched its website TV3.ie.



Michael Grade



David McRedmond



Spain / Portugal

Spain

- 17.5 million TV households in total
- Analogue switch-off to be completed by April 2010
- Digital TV penetration 2008: 43.7% of TV households
- Very strong Free-to-air analogue terrestrial sector with 6 national networks,13 regional broadcasters (FORTA) and 1,000 local stations
- Average daily viewing time: 234 minutes in 2007 (16+ year-olds)
- Share of all-day viewing by channel (%)

	Telecinco	TVE1	Antena3	Cuatro	La Sexta	La2	FORTA	Others
Jan-Oct 2008	18.4	16.7	16	8.8	5.3	-	-	-
Dec 2008	-	-	-	-	-	4.7	14.1	16

(Source: Sofres, Informa TV International)

Portugal

- 5.6 million TV households in total
- Analogue switch-off to be completed by 2013
- DTT launched in April 2009
- Average daily viewing time: 216 minutes in 2007 (15+ year-olds)
- Share of all-day viewing by channel (%)

	RTP1	RTP2	TVI	SIC	Cable channels	Others
2008	23.8	5.6	30.5	24.9	13.8	1.4

(Source: Marktest, Informa TV International and TVI)



Grupo Antena 3 (Spain)

Grupo Antena 3 is very well positioned within the Spanish audiovisual market, thanks to the innovation and success of its programmes, the rigour of its News Programmes and the skills of its professionals. *Antena 3 TV* currently broadcasts its signal throughout the whole Spanish Territory and, through its international channel, it reaches up to 18 countries in Latin America and the US. Furthermore, Antena 3 TV distributes its news contents in different digital platforms that complement the terrestrial broadcasts of the Channel.

- 2nd commercial most watched channel
- Audience (16-54 year-olds): 18% (Antena 3 TV + NEOX + NOVA)
- Shareholding structure: Grupo Planeta – De Agostini (44.58%) and RTL Group (20.5%)
- Launched in 1990
- CEO: Silvio Gonzalez
- 2008 Revenues: €722 million / 2008 EBITDA: €148 million
- Website: www.grupoantena3.com



Silvio Gonzalez

The *Antena 3 family of channels* is made up of two DTT channels, *NEOX* and *NOVA*. At 2008 year end, *NEOX* was the leading DTT channel with an average audience share of 0.57%, while *NOVA* was the second most attractive DTT channel. The same year, *Antena 3 TV* completely renewed Antena 3 Noticias' portal and launched the video portal antena3videos.com.



Sogecable (Spain)

Created in 1989, Sogecable is Spain's leading Pay-TV group and pioneer in introducing digital television and Interactive services in the Spanish communications market.

Pay-TV activities

DIGITAL+ is Spain's leading Pay-TV package, reaching more than 2 million homes and a potential audience of 6.5 million viewers. Its schedules include entertainment and news across more than 150 channels and its big movie premieres and live sports events make it the leading digital TV provider nationwide.

Free-to-air activities

Cuatro is Sogecable's national Free-to-view channel, with a business model based on providing entertainment, news and quality innovation. Since going on air in 2006, it has developed a unique way of making responsible, socially committed television.

- Leading Pay-TV operator in Spain and successful Free-to-air channel
- More than 2 million DIGITAL+ subscribers
- Audience Cuatro: 8.6% (one point more than in 2007)
- Owner: Prisa
- Launched in 1989
- CEO: Pedro García Guillén
- 2008 Revenues: €1,873 million
- 1,867 full-time employees
- Website: www.sogecable.es



Pedro García Guillén

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In 2008, Sogecable signed important agreements with several telecommunications companies, which resulted in the launch of *Digital+ Móvil* for Orange users and other offers that combine television and ADSL, namely, Yacom+ -with ADSL, phone calls and TV- and Vodafone ADSL & Digital+, an ADSL and television package.
Canal+ launched *PLUSTV*, the new Canal+ Internet window, in November 2008, which provides access to all of the channel's programmes by simply visiting www.plus.es/plustv.



Telecinco (Spain)

Two new digital channels are to be added to simulcast broadcasting on the DTT multiplexes of the generalist channels: *Telecinco Dos*, dedicated to sport events, and *FDF* (Factoria de Ficción), representing a scheduling focused on internal and international fiction contents.

- Leading TV channel with 18.1% of audience share
- Majority Shareholder: Grupo Mediaset (50.5%)
- Launched in 1990
- CEO Television: Paolo Vasile
- 2008 Revenues: €981.9 million / 2008 EBIT: €394.8 million
- 1,184 employees
- Website: www.telecinco.es



Paolo Vasile



TVI (Portugal)

TVI is the leading TV channel in Portugal, with its own TV transmission network covering most of continental Portugal. TVI is number one in all-day audience share since 2005 and in TV advertising revenues, as a result of its prime time leadership position, since 2001. TVI's programming strategy focuses on key formats like news and information, domestic daytime and night time sitcoms and soaps, mini-series and other entertainment programming, complemented by foreign films and TV series, football and children's programming.

- Leading TV channel with 36% of audience share
- Owner: Media Capital (belonging to PRISA Group)
- Launched in 1993
- Managing Director: Bernardo Bairrão
- 2008 Revenues: €168.4 million / 2008 EBITDA: €44.7 million
 - Breakdown of revenues: €153.1 million Advertising, €15.3 million Other
- Website: www.tvi.iol.pt



Bernardo Bairrão

TVI had its best year ever in 2008, having registered an average share of 36% in daily consumption. In prime-time, TVI posted a new record: 41.3% share. 2008 was also the fourth consecutive year of TVI leadership in audience share.



Italy

- 24 million TV households in total
- Analogue switch-off to be completed by 2012
- Digital TV penetration 2008: 43% of TV households
- No cable operator in the country
- Average daily viewing time: 239 minutes in 2007 (15+ year-olds)
- Share of all-day viewing by channel (%)

	RAI Uno	RAI Due	RAI Tre	Canale5	Italia1	Rete4	La 7
2008	21.8	10.6	9.1	20.3	10.8	8.3	3.1

- TV advertising expenditure 2008: 53.5% of total advertising expenditure = €3,929 million

(Source: Auditel, www.key4biz.it)



Mediaset Group (Italy - Spain)

Mediaset Group developed its broadcasting activities in Italy, with three Free-to-air channels complemented by pay-per-view services, and in Spain, where *Telecinco* has grown to become the most successful commercial Free-to-air channel.
In 2008, a joint venture was established between *Medusa Film* (Italian leader in film production and distribution) and *Taodue* (Italian leader producer of high-quality TV drama), which were previously acquired by Mediaset along with Endemol (International leader in TV entertainment). This operation led to the creation of an Italian production company able to compete in the international market.

- Leading TV network in Italy with 39.3% of audience share
 - Canale 5: 20.2%
 - Italia 1: 11%
 - Retequattro: 8.1% (day-time – from 30 December 2007 to 3 January 2009)
- Free-to-air distribution and Pay-TV offer
- Majority Shareholder: Fininvest (38.62%)
- Founded in 1978 (with the name of Telemilano)
- Chairman of the Board of Directors: Fedele Confalonieri
- 2008 Revenues: €4,251.8 million / 2008 EBIT: €984.6 million
 - Breakdown of revenues: Italy: €3,271 million / Spain: €981.9 million
- 6,375 full-time employees
- Website: www.mediaset.it



Fedele Confalonieri

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Mediaset's strategy

- 1. To maintain its leadership in Free-to-air generalist TV
- 2. To develop a multichannel and multiplatform offer
- 3. To strengthen its position in the content market

In May 2008, Mediaset has acquired a 25% stake in *Nessma TV*, the Tunisian-based satellite channel launched in the spring of 2007 by the Karoui&Karoui World Group. The channel is mainly watched in North Africa: Algeria, Libya, Morocco and Tunisia, a market that is homogeneous in terms of language and culture and which is in a rapid economic and demographic expansion. *Nessma TV* will soon be available on the European side of the Mediterranean where there is a Maghreb community of more than 10 million.



SKY Italia (Italy)

SKY Italia offers the most comprehensive Pay-TV in Italy with more than 170 television, audio, interactive and pay-per-view channels. Its millions of subscribers enjoy an unprecedented choice of national and international movies, sports, news, entertainment, and music. SKY Italia's digital service provides viewers with high quality picture and sound through satellite, IPTV and mobile TV.

- First satellite platform with 4.6 million subscribers reaching more than 20% of all Italian households
- Owner: News Corporation
- Launched in 2003
- CEO: Tom Mockridge
- Website: www.sky.it



Tom Mockridge



Poland

- 14.115 million TV households in total
- Analogue switch-off to be completed by July 2013
- Digital TV penetration 2008: 40% of TV households
- DTT to be launched in September 2009
- Average daily viewing time: 254 minutes in 2007 (16+ year-olds)
- Share of all-day viewing by channel (%)

	TVP1	TVP2	TVP Info	Polsat	TV4	TVN	TVN24	Other
2008	22.6	16.8	4.1	15.4	1.8	16.7	2.7	20.2

- TV advertising: 51.6 % of total advertising expenditure = \$4,149 million

(Source: AGB, Polish Electronic Communications Office –UKE- and Informa TV International)



CANAL+ Cyfrowy (Poland)

CANAL+ Cyfrowy is the operator of the *CYFRA+ digital platform*, as well as the broadcaster of *CANAL+*, *CANAL+ Film/CANAL+ Film HD*, *CANAL+ Sport/CANAL+ Sport HD*, *CANAL+ Sport2* and TV channels *ale kino!*, *ZigZap/Hyper*, *MiniMini*, *PLANETE*, *Kuchnia.tv* and *Domo*. The company is the leader on the TV rights market and also the leading partner of Polish football. CANAL+ Cyfrowy is constantly widening its subscribers' network and is introducing services based on new technologies.

- Pay-TV operator with 1,380,000 subscribers
- Majority Shareholder: Groupe CANAL+ (75%)
- Launched in 1998
- CEO: Bertrand Le Guern
- 2008 Revenues: PLN 1.034 million / 2008 EBIT: PLN 171 million
- 290 full-time employees
- Website: www.canalpluscyfrowy.pl



Bertrand Le Guern

CYFRA+ started its operations in 1998. It is Poland's leading satellite digital platform and the only one in Europe to extend two premium offers: *CANAL+* and *HBO*. *CYFRA+* offers access to the best programmes in digital technology: currently there are almost 100 TV and radio programmes, including more than 80 in Polish language. Apart from that, the *CYFRA+ set box* makes it possible to receive several hundred other public satellite channels.

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TVN S.A Group (Poland)

TVN S.A. Group is the leading privately owned media group in Poland. TVN, the group's principal Free-to-air channel, is recognised in the Polish market as a leading TV broadcaster of high quality entertainment and of comprehensive independent news and current affairs programmes. TVN 24 is the first 24 hour news channel devoted exclusively to broadcasting national and international news and public affairs and the most widely watched thematic channel in Poland.

- Biggest commercial TV network with 22% of all-day audience share (aggregate)
 - TVN channel: 16.7% all-day audience share
- Owner: ITI Group
- Launched in 1997
- CEO TVN Group: Markus Tellenbach / CEO TVN: Piotr Walter
- 2008 revenues: €454.7 million / 2008 EBITDA: €170.5 million
 - Breakdown of revenues: 77.8% TV and online Advertising ; 6.6% Distribution license fees;15.6% other
- 2,304 full-time employees
- Website: www.tvn.pl

TVN S.A. Group owns and operates eleven television channels: TVN, TVN Siedem, TVN24, TVN Meteo, TVN Turbo, ITVN, TVN Style, Telezakupy Mango 24, NTL Radomsko, TVN CNBC Biznes and TVN Warszawa. TVN Group also owns Poland leading Internet portal, Onet.pl as well as web portals tvn24.pl, plejada.pl and tvnmed.pl. TVN Group is also a main shareholder of “n” DTH platform (51% of shares).



Markus Tellenbach



Netherlands / Belgium

Netherlands

- 7.2 million TV households in total
- First country to complete analogue terrestrial switch-off in December 2006
- Digital TV penetration end-June 2008: 48% of TV households
- High cable penetration: 95% of TV households can receive cable
- Average daily viewing time: 194 minutes in 2007 (13+ year-olds)
- Share of all-day viewing by channel (%)

	Ned1	Ned2	Ned3	RTL4	RTL5	RTL7	SBS6	Net5	Veronica	Others
Jan-Nov 2008	16.5	4.4	7.6	13.4	6	5.4	11.9	6.7	4.9	23.2

(Source: GfK Intomart and Informa TV International)

Belgium

- 4.4 million TV households in total (55% in Flanders, 33% in Wallonia, 10% in Brussels)
- Analogue switch-off completed in November 2008 in Flanders, to be completed by 2011 in Wallonia
- Average daily viewing time: in 2007 (15+ year-olds), 185 in Flanders, 228 in Wallonia
- Share of all-day viewing in Flanders by channel (%)

	EEN	Canvas / Ketnet	VTM	2BE	VT4	VijfTV	Vitaya	Others
2008	31.7	8.6	21.4	5.8	6.5	4.4	3.5	18.1

- Share of all-day viewing in Wallonia by channel (%)

	RTBF La 1	RTBF La 2	RTL-TVI	Club RTL	Plug RTL	TF1*	France2*	France3*	AB3 / AB4*	Others
2008	15	5.1	19.2	4.9	1.9	17.1	9.4	5.8	5.3	16.3

- TV advertising 2007: 36.5% of total advertising expenditure = €3,180,000 million

* Channels transmitting from France

(Source: CIM/GfK Audimetrie and Informa TV International)

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RTL Belgium (Belgium – Wallonia)

The RTL family of channels, including *RTL-TVI*, *Club RTL* and *Plug RTL*, enhanced its position as the leader in French-speaking Belgium with an average primetime audience share of 36% in the target group of shoppers aged 18 to 54. This result underlines the complementary positioning of *RTL-TVI* (general interest), *Club RTL* (sport, children's programming and alternative fiction) and *Plug TV* (young viewers aged 15 to 34), which was rebranded *Plug RTL* in September 2008.

- Leading TV network in French-speaking Belgium with 36% of aggregate audience share (primetime)
 - Audience shares (main target group, primetime): RTL-TVI: 26.3%; Club RTL: 6.5%; Plug RTL: 3.2%
- Majority Shareholder: RTL Group
- Launched in 1987
- CEO: Philippe Delusinne
- 2008 TV Revenues: €164 million / 2008 TV EBITA: €20 million
- Website: www.rtlvi.be



Philippe Delusinne



RTL Nederland (Netherlands)

With the TV channels *RTL 4*, *RTL 5*, *RTL 7* and *RTL 8*, as well as the radio station Radio 538, *RTL Nederland* is a major player on the Dutch television and radio market. RTL 24, launched in June 2008, is the first exclusive news channel for mobile phones, which offers RTL Nederland's most popular news programmes. On the Internet, the network of RTL Nederland's websites attracted in 2008 an average of 3.9 million unique visitors every month, an increase of 20.4% compared to 2007.

- Leading position on the Dutch TV market
 - Audience shares (main target group shoppers 20 – 49 year-olds, primetime): RTL 4: 14.9%; RTL 5: 7.8%; RTL 7: 4.8%; RTL 8: 3%
- Majority Shareholder: RTL Group (73.4%)
- Launched in 1996 (RTL 4 launched in 1989)
- CEO: Bert Habets
- 2008 TV Revenues: €372 million / 2008 EBITA: €59 million
- Website: www.rtl.nl



Bert Habets



VT4 and VIJFtv - SBS Belgium (Belgium - Flanders)

In Belgium, the ProSiebenSat.1 Group operates the Free-to-air TV channels *VT4* and *VIJFtv*. *VT4* is a commercial TV station in Flanders, which made its mark by being the first station to introduce popular US series. Its programming strategy combines Flemish productions with international blockbuster movies. To ensure high-quality entertainment, major content suppliers include Universal Studios, Buena Vista, Paramount Pictures, DreamWorks, Warner Bros. studios and New Regency. *VT4* also established itself as a trendsetter for Reality-TV.

VT4 aims at the Flemish-speaking population in Belgium, representing approximately 600f the total population. The channel is distributed via cable and satellite and has a 98% reach in Flanders. The core target audience of *VT4* is between 15-44 year-olds. *VIJFtv*'s programme offer, aimed at a female audience, consists of a captivating mix of local productions, US series and soaps, and popular talk shows. *VIJFtv* is distributed via cable and satellite and has a 95% reach in Flanders. The channel targets a female audience between the ages of 20-49.

- Owner: ProSiebenSat.1 Group
- Launched in 2004
- Management: Thierry Tacheny (CEO), Stefan De Keyser (COO)
- Websites: www.vt4.be and www.vt4.be



Thierry Tacheny



VMMa (Belgium – Flanders)

Vlaamse Media Maatschappij (VMMa) manages three TV channels (*vtm*, *2BE*, *JIM*) and two radio stations (*Q-music*, *JOEfm*). On top of that, VMMa has a production company (*Studio A*), a multimedia company (*Paratel*), an entertainment company (*Starway*) and a digital TV and online brand (*iWatch*). VMMa's flagship channel, *vtm*, is the leading Flemish channel in North Belgium with a generalist format. Its success is based on the mix of information and locally-made entertainment

- Leading commercial TV station with the flagship channel *vtm*
- Audience (18-54 year-olds): VTM: 23.7% / 2BE: 8.8%
- Owned by 2 Belgian media groups, Roularta Media Group (50%) and De Persgroep (50%)
- Launched in 1989
- Director General: Peter Quaghebeur
- 2008 revenues €243 million / EBITDA: €49 million
- 474 full-time employees
- Website: www.vmma.be



Peter Quaghebeur



Denmark / Norway / Sweden / Finland

Denmark

- 2 million TV households in total
- Analogue switch-off to be completed by end 2009
- 1.94 million pay-TV subscribers at end-2008, up from 1.73 million in 2007
- Digital TV penetration June 2008: 48%
- 1.65 million subscribers to IPTV at end March 2009, up from 1.52 million in 2007
- Average daily viewing time: 174 minutes in 2008
- Share of viewing by channel (%)

	TV2	DR1	TV3	Kanal4	Others
2008	31.3	24.6	4.9	1.8	37.4

- TV advertising 2008: 24.7% of total advertising expenditure = \$1,482 million

(Source: Post and Telecommunications Authority – NPT and Informa TV International)

Norway

- 2.4 million TV households in total
- Analogue switch-off to be completed by October 2009
- Very high Pay-TV penetration 2008: 91 % of households
- Average daily viewing time: 167 minutes in 2008
- Share of viewing by channel (%)

	NRK1	NRK2	TV2	TV Norge	TV3	Others
2008	32.4	3.4	25.3	8.4	6.3	24.1

(Source: National IT and Telecom Agency and Informa TV International)

Sweden

- 4.4 million TV households in total
- Analogue switch-off completed in October 2007
- DTT available since 1999
- 80% of pay-TV penetration
- Average daily viewing time: 167 minutes in 2007 (15+ year-olds)
- Share of viewing by channel (%)

	SVT1	SVT2	TV3	TV4	Kanal5	Others
Jan-Oct 2008	19	10.6	8.9	20.1	8	33.4

(Source: Mediamatningar I Scandinavien and Informa TV International)

Finland

- 2.4 million TV households in total
- World’s second country (after Andorra) to go fully digital
- Analogue switch-off completed in September 2007
- Average daily viewing time: 180 minutes in 2008
- Share of viewing by channel (%)

	YLE TV1	YLE TV2	MTV3	Nelonen	Others
Prime-time	21.7	16	26.5	11.1	24.7
All-day	24.1	16.8	22.9	10	26.2

- TV advertising: 17.9% of total advertising expenditure = €268.1 million

(Source: Finnish Communications Regulatory Authority –FICORA-, TNS Gallup Atlas 2008 and Informa TV International)



Kanal 5 (Denmark)

In Denmark, the ProSiebenSat.1 Group operates *Kanal 5*. The channel broadcasts out of the UK and is distributed via cable as well as analogue and digital satellite, resulting in a reach of more than 66% of all Danish households. Starting as a commercial TV station, formally known as TV Danmark1 in 2001, the channel was relaunched as Kanal 5 in April 2004. The programming on Kanal 5 is based on local productions, strong international and local sports content and international quality programming. Kanal 5 covers a broad range of genres and features award winning series and blockbuster movies from some of the major international content suppliers. The ProSiebenSat.1 Group also operates *Kanal4*, *6’eren* and the music channel *The Voice* in Denmark.

- Owner: ProSiebenSat.1 Group
- Launched in 2001
- Management: Henrik Ravn
- Website: www.kanal5.dk



Henrik Ravn

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Modern Times Group – MTG (Sweden – Europe)

Modern Times Group is an international entertainment broadcasting group with its core business in television. MTG is the largest Free-TV and Pay-TV operator in Scandinavia and the Baltics and has expanded its broadcasting operations in Central and Eastern Europe and to Ghana and the United States.

- Leading commercial share of viewing (2008):
 - TV3 and TV6 Sweden: 34%
 - TV3 and Viasat 4 Norway: 23.7%
 - TV3 and TV3+ Denmark: 22%
- 32 free-TV channels and 30 own branded Pay-TV channels in TV assets that include 39.4% in Russia's largest independently owned broadcaster CTC Media
- Viasat DTH satellite platforms with more than one million subscribers in the Nordic & Baltic countries
- CEO: Hans-Holger Albrecht
- Total net sales in 2008: SEK13,166 million / total operating income: SEK3,671 million
- 2,969 full-time employees (end of 2008)
- Website: www.mtg.se

The Viasat DTH satellite TV platforms offer multi-channel digital TV packages of own-produced and third party entertainment channels in the Nordic and Baltic countries and in Ukraine. MTG's TV assets, 62 TV channels, including its flagship *TV3* and *TV1000* entertainment channels, have 125 million viewers in 30 countries. MTG owns 95% of the Nova group in Bulgaria, comprising *Nova TV* and the *Diema channels* in Bulgaria and *ERA TV* in FYR Macedonia, and *Viasat3/TV6* in Hungary, 50% of *Prima* and *Cool* in the Czech Republic as well as owns *TV3* in Slovenia and *Viasat1* in Ghana.



MTV MEDIA (Finland – Sweden)

MTV MEDIA is the biggest and most diverse electronic media house in Finland, being number one in commercial TV and Pay-TV. In May 2008 efforts to promote Finnish content were acknowledged: MTV Oy was the first ever Finnish TV player to be granted the right to use the *Made in Finland* Key Flag label.

- Leading audience share for all MTV Media channels: 40.3%
 - MTV3: 27.3%
 - Sub: 11%
 - MTV3 pay-TV channels: 2%
- Owner: Bonnier AB
- Launched in 1957
- CEO: Pekka Karhuvaara
- 2008 Net sales: €257,7 million / Profit before tax and extraordinary items: €49,5 million
- 494 full-time employees
- Website: www.mtvmedia.fi



Hans-Holger Albrecht



TV4 Group (Sweden – Finland – Norway - Denmark)

The TV4 Group has delivered engaging news coverage and a broad range of high quality entertainment to Swedish viewers for almost two decades. In December 2008, the TV4 Group completed its acquisition of the leading Nordic premium Pay-TV company, *C More Entertainment*. C More's TV channels, operating under the Canal+ brand, have a very strong position in all the Nordic countries thanks to exclusive film, TV and sports rights.

- TV4 is Sweden's single largest TV channel with a total share of 19.7% (in 12-59 year-olds target audience group)
 - Total viewing of all TV4 channels: 28.2% (Canal+ excluded)
- Owner: Bonnier AB Group
- Launched in 1990
- CEO: Jan Scherman
- 2008 Revenues: SEK3,388 million / 2008 EBITDA: SEK761 million
 - Breakdown of revenues : SEK2,786 million Advertising; SEK491 million Pay-TV; SEK111 million Other
- 1,000 full-time employees
- Website: www.tv4group.se, www.tv4.se



Jan Scherman

The TV4 Group's focus on new channels continued this year and *TV4 Science Fiction* was launched in Sweden and Finland in 2008. The TV4 Group's niche channels performed strongly during the year. *TV4 Sport* saw the strongest growth thanks to the broadcast of the Ice Hockey Premier League, La Liga and the Swedish Floorball Super League. The TV4 Group's portfolio today includes 30 TV channels. As one of the leading online content providers in Sweden, *TV4 New Media* offers over 20 different web sites and mobile phone services as well as the VOD service *TV4 Play*.



Pekka Karhuvaara



Lithuania / Latvia / Estonia

Lithuania

- 1.4 million TV households in total
- Analogue switch-off to be completed by 2013
- Average daily viewing time: 212 minutes in 2007 (15+ year-olds)

Latvia

- 0.9 million TV households in total
- Analogue switch-off to be completed by 2013
- Average daily viewing time: 213 minutes in 2007 (18+ year-olds)

Estonia

- 0.65 million TV households in total
- Analogue switch-off to be completed by July 2010
- Digital TV penetration 2008: 30% of TV households
- Average daily viewing time: 243 minutes in 2007 (18+ year-olds)

(Source: Levira)



Viasat (Lithuania – Latvia – Estonia)

The MTG owned Viasat satellite platform, originally launched in Scandinavia in 1991, was introduced in the Baltic states in 2004. Viasat Broadcasting’s expansion outside Scandinavia had commenced in 1993 with the acquisition of a terrestrial TV channel in Estonia. TV3 launched in Estonia in 1996, in Lithuania in 1997 and in Latvia in 1998.

- Leading commercial share of viewing in 2008:
 - 43.5% for TV3, 3+ & TV6 in Estonia
 - 36.2% for TV3, 3+ & TV6 in Latvia
 - 40.3% for TV3 & TV6 in Lithuania
- Free-to-air distribution, DTH satellite platform and Pay-TV packages to third party operators
- Digital DTH platform and channels owned by Modern Times Group (MTG)
- Viasat Broadcasting Free-TV Baltic CEO: Kaspars Ozolins
- Viasat CEOs: Vilma Marciuleviciute (Lithuania), Valts Ermansons (Latvia) and Elena Bukhareva (Estonia)
- FTA business reported a 9% growth to SEK613 million in 2008, with an operating income of SEK151 million. The Pay-TV satellite platforms, including Ukraine from Q4 2008, increased its total number of subscribers to 218,000 at the end of 2008



Kaspars Ozolins



Czech Republic / Slovakia

Czech Republic

- 5 million TV households in total
- Analogue switch-off to be completed by November 2011
- Digital TV penetration 2008: 40% of TV households
- Pay-TV penetration 2008: 34% of TV households
- Average daily viewing time: 194 minutes in 2007 (15+ year-olds)
- Share of all-day viewing by channel (%)

	Nova	Prima	CT1	CT2	Others
Jan-Oct 2008	38.7	18.6	21.1	6.3	15.3

(Source: Cesky Telekomunikacni Urad –CTU–, ATO Mediaresearch and Informa TV International)

Slovakia

- 1.9 million TV households in total
- Analogue switch-off to be completed by December 2011
- Digital TV penetration 2008: 26% of TV households
- DTT date of launch not yet decided
- Average daily viewing time: 195 minutes in 2007 (15+ year-olds)
- Share of all-day viewing by channel (%)

	TV Markiza	STV1	TV Joj	STV2	Others
2008	35.1	16.4	16.9	5.8	25.8

- TV advertising: 77 % of total advertising expenditure = \$1,460 million

(CME and Informa TV International)

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CME (Czech Republic – Europe)

Central European Media Enterprises (CME) is the leading television broadcaster in Central and Eastern Europe. The company was founded by Ronald Lauder in 1994. Today, CME's award-winning stations reach approximately 97 million people across Eastern Europe. The company's success across these countries is attributable to its business strategy, which focuses on producing and broadcasting high quality local programming and independent news, building and operating multichannel networks and sharing knowledge and skills between its highly talented and locally managed teams.

- Leading TV channels in many European countries with high audience shares
 - 41.5% for TV Nova in Czech Republic
 - 35.1% for TV Markíza in Slovakia
 - 25.4% for POP TV in Slovenia
 - 16.5% for Pro TV in Romania
- Founded in 1994
- CEO: Adrian Sarbu
- 2008 Revenues: \$1,019.9 million / 2008 Segment EBITDA: \$345.7 million
- 4,150 employees including contractors
- Website: www.tv4group.se, www.tv4.se

CME operates *TV Nova*, *Nova Sport* and *Nova Cinema* in the Czech Republic, *PRO TV*, *PRO TV International*, *ACASA*, *PRO CINEMA*, *Sport.ro* and *MTV Romania* in Romania, *TV Markíza* and *Nova Sport* in the Slovak Republic, *POP TV* and *Kanal A* in Slovenia and *Studio 1+1*, *1+1 International* and *Kino* in Ukraine, *NOVA TV* in Croatia and *Pro.BG* and *Ring.BG* in Bulgaria.



TV Nova Group (Czech Republic)

CTV Nova is the biggest commercial TV station in the Czech Republic and is one of the most successful and profitable commercial TV stations in Europe. *TV Nova*'s flagship main television news generates, on average, 65% audience share in the 15-54 target group - this equates to 2.5 to 3 million viewers every night. *TV Nova* also operates news video server www.tn.cz and community portal www.blog.cz.

- Leading national TV network with an overall audience share of 46% (in the target group, prime-time)
- Owner: CME
- Launched in 1994
- General Director: Petr Dvořák
- 2008 Revenues: \$376.546 million / 2008 EBITDA: \$208.655 million
- Website: www.tv.nova.cz



Adrian Sarbu



Petr Dvořák



Prima TV (Czech Republic)

MTG has expanded fast in Central and Eastern Europe since *Viasat3* was launched in Hungary in 2000. With the same concept – and the same logotype – as the original TV3 it became Viasat Broadcasting's first FTA TV channel outside Scandinavia and the Baltics. The largest asset in the region is the 50% of *Prima* and *Cool* in the Czech Republic. MTG's free-TV operations in CEE comprise 22 channels in nine countries and the Pay-TV operations include the satellite TV platforms in the Baltic States and Ukraine and also the 11 Pay-TV channels distributed via third party networks in 24 CEE countries.

- 2nd commercial channel in the Czech Republic (Prima TV, 21.2% commercial share of viewing in 2008, *Cool* launched in 2009), 2nd in Slovenia (TV3, 9.7% CSOV) and 3rd in Hungary (Viasat3, 7.3%)
- Distribution through analogue and digital terrestrial networks and via cable, satellite and IPTV networks
- CEO's: Marek Singer (Czech Republic), Manja Grcic (Slovenia), Camilla Hammer (Hungary)
- MTG Free-TV Emerging Markets sales in 2008: SEK2,150 million / Operating income SEK292 million

MTG operates Free-TV channels *Prima TV* and *Cool* in the Czech Republic, *Viasat3* and *TV6* in Hungary and *TV3* in Slovenia as well as Pay-TV channels *Viasat Explorer* and *Viasat History* in the Czech Republic, Slovakia, Slovenia, Hungary and Croatia, and also *TV1000 Balkan* in Slovenia and Croatia.



TV Markíza (Slovakia)

Approximately 27% of Markíza's programming is locally-produced, including top-rated shows *Televízne noviny* (TV News), *Športové noviny* (Sports News), *Reflex* (daily magazine), *Aj múdry schybí* (To Err is Only Human), *Susedia* (domestic sitcom Neighbourhoods) and *Ordinácia v ružovej záhrade* (Rose Clinic). Among the station's highest-rated shows is its news programming, which regularly attracts a very high audience share.

- Leading national TV channel with 35.1% of audience share
- Owner: CME
- Launched in 1996
- General Director: Václav Mika
- 2008 Revenues: \$132.692 million / 2008 EBITDA: \$50.228 million
- Website: www.markiza.sk

TV Markíza launched a new programme service - *Doma* at the beginning of the 2009 autumn broadcasting season. The new channel's content is focused toward a younger female segment, aged 12-54.



Marek Singer



Václav Mika

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Slovenia / Hungary / Croatia

Slovenia

- 683,000 TV households in total
- Analogue switch-off to be completed by December 2010
- Digital TV penetration 2008: 42% of TV households
- Average daily viewing time: 188 minutes in 2007 (15+ year-olds)
- Share of all-day viewing by channel (%) –target audience: 18-49 year-olds, urban

	Pop TV	Kanal A	SLO1	SLO2	TV3	Others
2008	25.4	15	16.5	7.7	6.8	28.6

- TV advertising: 59% of total advertising expenditure = \$334 million

(Source: CME and Informa TV International)

Hungary

- 4.180 million TV households in total
- Analogue switch-off to be completed by 2011
- Digital TV penetration 2008: 29% of TV households
- Average daily viewing time: 273 minutes in 2007 (18+ year-olds)
- Share of all-day viewing by channel (%)

	M1	M2	Duna TV	RTL Klub	TV2	Viasat3	Others
1Q-3Q2008	11.7	-	-	23.9	21.1	4.8	38.5

- TV advertising: 62.1% of total advertising expenditure = \$2,251 million

(Source: AGB Nielsen and Informa TV International)

Croatia

- 1.5 million TV households in total
- Analogue switch-off to be completed by December 2010
- Digital TV penetration 2008: 35% of TV households
- Average daily viewing time: 272 minutes in 2007 (18+ year-olds)
- Share of all-day viewing by channel (%) –target audience: 18-49 year-olds

	HRT1	HRT2	RTL Televizija	Nova TV	Others
2008	24.3	15.1	26.4	22.5	11.7

(Source: AGP, Puls, CME and Informa TV International)



PRO PLUS (Slovenia)

PRO PLUS operates two successful TV channels in Slovenia, *POP TV* and *Kanal A*. *POP TV* was the first choice of the viewers in 2008 and attracted an average prime-time audience share of 31.9% in its target group 18-49 years. *Kanal A* was the first commercial television station in Slovenia when it was launched on 16 May 1991. At the time it was a novelty on the Slovenian television market and the first independent television channel in the territory of the former Yugoslavia. All domestic shows broadcast on *POP TV* and *Kanal A* are now available and proving very popular on PRO PLUS's first nonlinear television in Slovenia www.poptv.si, Slovenia's first online Catch-up television service.

- Leading national TV network
 - POP TV: leader in the market with an audience share of 25.4% in the target group
 - Kanal A: 15% of audience share in the target group
- Owner: CME
- Kanal A launched in 1991 and POP TV in 1995
- General Director: Marijan Jurenec
- 2008 Revenues: \$80.697 million / 2008 EBITDA: \$25.413 million
- Website: www.24ur.com



Marijan Jurenec



RTL Klub (Hungary)

In 2008, *RTL Klub* was the most watched channel in Hungary on 327 out of 366 evenings. The channels' audience leadership was achieved by its broad range of programmes, including established audience favourites such as the daily soap *Barátok Közt (Between Friends)*, which celebrated its tenth anniversary this year.

- Leading national TV channel with 32.6% of audience share (18-49 year-olds, prime-time)
- Principal Shareholder: RTL Group (49%)
- Launched in 1997
- CEO: Dirk Gerken
- 2008 Revenues: HUF 35,614 million/ 2008 EBIT: HUF6,524 million
- Website: www.rtlklub.hu



Dirk Gerken

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TV2 (Hungary)

TV2 established itself as one of the largest Hungarian nationwide commercial television stations. TV2 was launched in October 1997, underwent a successful re-launch in 2008, and continues to make its mark as a highly popular TV channel within the Hungarian media landscape.

- Owner: ProSiebenSat.1 Group
- Launched in 1997
- Managing Director: Zoltan Vardy
- Website: www.tv2.hu



Nova TV (Croatia)

Since its launch, Nova TV has continued to introduce new TV genres including highly rated programmes. Approximately 35% of the schedule is locally produced. With over 600,000 unique users a month and 42% reach, Nova TV also boasts Croatia's leading media Internet outlet, which includes the country's first video news portal – www.dnevnik.hr – and largest blog service – www.blog.hr.

- Leading national TV channel with an audience share of 22.5%
- Owner: CME
- Launched in 2000
- General Director: Dražen Mavrić
- 2008 Revenues: \$54.651 million / 2008 EBITDA: \$(5.415) million
- Website: www.novatv.hr



RTL Televizija (Croatia)

Launched in 2004, the TV channel already achieved the leading market position in its first full month of operations. In 2008, RTL Televizija continued to invest in its news programming by opening six regional news centres, all directly linked by satellite to the channel's headquarters in Zagreb. RTL Televizija's news bulletin *Vijesti* became the most watched news show among young viewers in the period September to December 2008, with an average audience share of 40.8%.

- Leading national TV channel with 26.4% of audience share (18-49 year-olds)
- Majority Shareholder: RTL Group (74%)
- Launched in 2004
- CEO: Johannes Züll
- 2008 Revenues: €50 million / 2008 EBITA: €2 million
- Website: www.rtl.hr



Zoltan Vardy



Johannes Züll



Romania / Bulgaria

Romania

- 6.7 million TV households in total
- Analogue switch-off to be completed by 2013
- Digital TV penetration 2008: 31% of TV households
- Average daily viewing time: 238 minutes in 2007 (18+ year-olds)
- Share of all-day viewing by channel (%)

	TVR1	TVR2	ProTV	Acasa	Antenna1	PrimaTV	Realitatea	KanalD
2008	4	1.6	16.5	8.1	9.4	5.3	3.2	4.6

(Source: CME)

Bulgaria

- 3.14 million TV households in total
- Analogue switch-off to be completed by 2012
- Digital TV penetration 2008: 19% of TV households
- DTT to be launched in December 2009
- Average daily viewing time: 225 minutes in 2007 (15+ year-olds)
- Share of all-day viewing by channel (%) –target group: 18-49 year-olds

	TV2	Ring TV	Kanal1	bTV	Nova TV	Diema	Others
2008	2	0.3	9.7	36.5	16.9	5.3	28.7

- TV advertising: 53.3% of total advertising expenditure = \$597 million

(Source: CME and Informa TV International)



Pro TV (Romania)

CME and its partners operate six television stations in Romania including Pro TV, Acasa TV, Pro Cinema, Pro TV International, *Sport.ro* and MTV. ProTV News is the highest top rated news programme on the Romanian market, with an average audience share of more than 30% in 2008. In September 2008, ProTV News' social campaign *Any idea what your kid is doing right now?* won the International Emmy Awards for "News". At the beginning of 2009, ProTV also won the NAB International Broadcasting Excellence Award for the social campaigns Pro TV News have developed in the last two years.

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- Leading national TV channel with 16.5% of audience share
- Owner: CME
- Launched in 1995
- General Director: Adrian Sarbu
- 2008 Revenues: \$274.627 million / 2008 EBITDA: \$111.783 million
- Website: www.protv.ro

www.stirileprotv.ro, *ProTV News* website, is one of the most visited news sites in Romania, offering news, exclusive videos and video-chats with key people from the social and political field, which respond to the questions of *ProTV News* viewers.



Adrian Sarbu



bTV (Bulgaria)

bTV is the first private national TV station in Bulgaria. *bTV*'s programme was broadcast for the first time on 1 June 2000, thus breaking the monopoly of the public national TV station and changing entirely the media environment in Bulgaria. For 8 years *bTV* firmly established itself as the most watched TV channel in Bulgaria with nearly 37% share of all viewers and with leading positions in the advertising market.

- Leading national TV channel with nearly 37% of audience share
- Launched in 2000
- Owned by News Corporation
- General Manager: Vicky Politova
- 2008 Revenues: \$118 million / 2008 EBITDA: \$45 million
- 386 employees
- Website: www.btv.bg



Vicky Politova

bTV has a 24-hour programming. It targets the family audience, offering a quality selection of movies, reality formats, talk shows and comedy programmes. The news and publicist programmes of *bTV* established themselves as the information leader with the highest rating of viewers' trust. *bTV* is a socially responsible media and its mission is to form positive values in the Bulgarian society. It initiates and supports many charity, social and environmental campaigns.



Nova TV (Bulgaria)

MTG owns 95% of *Nova Televizia*, which comprises the Free-TV channels *Nova TV*, *Diema*, *Diema 2*, *Diema Family* and *MM* with a combined share of viewing of 28% in 2008.

- 2nd largest commercial TV operator which audience share had increased to 32.6% in Q1 2009 and 34.7% in Q2 2009
- Diema channels acquired by MTG in 2007, Nova in 2008. Merged in 2009
- CEO: Jacob Andersson
- Pro forma net sales in 2008: €59.5 million, operating profit €13.7 million

MTG also operates the *Viasat DTH satellite TV platform* in Ukraine and well as the Pay-TV channels *Viasat Explorer* and *Viasat History* in the four countries, *TV1000 Balkan* in Romania and Bulgaria and *TV1000 East*, *TV1000 Russian Kino*, *TV1000 Action East* and *Viasat Sport East* in Russia and Ukraine. MTG owns 39.4% of CTC Media in Russia.



Jacob Andersson



Kanal D Romania (Romania)

Newcomer in the Romanian TV landscape, *Kanal D* Romania has shown the best TV launch performance in Romania in terms of audience share evolution.

- Now one of the top 5 channels in Romania with an average audience share of 5%
- Majority Shareholder: Doğan Media Group
- Launched in 2007
- CEO: Pavel Stanchev
- 2008 Revenues: YTL24 million
- 200 full-time employees
- Website: www.kanald.ro



Pavel Stanchev



PrimaTV (Romania)

Prima TV has established itself as a young TV station with a reputation for broadcasting quality programmes, covering a broad range of blockbuster movies, Reality TV, sitcoms and shows on life style trends. For international programming, *Prima TV* has contracts with leading distributors such as Paramount Pictures and Buena Vista in place. *Prima TV* is broadcast via terrestrial and satellite-to-cable distribution. The channel targets an educated, urban audience of 15-44 year-olds.

- Owner: ProSiebenSat.1 Group
- Launched in 1997
- General Manager: Mihaela Dumitru
- Website: www.primatv.ro



Mihaela Dumitru



Greece / Cyprus / Turkey

Greece

- 3.7 million TV households in total
- Analogue switch-off to be completed by 2012
- Digital TV penetration 2008: 17% of TV households
- Average daily viewing time: 259 minutes in 2007 (15+ year-olds)
- Share of all-day viewing by channel (%)

	Mega	Antenna TV	Alpha	Star	ET-1 & NET	Alter	Others
2008	18.3	15.2	13.6	10.4	13.7	11.2	17.6

- TV advertising: 32.3% of total advertising expenditure = €790 million

(Source: AGB Nielsen, Media Services and Informa TV International)

Cyprus

- 263,000 TV households in total in 2007
- Analogue switch-off to be completed by 2013
- Digital TV penetration 2008: 35% of TV households
- Average daily viewing time: 185 minutes in 2007 (18+ year-olds)
- Share of all-day viewing by channel (%)

	RIK1	RIK2	SIGMA	ANT1	MEGA	Regional
27July – 02 Aug 09	17.3	7.8	18.2	15.8	11.4	3.3

(Source: AGB Nielsen and European Audiovisual Observatory Yearbook 2008)

Turkey

- 17.5 million TV households in total
- Analogue switch-off to be completed by 2015
- Digital TV penetration 2008: 45% of TV households
- Average daily viewing time: 225 minutes in 2007 (20+ year-olds)
- Share of all-day viewing by channel (%)

	Kanal D	Show TV	ATV	Star TV	Fox	Others
Jan-Sept 2008	13.8	11.2	8.9	8.1	7.5	50.5

- TV advertising: 50.4% of total advertising expenditure = TRY1,698 million

(Source: DYH and Informa TV International)



Alpha Media (Greece)

In December 2008, RTL Group and Dimitris Contominas, owner of Alpha Media Group, closed their deal of RTL Group's acquisition of a 66.6% majority stake in Alpha Media Group, bringing the TV channels *Alpha TV* and *Kanali 9 Thessaloniki* as well as the radio stations *Alpha 98.9* and *Palmos 96.5* in RTL Group's portfolio.

Step by step, local management has started to change the programme grid of *Alpha TV*, positioning it as a general-interest channel with a focus on entertainment. With local adaptations of internationally successful formats the channel scored high ratings in its main target group of viewers aged 15 to 44, including *Come Dine With Me*, *Kitchen Nightmares*, *The Farmer Wants A Wife* and *Chart Show*. In access prime time, *Come Dine With Me* has become the most watched show in its time slot, achieving audience shares of up to 38.5%.

Other hit formats on *Alpha TV* included the morning entertainment show *Kafes me tin Eleni*, the real life entertainment programme *Pame Paketo* and the satirical comedy show *Al Tsantiri Niouz*, which remained the channel's – and the market's – most successful show with an average total audience share of 49.6% in 2009.

In a very short time frame, the new programming strategy has already proven successful as *Alpha TV*'s audience share in the commercial target group increased each month from January 2009 (12.4%) to June 2009 (15.8%), finishing the first half of the year with an average audience share of 14% (2008: 12.7%).



MEGA (Greece)

In 1989, *MEGA Channel*, also known as *MEGA*, was the first private network that was launched in Greece. During its 20 years of operation, *MEGA* has attained a high position in the public's preference while simultaneously maintaining favourable financial consistency. In 2009, *MEGA* is celebrating its 20 year anniversary in the Greek media by re-broadcasting its most successful series while other special programmes are in scheduled to commemorate this event.

- Leading national TV channel with 18.3% of audience share in 2008
- Majority shareholder: Teletypos S.A
- Launched in 1989
- Managing Director: Elias E. Tsigas
- 2008 Revenues: €168.1 million
- Website: www.megatv.com

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ANTENNA Group (Greece – Cyprus)

ANTENNA Group has been established as the world's largest Greek media group, reaching Greek-speaking audiences in all continents. *ANT1 Television* is the Group's corporate and communicative flagship. *ANT1 TV* has been holding one of the leading places on viewers' ratings scales for 20 years. ANTENNA Group's presence is also marked in Cyprus, through its collaboration with the successful stations *ANT1 TV CYPRUS* and *ANT1 FM CYPRUS* in Nicosia, founded in 1993 and 1998 respectively.

- Average audience share of 15.2% in 2008
- Launched in 1989
- Chairman of the Board: Minos X. Kyriakou / Vice-Chairman of the Board: Theodore M. Kyriakou / Group General Manager and Vice-Chairman of the Board: Spiliot J. Charamis
- Website: www.antenna.gr

ANTENNA Group's activities also extended to the digital area of unlimited possibilities. ANT1 GOLD, a digital channel, which daily broadcasts all-time favourite Greek shows and series through NOVA digital platform, has been met with great success in Greece, Cyprus and recently the US. In 2006, *ANT1 EUROPE* followed, a Pay-TV operator, which brings all *ANT1* programmes to Greek households in European countries through the popular satellite *Hotbird*. Besides series, talk shows and games, *ANT1 EUROPE* subscribers are able to watch live news. In addition, ANTENNA Group recently launched the music TV *Channel BLUE* for Greek audiences in the US.



Doğan TV Group (Turkey)

Flagship *Kanal D* strengthened its position in primetime further through successful and stable performance of Turkish dramas.

- The leading national TV network in terms of audience share:
 - Primetime: 18.23%
 - All-day: 13.99%
- Owned by Doğan Media Group
- Launched in 1993
- CEO Doğan TV Group: Mehmet Ali Yalçındağ / General Manager: İrfan Şahin
- 2008 Revenues: YTL447 million / 2008 EBITDA: YTL121 million
- 88 full-time employees
- Website: www.kanald.com.tr



Mehmet Ali Yalçındağ

Turkey's oldest private channel *Star TV* was acquired in 2007 after the Government auctioned it when its former owner ran into financial difficulties. Under Doğan administration *Star TV* started regaining its popularity.

- One of the leading national TV network in terms of audience shares:
 - Primetime: 8.01 %
 - All-day: 7.99%
- Owned by Doğan Media Group
- Launched in 1991
- CEO: Begum Doğan Faralyali
- 2008 Revenues: YTL166 million / 2008 EBITDA: YTL(44) million
- 111 full-time employees
- Website: www.kanald.com.tr

Turkey's first joint venture between a global broadcaster, Turner International, and a Turkish media group, *Doğan TV* is the leading news channel in Turkey. It employs 202 people and also serves as the newsroom for *Kanal D*. Doğan Group's *D-Smart digital platform's* number of users reached over 1,200,000 with 200,000 paying subscribers. The platform offers three Pay-TV packages including Movie, Family and Full. The HD offer was completed in 3Q2008.



Ukraine / Russia

Ukraine

- 18 million TV households in total
- Analogue switch-off to be completed by July 2015
- Digital TV penetration 2008: 7% of TV households
- DTT launched in April 2009
- Average daily viewing time: 205 minutes in 2007 (18+ year-olds)
- Share of all-day viewing by channel (%)

	Studio 1+1	Inter	ICTV	STV	Novy Kanal	UT-1 (State)	Others
2008	12	21.4	7.8	8.1	7.2	1.9	41.6

- TV advertising: 40% of total advertising expenditure = \$1,500 million

(Source: Informa TV International)

Russia

- Analogue switch-off to be completed by 2015
- National DTT rollout began in 2009
- Digital TV penetration 2008: 12% of TV households
- 600 cable operators
- Average daily viewing time: 240 minutes in 2007 (18+ year-olds)



Studio 1+1 (Ukraine)

Studio 1+1's programming includes popular US and Western European productions as well as regional productions, including popular Russian TV series and locally (Ukrainian) and home produced shows and films. *TSN* (Television News Service), a daily news programme, is an influential and powerful brand in Ukraine. It is the only news programme in the country that is socially-oriented, giving preference to everyday lives over politics. In 2009 the *TSN* Chief was awarded the *Honorary Journalist* title.

- Second most watched national TV channel with 16.3% of audience share
- Owner: CME
- Launched in 1997
- General Director: Oleksandr Tkachenko
- 2008 Revenues: \$96.738 million / 2008 EBITDA: \$(32.944) million
- Website: www.1plus1.ua



CTC Media (Russia)

CTC Media, Inc. (CTC Media) is the leading commercial television broadcaster in Russia offering entertainment programming. It operates three Free-to-air Russian television networks, *CTC*, *Domashny* and *DTV*, and *Channel 31* in Kazakhstan and TV companies in Uzbekistan and Moldova and owns two production companies. CTC Media is listed on Nasdaq under the symbol CTCM.

- Audience share of 13% (CTC – the flagship of CTC Media – is the fourth most watched broadcaster in Russia overall)
- The three networks include hundreds of affiliates throughout the country and 40 owned-and-operated television stations in Russia's largest cities
- Major shareholder: Modern Times Group (39.4%)
- CEO: Anton Kudryashov
- 2008: Net revenues \$640 million, operating income \$267 million



Ren TV (Russia)

Ren TV is one of the largest private federal channels in Russia (television network). *Ren TV* Network unites 825 independent broadcasting companies in Russia, the CIS countries and Baltic. *Ren TV* covers 788 settlements in Russia (from Kaliningrad in the West up to Yuzhno-Sakhalinsk in the East). *Ren TV* cooperates with 26 radio and 575 cable broadcasting companies in the CIS countries and Baltic and covers 326 cities. Channel audience in these countries makes more than 20 million.











- Audience share: 5.4%
- RTL Group share: 30%
- Launched in 1997
- CEO: Alexander Ordzhonikidze
- 2008 Revenues: €133 million / 2008 EBITA: €23 million
- Website: www.ren-tv.com






















Alexander Ordzhonikidze









XI ABBREVIATIONS

3D	Three Dimensions
ACT	Association of Commercial Television in Europe
ADSL	Asymmetric Digital Subscriber Line
AVMS	Audiovisual Media Services-Directive
BSkyB	British Sky Broadcasting
CEA	Consumer Electronic Association
CME	Central European Media Entreprises
CSR	Corporate Social Responsibility
DTH	Direct-To-Home Satellite
DTT	Digital Terrestrial Television
DTV	Digital Television
DVB-H	Digital Video Broadcasting – Handled
DSL TV	Digital Subscriber Line Television
EBITDA	Earnings Before Interest, Taxes, Depreciation and Amortisation
EU	European Union
FTA	Free-To-Air
GZSZ	Gute Zeiten Schlechte Zeiten
HDTV	High Definition Television
ICT	Information & Communication Technologies
IPTV	Internet Protocol Television
MTG	Modern Times Group
MTVNI	Music Television Networks International
NAB	National Association of Broadcasters
NGO	Non-Governmental-Organisation
PVR	Personal Video Recorder
TV	Television
TVWF	Television Without Frontiers-Directive
UGC	User-Generated-Content
UNFPA	United Nations Population Fund
UNICEF	United Nations Children's Fund
UTECA	Spanish Association of Commercial Broadcasters
VAT	Value Added Tax
VMa	Vlaamse Media Maatschaap
VOD	Video-On-Demand
VPRT	Verband Privater Rundfunk und Telemedien e.V., German Association of Commercial Broadcasters and Audiovisual Services
WFA	World Federation of Advertisers
WWF	World Wide Fund

	Austria
MTVNI / Sky Deutschland / ProSiebenSat.1 Group	
	Belgium
MTVNI / ProSiebenSat.1 / RTL Belgium / VMMA Group	
	Bosnia
CME / MTG / MTVNI	
	Bulgaria
bTV / CME / MTG / MTVNI / ProSiebenSat.1 Group	
	Croatia
CME / MTVNI / RTL Group	
	Cyprus
ANTENNA Group / MTVNI	
	Czech Republic
CME / MTG / MTVNI	
	Denmark
MTG / MTVNI / ProSiebenSat.1 Group / TV4 Group	
	Estonia
MTG / MTVNI	
	Finland
MTG / MTV MEDIA / MTVNI / ProSiebenSat.1 Group / TV4 Group	

	France
Canal+ Group / M6 Group / MTVNI / TF1 Group	
	FYR Macedonia
MTG / MTVNI	
	Georgia
MTG	
	Germany
MTVNI / ProSiebenSat.1 Group / RTL Group / Sky Deutschland	
	Greece
ANTENNA Group / MEGA / MTVNI / RTL Group	
	Hungary
MTG / MTVNI / ProSiebenSat.1 Group/ RTL Group	
	Ireland
BSkyB / MTVNI / TV3	
	Italy
Mediaset / MTVNI / Sky Italia	
	Latvia
MTG / MTVNI	
	Lithuania
MTG / MTVNI	

	Luxembourg
MTVNI / RTL Group	
	Moldova
MTG	
	Montenegro
MTG / MTVNI	
	Netherlands
MTVNI / ProSiebenSat.1 Group / RTL Group	
	Norway
MTG / MTVNI / ProSiebenSat.1 Group / TV4 Group	
	Poland
Canal+ Group / MTVNI / TVN	
	Portugal
MTVNI / TVI	
	Romania
CME / KanalD / ProSiebenSat.1 / MTG / MTVNI Group	
	Russia
MTG / MTVNI / RTL Group	

	Serbia
MTG / MTVNI	
	Slovakia
CME / MTG / MTVNI	
	Slovenia
CME / POP TV-KANAL A / MTG / MTVNI	
	Spain
Grupo Antena 3 / MTVNI / Sogecable / Telecinco	
	Sweden
MTG / MTVNI / ProSiebenSat.1 Group/ TV4 Group	
	Turkey
KanalD / MTVNI	
	United Kingdom
BSkyB / ITV / RTL Group / MTVNI	
	Ukraine
CME / MTG / MTVNI	

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