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Association des Télévisions Commerciales européennes
Association of Commercial Television in Europe

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by Ross Biggam, ACT Director General

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As this is the last edition of the TV Monitor of this year, we would like take a look at current and upcoming debates on media policy, both at national and EU levels. Media freedom, viewers' choice, political talk shows, copyright, internet and new opportunities are only a few of the topics we touch upon in this newsletter.

First of all, we congratulate Philippe Delusinne, CEO RTL Belgium who was unanimously re-elected as ACT President by the College of Members on 9 November 2011. His second presidency mandate will run until end of 2013 and we invited Mr. Delusinne to tell us about state of the media sector and about his vision of the ACT for the upcoming years.

"Moving images, moving Europe" was the topic of Commissioner Barnier's speech delivered at the 4th ACT Annual Conference in Brussels on 9 November. About 300 policy-makers and stakeholders came together to discuss about the commercial broadcasting sector under the theme of "Creation, Consumers and Competitiveness". Keynote speeches and discussions at the panels produced some lively discussions on our sector and future regulatory framework that you can find on page 4.

Source of information, news, trust, digital media, journalists... These are only several buzz words that reflect one of the major missions of commercial TV – informing society about important happenings across the globe. Commercial broadcasters take on this responsibility and respond to this challenge by offering viewers an astonishing number of news programmes and political talk shows. To give you an example, in the EU, Croatia and Turkey, 92 out of 157 news channels are offered by the commercial sector. Moreover, Adam Pieczyński, Head of News Department in TVN tells us about the evolution in news production in Poland and new opportunities in the age of internet and social media.

Next year, we expect multiple initiatives and legislative proposals to fill in our agenda. You can read about the ACT priorities 2012 on p. 11. We also take a look at issues at national level and we asked TVI from Portugal, to tell us about the main media policy issues in their home country. Mr. Grewenig, Managing Director of the Association of Commercial Broadcasters and Audiovisual Services (VPRT) in Germany, outlines opportunities and new challenges for commercial broadcasters at the German market.

Wishing you enjoyable reading, Ross Biggam ■



New ACT Presidency Mandate for Philippe Delusinne 2012 – 2014

Interview with Philippe Delusinne, ACT President & CEO RTL Belgium

Mr. Delusinne, you have been reelected as ACT President for another two years. What is your vision for your next ACT Presidency mandate?

More than ever, our industry is facing an increasing number of challenges. As an association representing 33 companies in 36 countries, we have to speak one voice in debates that could fundamentally bring in danger our business models. I want to give more tools and resources to our representatives in the ACT. A X-Large ACT is necessary to influence the new legislative context.



Could you tell us about the state of the broadcasting sector today?

I will answer to this question by giving you a figure: 228 minutes. This is how much the European citizens watched television per day and person on average in 2010. The business environment has seen radical changes over the past decade and we are proud that our viewers continue to trust our services. While we see the continuous demand for our content, the industry needs now to further develop its ways of monetising that demand. In 2010, television advertising in Europe rebounded strongly from the depths of recession with an increase of 7.6%. Throughout this year, the European markets are much more differentiated with double-digit growth in television advertising in Scandinavia or Estonia and an on-going decline in the Greek market. Today, European markets are uncertain. However,

“ As long as our consumers and advertisers are confident - our business will see benefits. This is why I am confident to say that the fundamentals of our business remain strong and are in good shape. ”

Mr. Delusinne, what are the main regulatory challenges the broadcasting industry faces these days?

Since digital revolution, the ways of making business in the audiovisual sector have changed radically. Let me mention a few challenges we have been facing, such as audience fragmentation, competition against unregulated players on the market, and last but not least, piracy. Policy makers need to acknowledge the fact that in the digital environment in which we are now operating, we are increasingly encountering competitors with different or non-existing regulatory regimes. At the same time, we take responsibility to ensure a high level of creation, production and distribution of professional audiovisual content in the future. But one needs to bear in mind that these require high investments. Therefore,

“ We call on European policy makers to ensure a robust copyright framework, based on the respect for exclusive rights and contractual freedom to guarantee a fair return on our investments. ”

Creation, Consumers, Competitiveness

Wrap-up 4th Annual ACT Conference, 9 November 2011, Brussels

“ The framework that we seek to create should ensure the production and continuous availability of high-quality audiovisual content at national and European level. Our goal is to create a true digital single market, which will benefit producers, viewers and TV channels alike. ”

Michel Barnier,

Commissioner for Internal Market and Service, European Commission: **“Moving images, moving Europe”**



Philippe Delusinne,
ACT President & CEO RTL
Belgium:

**“From commercial
broadcasters
to multimedia
operators”**

“The most important link between us and the EU regulators is what we put on screen. Everything we transmit costs money, and the genres which are valued by politicians such as live sport, kids, news, and original fiction are among the most expensive per hour. One international TV network spent over \$1.5 million per day covering the Japanese tsunami in March. In the larger European markets, original drama can cost up to €1 million per hour, and the right to broadcast top football can cost up to €5 million per match.

Across the ACT membership, this is a multi-annual, multi-billion euro investment in Europe’s creative, journalistic and sporting talent – a proven model of investment which should not be overlooked or discarded by those clamouring to change copyright law.

Because getting the regulatory and competition framework right, and allowing us a return on the investment we make, whether in sports rights, journalism or a programme format, is not just in the interests of the CEOs of media companies and our shareholders. It is also in Europe’s wider interests.”

David McRedmond,
CEO TV3
Ireland:

**“How commercial broadcasters
increase viewer choice”**

“If it is commercially viable, and by that I mean viewers will watch and commercial broadcasters can monetise that viewership then we will do current affairs, we will do more not less News, and we will do more niche broadcasting... occasionally! In Ireland TV3 has the top editorially-rated current affairs every night at 11 pm. We would like to do more in Prime Time, but the sponsorship restriction makes it unviable proposition. We also do live election debates; and who cannot say that in the UK the recent election was not a great case of real consumer choice when ITV and SKY competed with BBC with their own election debates.

(...) **Commercial broadcasters provide not just choice for viewers but a motivation closer to that of our viewers.** All our qualitative research conducted earlier this year identified two powerful needs of our viewers:

- the need to escape the grind of daily life;
- and the need for social inclusion.

Commercial broadcasting does this best through shows such as the X-Factor, through innovative sports coverage such as Champions League but also through News and Current Affairs if we allowed to monetise them.”



“Talking politics”

ACT Members’ news programmes and political talk shows

Freedom of expression and freedom of the media are fundamental human rights and primary condition of a democratic society. For many decades, commercial broadcasters have been taking on the challenge of enhancing democracy via informing our viewers and offering them a great choice of TV content. Commercial TV plays a vital role in informing society about important happenings on domestic and worldwide levels.

In line with political debates on media freedom, we would like to highlight how commercial broadcasters contribute to the increased viewers’ choice by giving you several examples from the many successful news programmes and political talk shows from the ACT members.

Central and Eastern Europe



TV Nova (CME): “Noviny”

nova TV Nova broadcasts around **108 hours** of news each month. The evening news is the most watched news programme in the country, drawing around **55% audience share** (15-54 target group). In 2011, TV Nova revamped the look of its news programming and added two more slots to the schedule. It also operates the online news portal tn.cz and plans to further develop opportunities for viewer interactivity in 2012.



Pro TV (CME): “Romania, I love you”



“Romania, I Love You” is a news magazine that shows the gritty reality behind public figures. Each week, ProTV’s top news correspondents also touch on emotive and inspiring social stories. Based on investigative reports, the show is a mix of research, analysis, features and interviews. It has made a positive impact on society by prompting debates that have led to changes in Romanian laws.



bTV (CME): “Election coverage 2011”



bTV was the preferred source of news amongst Bulgarian viewers during the local and presidential elections in October 2011. Ahead of the first voting round, bTV held exclusive live debates with the three presidential candidates, attracting over **1.2 million viewers** (48% audience share). During the two voting rounds, “The Election X” studio offered live coverage, discussion and opinion attracting nearly 1 million viewers each night.



Nova TV (CME): “Dnevnik Nove TV”



“Dnevnik Nove TV” is Croatia’s most watched and trusted news program. In 2010 it received the “Mika Tripalo” award for promoting democracy, human rights and media freedom. Its success is due to its objectivity, independence and innovation. It introduced the “response meter” in the 2009 elections to measure real-time viewer reaction (later used by the BBC) and created the first online interactive political chart in its “Decision of 2011” project.



Markiza (CME): Award winning journalism



In 2011, TV Markiza won the Slovak Open Society Foundation award for best analytical-investigative report for Tax Mega-fraud and How Mikulas Runs his Business and two TV news production awards for “I Can Do Everything” and “The Police of Gotham City”. The Literary Fund awarded its annual prize for journalism to Markiza’s Andrea Paulinyova for her reports “Ambulances” and “Prayer for Peace of Mind”.



POP TV (CME): Online news success



Slovenia’s top-rated TV news is enjoying equal success online. 24ur.com attracted 54% of Slovenian internet users in September 2011. “We have a highly professional team of editors who prepare quality topical content. We are adapting to new trends and technology, with a focus on smart phones and tablet computers,” said Roman Ruperts, Internet Business Unit Director.



Greece



Antenna Group: Main News



Antenna Group noted a continuous increase in viewership of its “Main News” (daily at 20:00) in 2011 (compared to 2010) each month for all main age groups. As from September 2010, ANT-1 News has refreshed its strategy. Antenna Group focuses now on real, direct news and covers issues not only from Greece but from the entire world. The news show covers all major issues giving adequate time and analysis to all issues from politics, economy to lifestyle and sports.

Ireland



TV3: Documentary “The Rise and Fall of Fianna Fáil”



“The Rise and Fall of Fianna Fáil” is a three part documentary series charting the story of what was once one of the most successful political parties in the world. The documentaries track the story of the Soldiers of Destiny from the party’s origins in the Civil War through to the dizzy heights of the Celtic Tiger era and the catastrophe of this year’s General Election. It draws on more than 50 hours of interviews with the key players, historians, academics and journalists to reveal the inside story of both the meteoric rise and dramatic fall of Fianna Fáil.

France



M6: Interactive broadcast for the presidential elections



M6 proposes news programmes of different formats. Every day, the TV news “LE1945”, supplement to the midday news programme “LE1245”, hits records of audience (up to **4.2 million viewers**). Since May 2011, the news services have been extended on the internet with “2012 & you”, which is an interactive broadcast dedicated to the presidential elections.

M6 also has its “66 Minutes” news every Sunday afternoon with a current affairs round-up: news in brief, international events, show business gossip, etc. The daily “100% Mag” programme also has a record number of loyal viewers at this crucial early evening slot.

The ongoing success of “Capital” and “Zone Interdite” is a tribute to the Group’s ability to put on challenging and high quality thematic programmes on prime time television.



TF1 Group: Multichannel source of news and information



TF1 Group is France’s leading multichannel source of news and information. News programmes on TF1 and the news channel LCI are delivered via DTT, cable and satellite and via the web on platforms such as TF1News.fr. Programmes are also accessible through smartphones and tablet apps. In 2011 TF1 News launched an iPhone app. TF1 offers web users an enhanced and nonlinear solution for prolonging the collective viewing experience in a personal way. TF1 is also involved in the press media via Metro France, a daily free sheet.

TF1’s newscasts on DTT attract the biggest audiences in Europe: a record **12.5 million** viewers tuned into “the 8 pm bulletin” on 18 September 2011. TF1News.fr had **4.0 million unique visitors** in October 2011.

TF1: a committed channel

Since December 2009, the TF1 8pm bulletin introduced an environmental indicator, the “ECO₂climat” which measures monthly CO₂ emission per person in France. This indicator aims at raising awareness of the viewers of their own CO₂ emissions in their daily life (consumption, transport...)

Finland

Finnish viewer statistics show there has been a **12% increase in TV news viewing in the past couple of years and this growth has taken place in all age groups.**



MTV3: MTV News



MTV’s first news broadcast, the “Ten O’Clock News”, was transmitted on 1 September 1981, following years of struggle to obtain the right to broadcast news. In 30 years a strong foundation has been created for MTV News, with the department having grown from producers of one news broadcast a night to a multiple-media department providing news 24/7. Today MTV3 News reaches **80% of the Finnish** population via its various media outlets, which means more than 4 million news consumers every week. On TV MTV3 is the number one news channel for under-55s in Finland.



Italy



Mediaset: Matrix



Matrix, produced by Videonews, is a news programme broadcast on Canale 5 with an average share of 14%. Alessio Vinci, former director of the CNN editorial office in Rome, presents special reports and discusses current events. The programme is broadcast twice a week. Each episode deals with an important current issue from news, politics or show business, with several guests and filmed reports. Two evenings are dedicated to news and one to "light" themes or entertainment. Matrix started in 2005 and is now in its seventh season. It follows political elections, both national and local, and hosts lively debates among industry players and politicians. You can find it on: www.matrix.mediaset.it.



Germany



ProSiebenSat.1: a new Advisory Committee

As a media company with a wide journalistic reach, ProSiebenSat.1 Group has a special responsibility to provide information and enlightenment on topics relevant to society. With its programmes ProSiebenSat.1 Group has been fulfilling this responsibility for many years. In order to expand this commitment, the Company founded an Advisory Board in July 2011. Chaired by Dr. Edmund Stoiber, it will advise the Group in important matters related to society, ethics and media policy and will provide reflexions on the media offerings of the Group. In addition, it will focus on trends which will be of decisive importance for the Company and for society in the future such as research, ecology and sustainability, young people, social issues, art, culture and sport.



The focus of the first constituent meeting of the Advisory Board taking place in November 2011 was on policy framing and media politics. The Executive Board of ProSiebenSat.1 Media AG at the suggestion of the Advisory Committee decided to start a three-year pilot project in cooperation with a large German School of Journalism and an online medium for the development of new political and economic programmes for young people. The project aims at identifying modern ways of presenting complex issues in a form of active dialogue with politicians, taking into account the tools offered by connected TV, online and mobile media. Initially, the project will be financed with EUR 500,000.



RTL Group: Keeping people informed

Delivering news for the people has been one of RTL Group's core competencies for decades. Here you have five reasons why RTL news is so popular across so many countries:



1. Commitment to News

RTL Group TV channels deliver the most up-to-date and authentic information to the people. They invest in the necessary financial and human resources. For example, every two years, the RTL Journalistenschule in Germany (RTL School of Journalism for TV and Multimedia) trains a class of 30 aspiring journalists. Since January 2001, a total of 145 students have successfully completed their training as TV editors. All graduates found jobs following their graduation and today work primarily on editorial teams at Mediengruppe RTL or at public-service and commercial broadcasters, TV production firms and other media companies.

2. Talking the viewers' language

There are many ways to tell a story, but few ways to tell it well. RTL Group's broadcasters find the right 'translation' of social and political issues which, combined with skillful use of today's technology, keeps audiences engaged and informed.



3. Trusting the anchor

Popular personalities as anchors help to establish and maintain enduring, trusting relationships with viewers. Success also comes through having a strong local presence, with operations run by local managers and editors.

According to a recent TNS Emnid survey, RTL Television's Editor-in-chief Peter Kloeppel is the best-known and most competent news anchor on German television.



4. Going Big for Big News

RTL Group provides more wide-ranging and deeper insights into the big events and breaking stories, with correspondents on the spot as key world events unfold.



5. Being independent

At RTL Group's TV channels, the audience is king – this also means withstanding political pressure groups, promoting media pluralism, and maintaining diversity and credibility. The company's local journalists decide what's relevant for the viewers, and no one else.

Facts & Figures

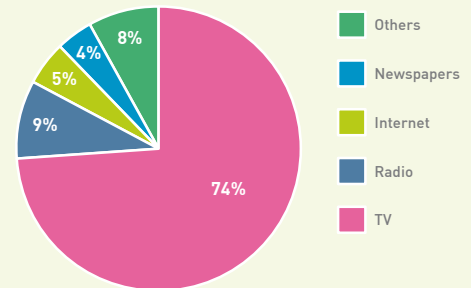
- Throughout the 2010/11 season, RTL-TV's 13:00 news bulletin (Le 13 heures) beat its competitors every single day, scoring an average audience share of 45% in French-speaking Belgium. The results achieved by the 19:00 news (Le 19 heures), scoring an average audience share of 46.5%, are even more remarkable.
- In Germany, 120,333 hours of live news have been broadcast by N-TV, the first German news channel, in the 19 years since its founding. Each day, as many as 400 video clips are produced by the channel.
- In the EU, Croatia and Turkey, 92 out of 157 news channels are commercial broadcasters.
- In Greece, Alpha News saw an increase of 51% in audience share from 2008 to 2010.
- In France, M6 has 100 journalists covering daily news, and another 200 working on its popular magazine formats such as Capital and Zone Interdite.

Source: "News for the people", RTL Group, April 2011

Did you know that..?



- **ITV plc** currently provides regional news programmes in England, the Borders and Wales, as well as national and international news through its contact with ITN.
- **ITV plc** employs some 470 news journalists.
- **ITV News** accounts for 20% of all viewing to national and international news in the UK.
- **Investment in news:** ITV supports around 1,500 hours of UK/national news a year (27% of the UK total, excluding 24 hour channels), and 2,909 hours of regional news a year.
(Source: "Public service broadcasting Annual Report 2011", Ofcom, 2011)
- **Source of information..** TV news is viewed weekly by majority of adults: 79% of adults regularly use TV as a source of news and 44% of adults whose only source of news is TV on a weekly basis.
- **Trust..** TV is most trusted to represent fair and unbiased coverage of UK news (source: Ofcom Media Tracker).
- **Digital media..** Consumers are increasingly multi-sourcing their news from a range of different providers across different platforms. Digital media are complementary to traditional news media, and TV remains an important part of the news mix.



Sources most trusted to present fair and unbiased news coverage in the UK

Source: "Informing the UK, The role of TV news in the digital world", Communications Chambers (A report commissioned by ITV), 2011

Interview with Adam Pieczyński,

Head of News Department TVN



Mr. Pieczyński, you have been working for TVN since several years – did you see any changes in news production in Poland? How did the media environment evolve with the introduction of commercial broadcasters?

The change in the news production has been dramatic since TVN24, the first news channel in Poland, was launched. The live coverage of the national and international events has become something natural and expected by viewers. The public receive the full picture of what is going on, I could even say that a category of "news-maniacs" has appeared in Poland. TVN24 boasts an amazing audience of 3.2% (with 60% of technical coverage).

The presence of commercial broadcasters, including TVN Group, has had an immediate effect on the quality of information by introducing competition between different media. But perhaps the most important fact is the pluralism which is the best, if not the only, guarantee of the integrity of information and the main weapon to fight against political censorship.

According to statistics, TVN with 83% is today "the most trusted public institution in Poland". What made TVN station so successful and trusted among Polish citizens?

The popularity does not come easily; it requires time, people's effort and a huge technological investment. We did it all. We have the most trusted journalists (anchors, reporters), huge news gathering network with nine local and four international offices, and above all, the spirit of leadership. But I'd like to stress once again - time is the key. It took fifteen years to gain this position on the market and quality leader.

On 9 October we saw parliamentary elections in Poland. Did TVN take part in debates on politics in the Polish society?

After the elections we carried out a poll to know how people appraise the media coverage of the campaign. The result was really good for us. Almost 80% of the population said that their source of information was TV. Our channel got the best rating - 62% considered our coverage as "good or very good".

In the age of internet and social media, do you see a shift of what journalism is nowadays, e.g. does so-called citizens' journalism exist in Polish media? Does TVN engage its viewers in its news production?

Internet is like the nuclear energy. It is so powerful... It can be used both in a positive and in a very negative way. It can enrich the flux of information and it can be easily used as a dangerous weapon in hands of politicians, marketers, criminals or simply naive people who cannot distinguish between news and gossip or analysis and conspiracy theories.

Having said this I want to stress that in our case, certainly, internet plays a positive role as an additional source of information. We have a great experience with our internet site – "Kontakt 24" in which we offer to our social collaborators possibilities to publish their news. More than 15,000 people at least once published their information on this website. On the daily basis, we receive several hundreds of pieces of information and we use in our services up to ten topics that were suggested by our viewers.

National media policy debates

Portugal



TVI

Portuguese broadcasters are facing a challenging time, both technologically and financially. There are several topics of interest in evidence at the moment, the most pressing of which being the privatisation of the public broadcaster. Other current issues are the discussion around what constitutes public service, which is linked to the decision above, the switch off to Terrestrial Digital Television (TDT) (scheduled for April 2012) and new technology and over the top TV.

Due to the economic situation that the country is facing, the Portuguese Government has confirmed that the public broadcaster, or one of its channels, will be privatised in 2012. One of the implications of this move is the immediate increase of advertising space available to advertisers by 40%. Given the size and the financial reality of the Portuguese market, where advertising spend has been steadily eroding for several years, this increase is seen with much concern by the existing private broadcasters. Linked to this is the issue of public service and to which extent there is, in fact, a need for a public broadcaster.

“ As far as TDT is concerned, Portugal will complete its switch over in April 2012. ”

There have been many doubts in the market as to how TDT will function but these have slowly been dissipated and the switch over to TDT, in pilot areas, has been progressing without incident, even if there are some doubts as to the coverage of some geographic regions. This move is estimated to impact more than one million homes.

The future of television consumption is, of course, also very much a topic *du jour*. New technology, multi-platform content, different viewing habits of the younger generations and over the top/connected television are at the forefront of stakeholders' minds.

Germany



Claus Grewenig, Managing Director VPRT (Association of Commercial Broadcasters and Audiovisual Services in Germany)

Commercial broadcasting in Germany is a success story, both creatively and economically. With innovative power, the willingness to take risks and significant investments in high-quality content, German commercial broadcasters have successfully adapted their business to the digital age and contribute to the most diverse media landscapes in Europe.

It is clear that the television and radio environment has changed significantly in the last few years through new players in the market and new technologies developed. With new opportunities and new challenges, our members need a regulatory framework adapted to the new surroundings whilst creating a level playing field. This needs to respect the value of content and to ensure that consumers can easily find and access our content across multiple platforms. The legal environment must respect business models that are based on contractual freedom and territorial licensing of audiovisual works. In Germany VPRT has initiated a German Content Alliance bundling important players of the creative and culture industries (broadcasters, film, music, books, and collecting societies) in order to coordinate our work for fair competition and a future proof regulatory framework.



“ Creative industries are the core of an innovative and pluralistic society and a main driver for technological developments. Intellectual property is one of the few remaining key resources in Germany and the EU that needs to be preserved. ”

ACT Media Policy Priorities for 2012



The European television business has never been healthier. European consumers, despite the array of competing demands for their leisure time, are watching more television than ever before - on average, 228 minutes per day in 2010, the tenth successive year in which that key indicator had increased.

Paradoxically, at a time of such growth and success in our sector, the challenges facing the television business are also more significant than ever before.

The very success of the model of distributing video content to consumers has attracted new entrants, many of them already dominant in neighbouring markets such as telecommunications, CE hardware manufacture or IT, who wish also to compete for the precious resource of European consumers' attention. The arrival on the market of such well-resourced players may be expected to accelerate yet further the pace of development of new technologies of redistributing content to viewers, such as connected TV or "over the top" distribution. In itself, these changes are no cause for concern for the broadcasting sector. But these latest changes – and connected TV, combining broadcast television with broadband internet on the main screen in the living room, is a good example – do much more than simply bring new players to the market. Such developments pose uniquely systemic challenges for European regulators, notably how to

ensure respect for copyright in a rapidly converging system where players from the hyper-regulated world of European television come together with those from the unregulated "free" culture of Silicon Valley.

European broadcasting is today an €84billion sector. But, more importantly than the overall size of the sector, commercial broadcasters reinvest up to 44% of our revenues from advertising and subscription back into content – whether this is sport, news, entertainment programmes, movie rights or documentaries.

This is relevant to the European policy agenda for two reasons. **First, it is the production of original programme content which will help create the economic growth and in particular the flexible but highly-skilled jobs which Europe needs. And secondly because it is clear that copyright reform will be the key theme for EU media policy discussions for the remainder of the Barroso II Commission.** Commissioners Barnier, Kroes and Vassiliou are all active on various dossiers – the Audiovisual Green Paper, the Digital Agenda or the Creative Europe programme. And we expect early in 2012 proposals on collective rights management, and on enforcement of intellectual property. Clearly, copyright law should not be immune to the radical and objective review of all media legislation which will be needed to make the regulation of "television" fit for the digital economy. But we need to establish some common ground between the European institutions, commercial broadcasters, and new entrants. Our starting points are

- (i) that rightsholders and creators have a right to control, and to be paid for the distribution of their work
- (ii) that improved anti-piracy protection is essential to safeguard the interests of rightsholders and creators and
- (iii) that Europe should encourage the levels of reinvestment in new content undertaken by broadcasters and other content industries.

The alternative – a sector in which there is no meaningful investment in journalism, in new TV programmes, in movies or in European sport – is not in the interests of anyone in Europe.



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