European Broadcasters

Craoltóirí Eorpacha

Commissioning Editors - Drama

Eagarthóirí Coimisiúnaithe - Cláracha Drámaíochta

Acquisitions - Drama

Ceannaitheoirí Clár - Cláracha Drámaíochta

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Introduction

Producers often contact us prior to the deadlines for the MEDIA support scheme for TV Broadcasting looking for contact details for European Commissioning Editors. It is easy to direct Documentary producers to the excellent EDN Guide. (www.edn.dk). The Animation sector has access to tailored market events and the CARTOON network is a great resource. (www.cartoon-media.be).

However, this is not the case for TV Drama. On the occasion of the Celtic Media Festival this Guide is a first attempt to provide this information with regard to Broadcasters in the Celtic countries. It is a work in progress and we intend to expand the guide to include other European countries in the future in co-operation with the European network of MEDIA Desks and Antennae.

Réamhrá

Is minic a bhíonn léiritheoirí i dteangbháil linn roimh na spriocdhátaí don scéim tacaíochta MEDIA do Chraoladh Teilifíse ag lorg sonraí teagmhála d'Eagarthóirí Coimisiúnaithe Eorpacha. Tá sé éasca treoir a thabhairt do léiritheoirí chláracha fáisnéise toisc go bhfoilsíonn EDN eolaire íontach leis na sonraithe seo. (www.edn.dk). Tá margaí faoi leith ag an dtionscal beochana agus is áis íontach í an eagraíocht CARTOON. (www.cartoon-media.be).

Níl an rud céanna fíor maidir le cláracha drámaíochta áfach. Ar ócáid Féile na Meán Ceilteach is céadiarracht é an t-eolaire seo na sonraí seo a chur ar fail maidir le Craoltóirí sna tíortha Ceilteacha. Tá sé i gceist againn tíortha eile a chur leis an Eolaire amach anseo i gcomhar leis na Deascanna agus Antenna MEDIA san Eoraip.

Siobhan O'Donoghue
MEDIA Desk Ireland

Eibhlín Ní Mhunghaile
MEDIA Antenna na Gaillimhe

FRANCE (An Fhrainc)

TF1 continues to lead the audience ratings in France, although its market share dropped significantly again in 2008. The private channel, controlled by the Bouygues group, achieved less than 30% of daily as well as prime time audience figures (27.2% and 29.7% respectively) for the first time. The two leading public service channels, France 2 and France 3, suffered less substantial falls in viewing figures although, like those of TF1, they have been falling steadily since 2005. France 2 nevertheless remains second in the market with 17.2% of daily audiences and France 3 is still third with 13.3%. M6, in fourth position, was down 0.5% to an 11% market share. In total, the seven analogue terrestrial channels only represented 76.4% of daily audiences in 2008, compared to 86.1% in 2006. This is the result of the success enjoyed by new free digital terrestrial television (DTT) channels, which attracted 11.1% of daily audiences in 2008. The most popular of these were TMC (2.1%), W9 (1.8%) and Gulli (1.5%).

(Audience data source: Eurodata TV Worldwide / Médiamétrie / Médiamat).

The rising popularity of DTT channels, combined with the drop in advertising income linked to the economic climate, has disrupted the traditional broadcasters. For example, TF1, aware of its low level of diversification, wanted to buy TMC and NT1, two DTT channels controlled by the AB group. The competition authorities announced in September 2009 that they had opened a detailed investigation of this acquisition.

A few months earlier, in October 2008, TF1 had sold its stake in the French international news channel, France 24. Owned in equal shares by TF1 and France Télévisions when it was launched in 2006, the channel is now completely controlled by the company Audiovisuel Extérieur de la France.

Audiovisual equipment in French households continues to evolve. At the end of 2008, according to the Observatoire de l'équipement des foyers pour la réception de la TV numérique (CSA), less than a quarter of households could only receive analogue terrestrial channels (compared to more than a third at the end of 2007).

The cable television market is particularly concentrated, since the company Numéricâble (Civen and Altice) has 3.5 million subscribers, which represents virtually all cable households in France.

The satellite TV sector is still dominated by CanalSat (Canal+ group), with 5.3 million subscribers at the end of 2008. Nevertheless, the company no longer holds a monopoly and faces competition from the Bis package (AB group) launched in December 2007 and, to a lesser extent, from France Télécom's Orange service (reserved for subscribers whose lines are unable to receive television via ADSL). Finally, TNT Sat (Canal+) and FRANSAT (Eutelsat) were launched in 2007 and 2009 respectively. They offer free access via satellite to the DTT channels for households not covered by the terrestrial network.

The success of IPTV is a distinctive feature of the French market. According to the ARCEP, at the end of 2008, 6.2 million households had access to one of the six services available in France: AliceBox (Telecom Italia), Bbox (Bouygues), DartyBox (Darty), Freebox (Free), Livebox (Orange) and NeufBox (SFR). The number of IPTV subscribers rose by more than 1 million in 2008, and more than one in five French households can now receive television via ADSL. Free remains the market leader with 3.3 million subscribers and its parent company, Iliad, initiated an external growth policy by purchasing AliceBox in August 2008.

Competition between distributors came to a head with a dispute over the future of Orange's exclusive channels (sport and cinema), which Free and SFR accused Orange of offering to its own subscribers only. The Paris commercial court ordered that this exclusivity should end in March 2009, a decision that was overturned on appeal in June. The competition authority finally published an advisory opinion in July 2009, stating that this exclusivity was questionable and proposing that it be limited to a certain period of time.

According to the CSA, more than 65% of French households received digital television at the end of 2008. This 17.9% increase is closely linked to the success of DTT, which more than 9 million households (35.8%) were equipped to receive at the end of 2008. The success of free DTT contrasts with the situation of the subscription-based DTT service, from which two channels withdrew because of a perceived lack of profitability: AB1 at the end of 2008 and the children's channel Canal J in April 2009.

Around 30 local channels are also broadcast on the digital terrestrial network and calls for tender continue to be launched. However, the market for local channels has never been especially dynamic in France and several of these channels, including Nantes 7, TLT (Toulouse) and LCM (Marseille), are facing enormous financial problems.

DTT's coverage rate reached 88% of the population in July 2009. For the first time, analogue terrestrial signals were switched off in some locations in 2009, such as in Coulommiers (Paris region) and Kaysersberg (Alsace). The full switchover to digital terrestrial TV will take place in 2011.

The development of personal mobile TV has slowed down to the extent that the very principle of the launch appears at times to be compromised. The mediator appointed by the Prime Minister, Cyril Viguier, published his report in July 2009, proposing ways of resolving the issue of the financing of the broadcasting network. Neither the channel providers nor the telecommunications operators (which are already marketing television services on mobile phones via their 3G networks) are willing to take the risk. One possible solution is to create an ad hoc company involving the operator TDF and the channel providers.

In terms of legal developments, 2009 was marked by public broadcasting reforms. Announced and debated in 2008, the relevant texts were promulgated in March 2009. The public broadcasters were grouped together in a single company (France Télévisions), the governance of which was amended. Their channels no longer broadcast advertising between 8 pm and 6 am. The resulting loss of advertising income has proved to be lower than expected for France Télévisions, generating controversy over the payment of EUR 70 million in compensation in summer 2009. France Télévisions wishes to use this sum to reduce its deficit, while the Ministry of the Economy wants to reduce its payment to the public company. Nevertheless, in September 2009 the European Commission authorised the payment of EUR 450 million in aid to France Télévisions in 2009 and, at the same time, opened an investigation into its financing mechanisms beyond 2010.

Source: European Audiovisual Observatory Mavise Database (http://mavise.obs.coe.int/)

ARTÉ FRANCE

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670880 Starsbourg cedex
FRANCE

The French unit of ARTE, ARTE France, is a broadcaster producing for ARTE only. It delivers approx. 900 hours of programming a year.

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Arte France	Ms Virginie PADILLA	Assistante Achat Fiction	v-padilla@artefrance.fr	33 1.55.00.77.77.
	Ms Marie-Catherine MARCHETTI	Responsible of Acquisition - Fiction	m-marchetti@artefrance.fr	
	Mrs Sylvie SMETS	In Charge of administation Service buyers	s-smets@artefrance.fr	
	Mr Nicolas DESCHAMPS	Responsible of Acquisition	n-deschamps@artefrance.fr	
arte g.I.e.e. THEMA	Mrs Susanne BIERMANNE	Responsible of Acquisition	susanne.biermanne@arte.tv	33 1.45.25.25.66.
Arte GEIE	Mrs Silvie CORSO	Responsible of Acquisition	s-corso@arte-tv.com	

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Arte France	Mlle Isabelle HUIGE	In charge of fiction programme	i-huige@artefrance.fr	
Arte France	Mrs Marie Catherine MARCHETTI	In charge of fiction programme	mc-marchetti@artefrance.fr	
Arte GEIE	Mrs Lisa MÜLLER	In charge of fiction programme	l-mueller@arte-tv.com	

CANAL+

Espace Lumiere,
5/13 Boulevard de la Republique
92100 Boulogne
FRANCE

Canal+ is a national pay TV channel totally financed by subscription. It transmits by terrestrial network and satellite. Total annual hours of transmission: approx 8000. Canal+ le Bouquet (Canal Plus, Canal Plus Cinéma, Canal Plus Sport, Canal Plus Décalé, Canal Plus Hi-Tech, Canal Plus Family) (France)

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Canal + Active	Mr Louphet EIMER	In Charge of Acquisition Canal+ Active	louphet.eimer@canal-plus.com	
Canal France International - CFI	Mme Margaret GOUBIN	Responsible of Acqusition, Documentary and Fiction	tv mgn@cfi.fr	

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Canal J	Mr Christhophe DE MELO	Acquisition	christophe.demelo@lagarder-active.com	33 1.56.36.54.63. dr
Canal J	Mme Giulia TENRE	In Charge of Acquisition	giulia.tenret@lagarder-active.com	33 1.56.36.55.52. dr
Canal Plus	Mrs Lauries DUMAS	In Charge of acquisition - Young Unite	lauries.dumas@canal-plus.com	33 1.71.35.35.35.
Canal Plus	Mrs Myriam ESNOUF	In Charge of acquisition PPV-VOD	myriam.esnouf@canal-plus.com	
Canal Plus	Mr Corentin GLUTRON	In Charge of Discovery Acquisition	corentin.glutron@canal-plus.com	
Canal Plus	Mrs Sandra OUAISS	In Charge of Forein Acquisition	sandra.ouaiss@canal-plus.com	
Canal Plus	Mrs Aline MARRACHE-TESSERAUD	Director's Assistant of Acquisition - Forein Fiction	aline.marrachetesseraud@canal-plus.com	
Canal Plus	Mrs Claire PETIT	In Charge of Acquisition - Cinema	claire.petit@canal-plus.com	
Canal Plus	Mrs florence SARFATI	In Charge of acquisition/Production New Contents	florence.sarfati@canal-plus.com	
Canal Plus Cinéma (Pôle Cinéma du groupe)	Mme Françoise PERRIN	Foreign Fiction Acquisitions - Cinema Unite	francoise.perrin@canal-plus.com	
Cinecourts-Cinecinema	Mr Patrice PATRICE	Director of Short Film Acquisition	patcarre@club-internet.fr	33 1.71.35.35.35.
Comédie !	Mr Franck LEGRAND	Acquisition	franck.legrand@canal-plus.com	

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Canal+ le Bouquet	Mrs Vera PELTEKIAN	In charge of project	vera.peltekian@canal-plus.com	
Canal+ le Bouquet	Mr Pierre SAINT-ANDRE	In charge of project	pierre.saintandre@canal-plus.com	
Canal+ le Bouquet	Mme Arielle SARACCO	Director of Programme, Fiction, Documentary and short film Unite	arielle.saracco@canal-plus.com	
Ciné Polar	Mr Eric KOLLEK	Held of programme coordination	achats-sat@groupe-ab.fr	
Ciné Polar	Mr Patrick SARREA	Held of programme coordination	achats-sat@groupe-ab.fr	
Cinécinéma Culte (ex-TPS Cinéma)	Ms Laure LLOSE	In charge of selection of programme, TPS Cinema	laure.llose@corp.tps.fr	

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Comédie !	Mr Jean Christophe ANDRE	Director of programming	jeanchristophe.andre@canal-plus.com	

DIRECT 8

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Ms Johane BOUTET	In Charge of Acquisition	j.boutet@direct8.net	33 1.71.35.35.35.	
Mr Yann LE PRADO	Director of Acquisition	y.leprado@direct8.net		

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Direct 8	Mr François BARRE	Director of programming	f.barre@direct8.net	33 1.46.96.48.88.
Direct 8	Mr David GAUTHIER	Directeur of the emission and programming	d.gauthier@direct8.net	

FRANCE 2

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France
Tel: +33 1 5622 4242
Website: www.france2.fr

France 2 is now part of FRANCE TELEVISIONS group, with one head of documentaries for all the channels. It is a national public service broadcaster and is financed by license fees and advertising. France 2 transmits by terrestrial network.

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL
France 2	Mme Sabine CARION	Adviser of Programming for Series, Fiction and Soap	s.carion@france2.fr
France 2	Mme Jocelyne CHAUVIN	Director's Assistant in Charge of Acquisition	j.chauvin@france2.fr

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
France 2	Mme Sabine CARION	Adviser of Programme for series, fictions and telefilm	s.carion@france2.fr	
France 2	Ms Sophie TRAN	Programme's Adviser - Fiction Unite	s.tran@france2.fr	

FRANCE 3

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75907 Paris cedex 15
France
Tel: +33 1 5622 3030
Website: www.france3.fr

France 3 is now part of FRANCE TELEVISIONS group, with one head of documentaries for all the channels. It is a national public service broadcaster with 13 regional units. The channel transmits both national and regional programmes by terrestrial network and by satellite in collaboration with TV5. Total annual hours of transmission: 5935

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
France 3	Mlle Francesca DANDOLO	Programming's Adviser at the Cinema and forein fiction Unite	dandolo@exchange.france3.fr	
France 3	Mme Sylvie LENGLET	Administrator of acquisition for cinema and fiction	lenglet@exchange.france3.fr	
France 3	Mrs Eve BARON	Co-production, acquisition	eve.baron@francetv.fr	33 1.56.22.30.30

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
France 3	Mrs Johanne RIGOULOT	Programme's Adviser - Fiction Unite	rigoulot@exchange.france3.fr	
France 3	Mrs Catherine RUAULT-CASTERA	Programme's Adviser - Fiction Unite	ruaultcastera@exchange.france3.fr	

FRANCE 4

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ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
France 4	Mrs Sophie TRAN	In charge of acquisition and future film	sophie.tran@francetv.fr	33 1.56.22.68.68.
France 4	Mr Frédéric PRALLET-DUJOLS	Director of acquisition, in charge of fiction, cinema and theatre pre-acquisition	frederic.prallet.dujols@france4.fr	
France 4	Mlle Catherine GAUCHER	Director's Assistant of acquisition	catherine.gaucher@france4.fr	

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
France 4	Mme Hellen GOUGET	In charge of series tv acquisition	hellen.gouget@francetv.fr	

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
France 4	Mr Cyril GIRAUDBIT	Held of programming	cyril.giraudbit@france4.fr	

FRANCE 5

10-16, rue Horace Vernet
92785 Issy-les-Moulineaux cedex 9
France
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France 5 is now part of FRANCE TELEVISIONS group. It is a knowledge channel. France 5 transmits by free analogue terrestrial network, free digital terrestrial, cable and satellite. Total annual hours of transmission: 4100.

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL
France 5	Ms Caroline BEHAR	Acquisitions et int'l coproductions	caroline.behar@francetv.fr

JUNE (Ex-Filles TV)

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ACQUISITIONS

NAME	POSITION	EMAIL
Mme Emmanuelle BARIL	Director of acquisition	emmanuelle.baril@canalj.fr
Mlle Julia TENRET	Director of acquisition	julia.tenret@canalj.fr

COMMISSIONING EDITORS

NAME	POSITION	EMAIL
Mr Pierre BELAISCH	General Director of programming and emission - Television Unite Lagardère Active	pierre.belaisch@lagardere-active.com
Ms Caroline MESTIK	Director of programming	caroline.mestik@canalj.fr

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ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
M6	Mr Bertrand MAJANI	Director of acquisition	bmajani@m6.fr	33 1.41.92.66.66.
M6 - Metropole Television	Ms Morgann FAVENNEC	In charge of acquisition and artistique development - young departement	mfavennec@m6.fr	
M6 - Metropole Television	Ms Abigal JOLIOT	Acquisition - cinema	ajoliot@m6.fr	
W9	Mme Laure DEVOISSARD	In charge of acquisition - series and film	lldevoissard@m6.fr	33 1.41.92.27.21.

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL
M6 - Metropole	Ms Alexandra NORTH	Fcition Programming's Adviser	anorth@m6.fr
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M6 - Metropole Television	Mrs Aude THEVENIN	Fiction Programming's Adviser	athevenin@m6.fr
M6 - Metropole Television	Mlle Rhida BARKAOUI	In charge of selection of fiction	rbarkaoui@m6.fr

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NT1

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
NT1	Mlle Florence DELPOUSSE	Director of programming	florence.delpousse@groupe-ab.fr	

13EME RUE / SYFY

ACQUISITIONS

NAME	POSITION	EMAIL	TELEPHONE
Mr Philippe DANON	Series & Documentaries Programming Manager, acquisition courts-métrages	philippe.danon@nbcuni.com	33 1.55.57.35.24.
Mr Kevin DEYSSON	Production & Acquisitions Executive	kevin.deysson@nbcuni.com	33 1.55.57.35.00.

PARIS PREMIERE

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ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Paris Première	Mr Francois TROCHET	In charge of acquisition - events	francois.trochet@paris-premiere.fr	33 1.41.92.57.11.

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Paris Première	Ms Eugenie DE BONNAFOS	Held of programming	eugenie.debonnafos@paris-premiere.fr	

RTL 9 (FRANCE)

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL
RTL 9 (France)	Ms Maud BONASSI	Director's Assistant of Acquisition - fiction	maud.bonassi@groupe-ab.fr
RTL 9 (France) NT1 (France)	Ms Nathalie BIANCOLLI	Director's Assistant of Acquisition - fiction	nathalie.biancolli@groupe-ab.fr

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TF1

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ACQUISITIONS

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TF1	Mrs Sophie LEVEAUX	Arstistique Director of acqusition	sleveaux@tf1.fr	
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TF1	Mrs Marie-Aurelie BONNET	Artistique Adviser of programming	mbonnet@tf1.fr	
TF1	Mr Remi HAMPARTZOUMIAN	Right's negotiation - acquisition	rhampartzoumian@tf1.fr	

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
TF1	Mrs Marie-Claire SARRY	Right's negotiation - acquisition	msarry@tf1.fr	
TF1	Mr Rémi JACQUELIN	Director's Assistant of acquisition - cinema, series and soap	rjacquelin@tf1.fr	33 1.41.41.12.34.
TF1 International	Mrs Annabel BIGHETTI	Senior executive tv sales e acquisitions	abighetti@tf1.fr	33 1.41.41.21.68.
TF1 Video	Ms Rachel SIEGENTHALER	In charge of acquisition	rsiegenthaler@tf1.fr	33 1.41.41.12.34.
TF1 Video	Mr Jim SARFATI	Film Acquisition	jsarfati@tf1.fr	33 1.41.41.12.34
Série Club	Mr Vincent BROUSSARD	General Delegate's Director of acquisition for TF6 and Série Club	vbroussard@tf6.fr	
TF6	Mr Vincent BROUSSARD	General Delegate's Director of acquisition for TF6 and Série Club	vbroussard@tf6.fr	

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE	
TF1	Mme Dominique POUSSIER-ROSTAIN	Director of Young Unite Programme	dpu@tf1.fr		
TF1 International	Mr Laurent STORCH	Director of programming	lstorch@tf1.fr	33 1.41.41.21.68.	

TPS Star/Cinecinema Star/ Cinecinema Culte

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Issy les Moulineaux,
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France

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
TPS Star	Mme Aline DUMON	Short Film Acquisitions	aline.dumon@canal-plus.com	33 1.71.35.32.64.
TPS Star / Cinécinéma Star / Cinécinéma Culte (ex- TPS Cinéma)	Mrs Lorraine HOUSSIN-SULLIVAN	In charge of short film acquisition	lorraine.houssinsullivan@corp.tps.fr	

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
TPS Star / Cinécinéma Star / Cinécinéma Culte (ex- TPS Cinéma)	Mlle Aline MARACHE-TESSERAUD	In charge of forein fiction acquisition	aline.marache@corp.tps.fr	

TV5

131, avenue de Wagram
Paris Cedex 17
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France

Tel: +33 (0)1 4418 5516

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
TV5 Monde	Mr Christophe ASSEZAT	In charge of acquisition - fiction and documentary	christophe.assezat@tv5.org	33 1.44.18.55.47. dr
TV5 Monde	Mrs Marjorie VELLA	In charge of acquisition - cinema	marjorie.vella@tv5.org	33 1.44.18.55.55

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
TV5 Monde	Mr Frederic BOULET	Director of programming	frederic.boulet@tv5monde.org	33 1.44.18.55.55.

USHUALA TV

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ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Ushuaïa TV / Ushuaïa TV	Ms Annabel GAIN	HD Head of Acquisitions, Odyssée & Ushuaïa TV	again@tf1.fr	33 1.41.41.12.34.
Ushuaïa TV / Ushuaïa TV HD	Mr Armand DUBRUEL	In charge of acquisition - TV Breizh, Odyssée, Ushuaïa	adubruel@tf1.fr	
Ushuaïa TV / Ushuaïa TV HD	Mlle Magali SEGUIN	Acquisition Odyssée / Ushuaia TV	mseguin@tf1.fr	

COMMISSIONING EDITORS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Ushuaïa TV / Ushuaïa TV HD	Mlle Reine-Valérie Bensaïd	Responsible of the emission and programming	rvbensaid@tf1.fr	

VIRGIN 17

ACQUISITIONS

CHANNEL	NAME	POSITION	EMAIL	TELEPHONE
Virgin 17 (Ex. Europe 2 TV)	Mlle Cécile MERCIER	In charge of acquisition	cecile.mercier@mcm.fr	

UNITED KINGDOM

In 2008, the public service channel BBC 1 was still the service most watched by all UK households (21.8% audience share, just one percentage down from 2 years ago), followed by ITV1 (18.4%). The phenomenon of the erosion of the incumbent channels' market share continues at the same time as the increase in the penetration of multichannel offerings. The audience shares of BBC2, Channel 4 and five are also gradually declining.

(Audience data source: Eurodata TV Worldwide / BARB / TNS UK)

Partly in order to compensate for the drop in the audiences of their main channels, BBC, ITV, Channel 4 and five have enlarged their portfolios of digital channels, with Channel 4 launching 4Music and More4 to complement E4 and Film4 and ITV launching ITV4, CITV and ITV Play after ITV2 and ITV3. In October 2006, five launched five Life (now renamed fiver) and five US.

Analogue broadcasting in the United Kingdom is to be switched off in regional stages between 2008 and 2012. The first major stages in the transition began in 2008. Switch-off will have taken place in 20% of homes by the end of 2009. In July 2008, Ofcom issued a call for applications for the allocation of two HD licences on the B multiplex, with a third HD licence HD reserved for the BBC. The broadcasters that have DTT HD licenses are Channel 5, BBC, ITV, and Channel 4/S4C. HDTV will be launched on the DTT platform region by region (coinciding with the switch-off process) from December 2009.

The United Kingdom has one of the highest digital penetration rates in Europe. Ofcom's Communications Market Report 2008 shows that at the end of 2008, 87.1% of all households received digital TV (at the end of Q1 2009 this had reached almost 90%), i.e. 22.7 million homes. This is mainly accounted for by the high levels of DTT uptake, and also that of digital satellite. At the same time the digitisation of cable services network had reached 96%.

In March 2009, the breakdown for means of reception of the main TV sets was as follows: 9.8 million households received digital terrestrial television (only), 9.4 million satellite and 3.65 million cable. Digital terrestrial television has thus become the country's primary digital platform. In March 2009, Freeview (a free-to-air digital terrestrial platform) was received by about 9.7 million households and Top Up TV (a digital terrestrial pay-TV platform) had 0.2 million subscribers. The 9.4 million households that mainly receive television by satellite are split between subscribers to BSkyB (over 8.9 million households at the end of March 2009) and households that receive a free-to-air satellite service. In May 2008, the BBC and ITV launched Freesat, a free-to-air digital satellite distribution platform that permits access to about 80 television channels and radio stations. In March 2009, about 500,000 households were receiving programmes in this way.

The main cable operator, Virgin Media, controls more than 90% of the cable market and has launched the country's first "quadruple play" service (television, broadband internet, fixed-line and mobile telephony). At the end of 2008, Virgin Media had approximately 3.6 million cable customers, of which 3.5 million had digital cable services.

IPTV is not a significant platform in the UK. The main IPTV television providers are the company Video Networks (Homechoice), which was bought by Tiscali in 2006, and the incumbent telecommunications operator BT (BT Vision). In May 2009 Tiscali UK was then sold to the Carphone Wharehouse Group UK. There are no recent figures available for the Tiscali IPTV service subcribers. In March 2009, Ofcom estimated the number of households that mainly receive their television by ADSL at about 100,000 (50% more than 2008). This figure does not include all the subscribers to BT Vision, some of whom receive programmes transmitted via digital terrestrial television and not via the internet. By the end of March 2009, the total number of subscribers to BT Vision was about 423,000.

In response to a request made in March 2007 by BT, Setanta, Top Up TV, and Virgin Media, Ofcom opened a new investigation into the pay-TV market, which comprises the television-on-demand and subscription services available on all platforms, i.e. cable, digital terrestrial, satellite and ADSL TV. The investigation examined control over content, ownership of distribution platforms, retail subscriber bases and vertical integration. A second consultation on this issue was launched in May 2009. It is Ofcom's opinion that Sky has gained a position of market power regarding both premium sports and movies. The proposals under discussion include: the separation of standard film rights from video on demand rights; and reviewing the method for allocation of football rights.

The satellite operator Setanta experienced a financial crisis in 2009. While the Irish operation survived, Setanta UK dissolved and the channels ceased transmitting in the UK in June 2009. The football rights held by Setanta UK were taken over by the US company ESPN (owned by Disney).

In April 2008, the European Commission launched an investigation under EC Treaty state aid rules into state aid proposed by the UK authorities for Channel 4 to help it meet the capital costs of digital switchover. The Commission wanted to investigate whether this subsidy threatens to distort competition in the Single Market. In October 2007, the UK authorities notified to the Commission their proposal to grant GBP 14 million (EUR 21.2 million) of aid to Channel 4 to assist it to meet the capital costs of digital switchover. In November 2008, the UK government decided to abandon this proposal and instead examine switch-over costs in the context of the broader initiatives for Digital Britain.

In May 2009, the UK broadcasting regulator Ofcom announced further changes to the rules on advertising and tele-shopping in an ongoing review of advertising regulation. The long term aim is to harmonise the rules on amount of advertising applying to private and public broadcasters.

Debates on public service continued with the second Ofcom public service review and the publication by the UK government of "Digital Britain" in January 2009. One major proposal involves the establishment of a second public service organisation alongside the BBC. This could involve a merger of Channel 4 and BBC Worldwide but this has yet to be decided.

In March 2009, the UK government announced plans for implementing the Audiovisual Media Services Directive. In September 2009 the UK Culture Secretary announced that the ban on product placement would be lifted for commercial television channels. For non-linear/ video on demand services, a co-regulatory system will be established with the industry. The government also announced plans to ensure that non-EU satellite television channels uplinked from the UK will be required to have a broadcasting licence issued by Ofcom.

Source: European Audiovisual Observatory Mavise Database (http://mavise.obs.coe.int/)

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The Broadcasting Act 1990 requires that Channel 4 programmes shall: appeal to tastes and interests not generally catered for by ITV, encourage innovation and experiment, be distinctive, maintain a high general standard and a wide range, include a proportion which are educational, provide high quality news and current affairs, include proportions which are European and are supplied by independent producers.

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S4C has a statutory obligation to broadcast a majority of Welsh language output during peak viewing hours (1800 - 2200). The schedule provides a wide variety of popular TV - drama, entertainment, sports, music, news and current affairs, games and quizzes, youth and children's programming.

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IRELAND (Éire)

The Irish television market is characterised by a strong national public service broadcaster and a strong presence of British channels. The two public service channels, RTÉ1 and RTÉ2, had a combined market share of 36.5% in 2008 (2% less than in 2006). The private channel, TV3 (launched in 1998) had an 11.4% market share, close to that of RTÉ2, with 11.5%. The five most watched UK channels are ranked in the following order: BBC1, UTV, S4C, BBC2, and Sky 1 (with a combined share of 19.1%).

According to data from ComReg for the first quarter of 2009, 61% of Irish households receive digital television. Pay-TV households reached 1.09 million (75%), divided between satellite and cable/MMDS. The UK satellite packager BSkyB had 578,730 subscribers (53% of pay TV market) in the first quarter of 2009. The success of this package has partly been due to the lack of any alternative for reception of digital television (and/or pay-TV) outside of the main cities and towns.

The cable market is controlled by one operator UPC Ireland (following the takeover by Liberty Global of the second operator, NTL and its merger with Chorus). According to ComReg approximately 54% of cable services are now digital, and Liberty Global's annual report 2008 claimed a total of 450,100 cable customers. So far there has been no strong development in the IPTV market, although there are three operators (Magnet networks, 3Play Plus, and Smart Telecom) providing IPTV services in Ireland. There is no data available on IPTV subscribers, while broadband Internet had a reach of 60.4% in March 2009.

At the beginning of 2007, the network operator Arqiva and the mobile telephone operator O2 launched the first commercial personal mobile television trial in the DVB-H format, involving 350 users in the Dublin area. Following various trials and a consultation by the regulator ComReg, it was announced in August 2009 that a tender would be launched at the end of 2009 to use part of the UHF band for mobile TV services.

The introduction of DTT experienced a set-back in 2009. In March 2008, the tender for three commercial multiplexes was awarded to the Boxer Communicorp consortium by the Broadcasting Commission of Ireland (BCI). However, in April 2009 Boxer handed back its license. They claimed that the reasons were the failure to reach an agreement with RTÉ Networks Limited, the operator of the public service multiplex, and also the financial crisis in Ireland. In May 2009, the BCI then granted the licenses to the consortium that reached second place in the tender: One Vision (including TV3, Eircom and Setanta). One of these partners, the satellite packager Setanta has faced a financial crisis in June 2009. In July the ownership structure changed with Gaiety Investments increasing its shareholding from 20% to 60%. Setanta Ireland continued its Irish operations, while Setanta UK went into liquidation.

The new Broadcasting Bill was finally passed in the Irish Parliament in June 2009 (after which it moved to the second House, the Seanad). The Bill consolidates all previous broadcasting legislation into one Broadcasting Act. Following the conclusion of the European Commission investigation (2005-2008) into the financing of Irish public service broadcasters RTÉ and TG4, the Irish government had committed to guarantee precise public service remits; explicit entrustment of new activities; independent supervision; transparency of accounts and enhanced controls. The Broadcasting Bill establishes that a new broadcasting regulatory authority (the Broadcasting Authority of Ireland – BAI) will be established replacing the existing Broadcasting Commission of Ireland (BCI) and Broadcasting Complaints Commission (BCC). The BAI will assume responsibility for the regulation of public service broadcasters in Ireland, although the Minister will continue to retain an oversight role in respect of certain matters. The Bill also proposes the creation of two new public service channels: an Irish film channel and a parliamentary channel (Oireachtas).

Source: European Audiovisual Observatory Mavise Database (http://mavise.obs.coe.int/)

*Update 2010

The Broadcasting Authority of Ireland (BAI) was established on 1st October 2009 following the enactment of the Broadcasting Act 2009. (http://www.bai.ie)

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Radio Telefís Éireann is Ireland's state owned public service television network and is broadcast on two channels: RTÉ One and RTÉ Two. They are financed by license fees, advertising and some commercial activities. RTÉ One is a mainstream news, information and entertainment channel. RTÉ Two is primarily aimed at a younger audience and carries all of RTÉs sports coverage. Both channels transmit by cable and terrestrial network. Total annual hours of transmission: 17520.

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