



*Drama*Directory

Your guide to European TV Drama Commissioning Editors and Buyers

2017
UPDATE



Creative
Europe
MEDIA

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INTRODUCTION

The European network of Creative Europe Desk MEDIA offices is delighted to publish this updated edition of the Drama Directory, a Guide to European TV Drama Commissioning Editors and Buyers.

The Guide is intended as a tool for TV producers in search of co-financing or TV sales for their Drama projects. In particular we hope it will be of assistance to potential applicants of the Creative Europe MEDIA Television Programming support scheme which requires a minimum of three pre-sales to European Broadcasters and a clear distribution strategy for circulation in Europe and beyond.

The production of this Drama Directory is a true European collaboration with each Creative Europe Desk providing the information on the TV Market and the TV Channels in its own territory.

We would also like to take this opportunity to thank the participating Broadcasters for their generosity in providing the information contained in this Directory and the European Audiovisual Observatory for allowing us to use information from the MAVISE database.

We hope the Drama Directory will continue to be a useful resource for Television Drama Producers and Broadcasters alike. We welcome your feedback and suggestions for future editions.

THE CREATIVE EUROPE DESKS – MEDIA OFFICES



HBO EUROPE

HBO Europe is a premium pay television service operating in 3 Central European Countries: Czech Republic, Slovakia, Hungary and also 11 Eastern European countries: Poland, Romania, Bulgaria, Slovenia, Kosovo, Bosnia and Herzegovina, Croatia, Moldova, Macedonia, Montenegro and Serbia.

HBO has been available in the Netherlands as well. It was a joint venture between Time Warner and cable company Ziggo. It launched on 9 February 2012 but closed on 31 December 2016. Ziggo has acquired the broadcasting licenses of HBO content for the Dutch market.

The first service launched by HBO in Europe was HBO Hungary, which launched on September 28, 1991. This was followed by the launch of HBO Czech in 1994, HBO Poland in 1996, a launch in Slovakia in 1997, HBO Romania in 1998, launch of HBO Romania in Moldova in 1999, HBO Bulgaria in 2002, HBO Adria in Croatia and Slovenia in 2004, HBO Serbia in Serbia, Bosnia and Herzegovina and Montenegro in 2006 and HBO Macedonia in Macedonia in 2009.

HBO Europe is also one of the largest producer companies for television in Central and Eastern Europe, operating HBO Europe Original Programming Ltd., headquartered in London, producing several local original scripted

programming and series based on licensed formats. Licensed formats include *BeTipul (Bez tajemíc, Terapie, Terápia)*, *Small Time Gangster (Umbre)*, *Mammon (Mamon, The Pact)* and *When Shall We Kiss? (Társas játék, Rămâi cu mine, Až po uši)*.

HBO Europe has offices in: United Kingdom, Croatia (HBO Adria - regional office for Croatia, Slovenia and the Balkans located in Zagreb), Poland, Slovakia, Czech Republic, Bulgaria, Romania and Hungary

HBO Nordic is an online service for viewers in Sweden, Norway, Denmark and Finland. The entire HBO catalogue is available to stream including over 150 TV series. HBO Espana offers a similar service for Spain and also commissions local fiction programming.

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AUSTRIA

The most important broadcasting groups in Austria are the following:

- Public Service Broadcaster ORF - ÖSTERREICHISCHER RUNDFUNK is the most important player with 10 channels and 16 regional windows (including 3sat, generalist, cultural, HD and sport channels);
- The channels of the Luxembourg based RTL Group;
- The channels of the German ProSiebenSat.1 Media SE;
- The channels of German public broadcaster ARD;
- It is followed by the German public broadcaster ZDF.

There are 63 on demand services established in Austria including the catch-up TV services of the main national broadcasters ORF (e.g. ORF-TVthek), Puls 4 (ProSiebenSat.1 Media SE), ATV and Servus TV (Red Bull GmbH). Main distribution companies such as Telekom Austria and UPC also offer on demand services of their own. The SVOD service Amazon Prime Instant Video (Austria) became available in Austria in November 2014 following previous launches of the service in the US, the UK, Ireland and Germany.

The distribution of the TV services in Austria has remained constant for some years, according to data by the Austrian regulatory authority KommAustria. The main satellite packagers are Austria Sat (M7 Group), the ORF with its "ORF Digital" offer and Sky Österreich (Sky

Plc.). The main cable operator is UPC Austria (Liberty Global) and the almost exclusive IPTV service is "A1 TV Plus" by Telekom Austria. The pay-DTT service "simpliTV" was launched by the ORF in April 2013.

The main legislative acts relevant to the media in Austria are the Federal Act on Audiovisual Media Services (Audiovisual Media Services Act – AMD-G), the Federal Act enacting provisions for private radio broadcasting (Private Radio Broadcasting Act – PrR-G) and the Federal Act on the Austrian Broadcasting Corporation (ORF Act).

There are two regulatory bodies relevant to the audiovisual market. The Austrian Communications Authority (KommAustria) is the regulatory authority for electronic audiovisual media in the country and the Telekom-Control-Commission (TKK) is responsible for regulating the Austrian telecommunications market.



Madame Nobel (c) 2014 Monafilm. Supported by Creative Europe-MEDIA, Funding Scheme: TV Programming. Directed by Urs Egger.

ORF

ORF is an independent public service broadcasting corporation. It has four national TV channels: ORF1, ORF 2, ORF III, ORF Sport+, four national and nine regional radio stations, all financed by license fees and advertising. The TV channels are complementary and are transmitted by terrestrial network as well as satellite in collaboration with 3sat.

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AUSTRIA

BELGIUM

The Belgian audiovisual sector has the particularity of having three distinct audiovisual markets (French, Flemish and German speaking) each regulated by a different regulatory authority. For the French Community, the regulator is the Belgian CSA (Conseil Supérieur de l'Audiovisuel), for the Flemish Community the regulator is the VRM (Vlaamse Regulator voor de Media) and in the German community the regulator is the Medienrat.

French Community (CFB)

In the French Community (which now refers to itself as the "Federation Wallonie-Bruxelles"), the main operators of television channels are, apart from RTBF (La Une, La Deux and La Trois), the RTL group, with its three channels RTL-TVI, Club RTL and Plug RTL and the French group AB (AB3, AB4 and AB Shopping). RTBFs market share rose significantly in 2016 (24.3% compared with 21.9% in 2015). Despite a decline, RTL-TVI continues to dominate the market with a 19.2% daily audience share in 2016 (20.1% in 2012). The second most important Belgian channel is La Une (RTBF), with a 17% market share. La Deux once again exceeded the 5% mark (6% compared with 4.8% in 2015). The other Belgian channels have a share of less than 5% (Club RTL, Plug RTL, Be TV, etc) and a significant number of viewers still turn to the French channels like TF1 with 15.4% in 2016, France 2 with 5.9% or France 3 with 4.6%.

Flemish Community (VLG)

The main players in the Flemish Community are VRT (public channels: Één, Canvas and Ketnet), the commercial group MediaLaan (channels: VTM, Q2, Vitaya, CAZ, vtmKzoom and Kadet) and SBS Belgium (channels: VIER, VIJF and ZES plus directing channels: Discovery, TLC, Play Sports and njam!).

Één (VRT) continues to dominate the market, although last years it lost marketshare on the younger targetgroups. Right behind Één in audience terms is VTM. So on the young target both channels tend to be equal. VIER follows on the third place. These 3 main channels focus on (Flemish) entertainment. Één and VTM have also have a big news department. VRT and MEDIAALAN have a second channel with a slightly different focus: Canvas that focusses on information, culture and sports, and Q2 with series, films and Champions League. Together with the 2 big female skewed and programmed channels, VIJF and Vitaya, all these generalistic channels take about 84% of the total viewers market. CAZ and ZES, both launched in October 2016, are the only other channels that reach more than 1% market share.

The rest of the market is split between a number of special interest channels set up in the Flemish Community as well as French and Dutch language channels, f.e. kids channels (Ketnet, vtmKzoom, Kadet, ...) or adventure channels (Discovery, National Geographic, ...).

Both Proximus and Telenet offer VOD catalogues and pay-tv subscriptions. The former coming with the option of adding a Netflix subscription to the Proximus package. Telenet and Proximus are by Flemish Media Decree obliged to invest in Flemish tv coproductions. Aside from that, Telenet over the past years has been increasingly active in purchasing preview rights for Flemish tv series, shown to Telenet subscribers, prior to free-to-air broadcasting.

Source: All data are live+7, 2016, CIM audimetrie.



The Spiral. Produced by Caviar, Belgium. Developed with the support of the MEDIA Interactive support scheme.



BTV (BELGIUM TELEVISION SA)

Created in 2011, BTV operates 2 generalist channels in the South of Belgium. AB3 is devoted to fiction (67%) and entertainment for an audience aged 15-34 year old. AB4 focus on fiction (59%) like cult movies and classical series towards an older audience (35+).

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BELGIUM (FRENCH-SPEAKING)



BETV

Owned by cable operator Tecteo, BeTV offers a digital package of thematic channels (pay TV), Be Premium, including cinema (Be1, Be Ciné), series (Be Series) and sports (Be Sport 1, 2 and 3). It also distributes specialized services (Be Enfant, Be Documentaires, Be Charme) as well as a VoD catalogue. 61% of the programming on Be1 is made of films. Most of its acquisitions come from Canal + France.

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BELGIUM (FRENCH-SPEAKING)

RTL-TVI – CLUB RTL – PLUG TV

RTL, a subsidiary of CLT-UFA/RTL Group, operates 3 channels in French-speaking Belgium. RTL-TVi is a generalist channel combining news programmes, entertainment, commercial films and series (mainly American). Until recently, Club RTL was focused on niche programme for kids, series and films but now it plans to go more mainstream. Plug addresses young adults with series, cult movies, reality shows and music programmes.

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RTBF

RTBF, the public broadcaster in the French-speaking community, operates 3 channels: la Une, la Deux, la Trois. La Une is focused on information, entertainment and generalist programmes. La Deux is more oriented towards series and sports. La Trois is a children's channel in the daytime and a more cultural one (documentaries & films in original version) in the evening.

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BELGIUM (FRENCH-SPEAKING)

VRT ÉÉN, CANVAS, KETNET

VVRT is Belgium's Dutch-language public broadcaster of the Flemish community in Belgium. VRT consists of the family entertainment channel Één, the youth channel Ketnet and Canvas, which is an informative and cultural channel with a strong documentary profile.

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BELGIUM (FLANDERS)



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BELGIUM (FLANDERS)



BULGARIA

The most important players in the broadcasting sector in Bulgaria are the following: the bTV Media Group (owned by Central European Media Enterprises) with 6 channels (including generalist, film, entertainment, HD, and sport channels) had close to 40% of the daily audience share in 2014. The company also owns the Bulgarian version of the SVOD service Voyo. Its main channel bTV is the most watched channel in Bulgaria; the second significant player in the market is the Nova TV group (part of the Swedish Modern Times Group) with 7 TV channels (including generalist, film, entertainment, HD, and sport channels) and a total audience share of more than 25% in 2014. Its main channel Nova TV is the second most popular channel; the public service broadcaster BNT has three national channels and one international channel. The broadcaster had a total audience share of less than 10% in 2014.

Bulgaria has also become an important hub for pan-European channels targeting the Balkan region in Europe. It is the home of the Fox channel brands and National Geographic channels targeting Albania, Bosnia and Herzegovina, Kosovo, Serbia, Slovenia, Croatia and Montenegro.

There are 22 on-demand audiovisual services established in Bulgaria including the catch-up TV services of the main broadcasters. The main distribution companies (see below) also offer on-demand services of their own, alongside third party services such as HBO on Demand and Voyo. Voyo is the SVOD service of the bTV Group (part of the Central European Media Enterprises). Netflix also became available in Bulgaria following the global launch of the service in January 2016.

Cable, satellite and DTT services provide the main distribution platforms in Bulgaria, each reaching about 29% of homes, according to data from IHS. Blizoo (cable) and Bulsatcom (satellite) are two of the most important operators. Blizoo was taken over by telecommunications operator Mtel in 2015 (and so is now part of the Telekom Austria Group). Other important cable operators include SKAT and Msat. Satellite services are also provided by Vivacom and Neterra. There are several IPTV services available with the most important provided by Mobilitel (Telekom Austria). The launch of DTT finally took place in 2013, with the switch-off completed very quickly in 2013. There are two multiplex operators carrying a total of 13 channels.

The main laws that regulate the market in Bulgaria are the Electronic Communications Act (2007) (including issues such as frequency spectrum and digital broadcasting development), and the Radio and Television Law. The media in Bulgaria is regulated by the CEM – Council for Electronic Media, who supervises both the public and the private broadcasters. Electronic communications networks are regulated by the Communications Regulation Commission.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



TV7

TV7 is a Bulgarian polythematic television channel with a national coverage. It is the main channel in the group of channels TV7, NEWS7 and SUPER7 which starts its broadcasting at the end of 2005. Since 2013 the program of the television is being processed digitally on the territory of the whole country while reaching 96.2% of population coverage.

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BULGARIA



bTV

bTV is the first private national TV station in Bulgaria.

bTV's program was broadcast for the first time on June 1st 2000, those breaking the monopoly of the public national TV station and changing entirely the media environment in Bulgaria. For 12 years bTV firmly established itself as the most watched TV channel in Bulgaria with nearly 40% share of all viewers and with leading positions on the advertising market.

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BULGARIA



NOVA TV

In 2008 NOVA TV became part of Modern Times Group (MTG). At the beginning 2011 NOVA, DIEMA, DIEMA 2 и DIEMA FAMILY, NOVA SPORT, TV 1000 Balkan, Viasat History, Viasat Explore и Viasat Nature, as well as EVA magazine became part of the established Nova Broadcasting Group. The expansion continues in 2013, when the company became owner of 70 % of Darik Net and all web sites of Darik web together with the biggest digital media company in the country Netinfo.

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BULGARIA

BNT

The Bulgarian National Television (BNT) was founded in 1959 and it was the first television service to broadcast on the territory of Bulgaria. As a public service broadcaster, the main purpose of BNT is to deliver a broad range of news and programming that keeps its audience informed about important issues and events in the areas of politics, economics, business, culture, science and education. BNT operates four regional production centres in the cities of Blagoevgrad, Varna, Plovdiv and Rousse. In 1999, BNT launched the satellite channel 'TV Bulgaria' designed mainly for Bulgarians living abroad. At the end of 2010, the channel was renamed 'BNT World'. Channel BNT2 was launched in 2011. It pooled together the programming of the four regional centres. It is available free-to-air in the major cities in Bulgaria. BNT gives its viewers the benefit of emerging communications technologies and services and it was one of the earliest Bulgarian Media on the 'World Wide Web'.

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CYPRUS

The most important broadcasters in Cyprus include several Greek companies who broadcast local versions of the main Greek channels.

Antenna TV (an example of a Greek broadcaster with a local version of its main channel) was just ahead of the others with a daily audience share of around 19% in 2014. Sigma TV was in second place with a daily audience share of close to 17% in 2014. The public service broadcaster CyBC has three channels and they had a combined daily audience share of 16.5% in 2014. In fourth place is another Greek company, Teletypos with 15% audience share.

There are 27 on-demand audiovisual services established in Cyprus including the catch-up TV services of the main broadcasters. The main IPTV and cable operators (Cyta, Primetel and Cablenet) also offer on-demand services of their own. The international film VOD service MEGOGO is established in Cyprus and has various national versions targeting other countries (such as the Ukraine, Russia, the Czech Republic, Estonia, Georgia, Latvia and Lithuania). The VOD service Banaxi is also established in Cyprus and is available in Cyprus, Hungary, Poland, Serbia, the Czech Republic and Slovakia.

According to data from IHS, digital terrestrial television (DTT) and IPTV are the most important distribution platforms in Cyprus. There are two operators of DTT — the Cyprus Broadcasting Corporation (with public channels), and Velister Ltd (with private channels). The free service is used in 57% of homes. The pay-DTT service, Lumiere TV, closed in 2014.

The only satellite package available is the Greek Nova TV package, but satellite does not play any significant role in the market.

The Law on Radio and Television Broadcasting N. 7(I)/1998 (amended 2009) is the main legal framework for commercial broadcasting in Cyprus. The legal basis for public service broadcasting in Cyprus is the Law on the Cyprus Broadcasting Corporation (2010). The broadcasting sector is supervised by the Cyprus Radio-Television Authority, an independent body, in charge of licensing procedures and the monitoring of broadcasting.



CYPRUS BROADCASTING, CORPORATION (CYBC)

CyBC is a generalist channel broadcast by the Cyprus Broadcasting Corporation. It has national coverage and is broadcast in Greek. It is a free HD public channel, broadcast over the DTT network.

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CYPRUS



ANT1 TV

Launched in 1993, Ant1 TV is an analogue terrestrial generalist channel with national coverage, broadcast in Modern Greek. The channel is free and active 168 hours per week. Ant1 TV is a sister channel of ANT1 TV (Greece). It was the first private channel to be launched after Cyprus broadcasting liberalisation.

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MEGA is a private Digital terrestrial channel. It is a generalist channel broadcasting in modern Greek.

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CYPRUS



SIGMA TV

Sigma TV is the main private TV channel in Cyprus and main TV channel in Cyprus in terms of audience. SIGMA has a programmes deal with the Greek channel SKAI Channel. Sigma targets mainly young urban adults. SIGMA prime time schedule is composed of local (40%) US (25%), mainland Greek (15%) and other (20%) programming. It has free national coverage, active 168 hours a week and is broadcast in Modern Greek.

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CYPRUS

CZECH REPUBLIC

The Czech TV landscape is dominated by three groups: public service broadcaster Česká Televizí (CT) manages six television channels. CT accounts for 30% of the audience share in 2014; private broadcasting group Central European Media Enterprises (CET 21), a subsidiary of Time Warner operating also in Bulgaria, Croatia, Romania, Slovakia and Slovenia, owns the leading TV channel TV Nova and 5 thematic channels, with a 32% total audience market share; a joint-venture between Sweden-based Modern Times Group (SE) and FTV Prima runs the “Prima” family of TV channels, with a 21% audience share. Other significant broadcasters include TV Barrandov and Walt Disney.

The Czech Republic is also an important European centre for pan-European channels. A large number of channels are licensed here which target Central and South-Eastern Europe. The on-demand services of HBO, available throughout Central and South-Eastern Europe, are also registered with the Czech regulatory authorities.

By the end of 2015, 34 pay video-on-demand services were available in the Czech Republic. Among these pay VOD services, 27 were established in the Czech Republic. Major players in the VOD Czech market include national versions of iTunes, Netflix, HBO competing with the main national subscription-VOD service VOYO, controlled by Central European Media Enterprises.

In 2014, TV reception is almost fully digitized, with 91% of the 4.6 million households accessing digital TV. DTT is the first TV reception network, serving close to 42% of the households and proposes only free services. Satellite serves 33% of households, with 13% subscribing to a pay-service (Skylink (M77), Digi TV Czech Republic). Cable serves 15% of households, but only 10% access digital cable. The main cable operator is UPC. IPTV is used by 6% of households (Deutsche Telekom).

The audiovisual sector is governed by the ACT No. 231/2001 of 17 May 2001 on Radio and Television Broadcasting. The regulatory Authority RRTV (Council for Radio and Television Broadcasting) has responsibility for the regulation of the audiovisual sector. Public service broadcaster Česká Televizí's missions are defined through the Česká Televizí “code” elaborated by the Czech Television Council and approved by the Czech Parliament in 2003. The Czech Television Council is the supervisory authority for the public service broadcaster.

ČESKÁ TELEVIZE (CZECH TELEVISION)

Česká televize is Czech public service broadcaster. It is financed mostly from television licence fees, partly from business activities. It broadcasts on six channels: ČT1, ČT2, ČT24 (news channel), ČT sport (sport channel) and the newly launched ČT :D (children channel) and ČT Art (culture channel). While ČT1 is a family-oriented channel showing original Czech movies, series, entertainment and lifestyle, ČT2 offers documentaries, nature-oriented shows and foreign films and series. ČT :D is a children's educational channel, launched 31. 8. 2013, which broadcasts from 6am until 8pm. ČT art is a channel focusing on culture, theatre, operas, music, art films, launched 31. 8. 2013, which broadcasts from 8pm until late night.

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CZECH REPUBLIC

TV NOVA

CET 21 is a private broadcaster which broadcasts on eight channels: Nova, Nova Cinema, Nova Action, Nova 2, Nova Gold (free channels), Nova Sport 1, Nova Sport 2, Nova International (premium channels). The programming of Nova is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Nova Cinema offers mostly feature films and TV series.

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CZECH REPUBLIC

PRIMA TV

FTV Prima is a private broadcaster which broadcasts on five channels, Prima, Prima COOL, Prima MAX, Prima Love and Prima ZOOM. Prima's programming is composed of news, current affairs, films, original and acquired TV series, documentaries and entertainment programmes. Prima COOL is an entertainment channel broadcasting mainly American films, TV series, sport and entertainment programmes. Prima Love is a channel targeted at women, broadcasting films, TV series and talk shows. Prima ZOOM is a new channel, launched 1. 2. 2013, broadcasting mainly foreign documentaries.

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CZECH REPUBLIC



HBO CZECH REPUBLIC

HBO Czech Republic is the Czech subsidiary of Home Box Office (HBO). It is transmitted by cable and satellite networks and it broadcasts mostly feature films, TV series and documentaries. It operates several channels: HBO, HBO2, HBO3, Cinemax and Cinemax2..

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CZECH REPUBLIC



DENMARK

Denmark is the only European market in which public channels, operated by the two public broadcasters, DR and TV 2, still attract more than half of average daily audiences. The TV 2 channel continues in 2016 to dominate the market (24.3 % audience share), followed by DR1 (22.8%). The two main public channels therefore account for 47.1 % of average daily audiences in 2016. Because of the creation of various special-interest channels, the entire public owned channels saw their total audience grow from 65.6% in 2010 to 71.7% in 2016. The most popular private channel is TV3 (Swedish MTG Group), with a daily market share of 4.8%. The other main private channels are Kanal 5 (Discovery Networks Denmark, 3.8% daily audience share) and TV3+ (MTG Group), whose daily audience share was 2.7% in 2016. (Audience Data Source: Kantar Gallup – TV-Meter).

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



Seaside Hotel season 4 (2017). Produced by TV2 Danmark A/S



Below the Surface (2017). Produced by SAM Productions for Discovery Networks

DR TV

DR (Danish Broadcasting Corporation) is Denmark's oldest and largest electronic media enterprise. The corporation was founded in 1925 as a public service organization and the TV channel in 1951. DR does not possess any RTB license but has signed a public service contract with the Ministry of Culture. The channel is completely financed by public revenues (there are no advertising revenues). DR TV comprises two main channels, DR1 and DR2 - and four channels from November 2009: DR K (Culture, history, music), DR Ramasjang and DR Ultra (Children's programming) and DR3 (Youth). Over the years DR has built up a strong fiction brand, especially on Sunday evenings at 20h. DR has produced a number of award winning TV series, such as The Legacy (2014-2017), Follow the Money (2016), The Bridge (2011, 2013, 2015), Government (2010-2013), The Killing (2007-2012), The Protectors (2009), Unit One (2000-2001), Nikolaj & Julie (2003), The Eagle (2005) and Young Andersen (2005).

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DENMARK

TV2

TV 2 DANMARK A/S is owned by the Danish state and the public service channel TV 2 is operated on a commercial basis. Until 2004, TV 2's main channel received a smaller share of the license fees. Since 2012, the main channel TV 2 has been partially funded by subscription. TV 2's overall share (20-60) is 26.3% and the commercial share (20-60) is 40.9% (2016). TV 2 DANMARK A/S is the company behind Denmark's most-watched channel, TV 2, and behind the country's most-watched channel family known as TV 2 NEWS, TV 2 ZULU (targeted at youth), TV 2 CHARLIE (oriented towards a more mature audience), TV 2 FRI (leisure channel), TV 2 SPORT and the on-demand service TV 2 PLAY. In recent years TV 2 has aired a number of successful Danish TV fiction series, such as Seaside Hotel (2013-2017), Rita (2011-2017), Norskov (2015-2017), Home Sweet Home (2016), Splitting Up Together (2016), Sjit Happens (2013-14), Dicte (2013-14) and Something's Rockin' (2017) (all MEDIA supported).

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TV3

TV3 is a commercial channel owned by Modern Times Group (MTG) and broadcasted from the UK. The channel portfolio includes an additional four sister channels (TV3+, TV3 PULS, TV3 Sport 1 and TV3 Sport 2). The channel profile of TV3 is focused around Danish produced entertainment and American blockbuster feature films as well as co-produced Danish and Scandinavian fiction series such as Black Widows (2016) and Forbandet (2016) with more Scandinavian – and Danish projects in the pipeline.

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DISCOVERY NETWORKS DENMARK

Discovery Networks Denmark is part of the Northern European branch of the global Discovery Networks International. The Northern European region includes Ireland, Iceland, Sweden, Norway, Finland, Denmark, the Benelux and the UK and serves 18 countries, comprises 28 channel brands and reaches 69 million viewers monthly. Discovery Networks Denmark comprises 12 TV channels: Kanal 4, Kanal 5, 6'eren, ID - Investigation Discovery, Eurosport, Eurosport Danmark, Canal 9, Discovery Channel, TLC, Animal Planet, Discovery World, Discovery Science and the streaming service Dplay. Recently Discovery Networks Denmark has co-produced the fantasy series Heartless (2014-2015) and the thriller series Below the Surface (Gidseltagningen) (2017). Both airing on the main channel Kanal 5 and Dplay.

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DENMARK



ESTONIA

The three main broadcasting groups in Estonia are:

- Eesti Media group (which purchased in 2013, all the Estonian assets of the Norway-based group Schibsted) is operating 3 channels, including the leading TV channel Kanal 2.
- The public service broadcaster Eesti Rahvusringhääling (ERR), operating 4 TV channels in total, including the 2nd most popular TV channel in terms of audience share, ETV.
- The Sweden-based Modern Times Group (MTG), operating 8 channels, including the 3rd ranking TV channel in terms of audience shares, TV3 Estonia.
- Other significant broadcasters include the Baltic Media Alliance, based in the United Kingdom, and Russia-based Channel One.

By the beginning of 2016, there were 42 on-demand services available in Estonia, including 19 pay TVOD and SVOD services. The main players were the national versions of iTunes and Netflix, the Russian version of Viewster also has a limited offer of national catch-up TV services.

By the end of 2014, 84.3% of TV households accessed a digital television services. Cable served 37.6% of households, but was not fully digitized: 11.8% of households still subscribed to analogue cable. The main cable-operators are Starman, STV and Telset. With a penetration of 27.2%, Estonia was one of the countries with highest penetration of IPTV, operated by Telia. DTT served 21.4% of the population, offering a combination of free channels and a pay-package (Starman). Satellite was the primary access for television for the remaining 9.8% of households, including a pay-package operated by Viasat (Modern Times Group).

The main legislative act that regulates broadcasting in Estonia is the “Media Services Act” enforced on 6th of January 2011. The regulator of the audiovisual sector is the Estonian Technical Surveillance Authority.

Public broadcaster ERR is regulated by the “Estonian National Broadcasting Act” passed on 18 January 2007. The Public Service Broadcaster is monitored by the Estonian Public Broadcasting Council.



ESTONIAN PUBLIC BROADCASTING

Estonian Public Broadcasting has two TV channels (ETV and ETV2) and five radio stations. ETV is Estonia's biggest public service TV channel. It offers programming to all age groups viewers including a daily evening news show; education, science, culture, lifestyle, current affairs and entertainment programs and sports coverage. ETV2 – the programming consists of outstanding cultural and educational broadcasts, documentaries, TV shows and films. It has a special daily children's slot and daily news broadcast in Russian.

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KANAL 2

The group consists of Kanal2, Kanal 11 and Kanal 12. Kanal 2 programmes mainly entertainment and local series. Kanal 11 has a set target group of modern women. Kanal 12 is more action and sports oriented, with the target group set as men.

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TV3

One of the channels owned by the Viasat Corporation. The group also includes sister channels TV6 and 3+. The programming is mainly entertainment with local productions and also acquisitions.

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ESTONIA

FINLAND

Finland switched to Digital Video Broadcasting (DVB) in 2007 first in Europe. Next transition to highdefinition technology (DVB-T2 & MPEG4) will mean parallel SD and HD-distribution for a long time and tie up resources. Finland's national public service broadcasting company Yle's SD broadcasts may continue as long as until 2020.

All media companies in Finland are developing increasingly interactive online and mobile services. Mobile use of media content is increasing. The media sector in Finland is undergoing the global transformation. Digitisation has changed production, distribution and reception significantly. Global and Nordic service providers, such as Netflix, HBO Viaplay and Filmnet have entered the fee-based subscription video service market.

However these changes have not radically altered the balance in the broadcasting market, where the main players remain Finland's national public service broadcasting company Yle (Yle TV1, Yle TV2, Yle Teema & Fem (since 24th of April 2017), MTV (MTV3, Sub, AVA + pay-channels) owned by Bonnier Group and the Finnish private media group Nelonen Media (Nelonen, Jim, Liv + paychannels) owned by Sanoma Entertainment Finland Ltd.

In 2016 Yle's market share of daily television viewing was 45%. Yle TV1 was the most popular TV channel in Finland (market share 28%). The second popular television channel was MTV3, its market share was 16%. Daily television viewing in Finland in 2016, including children aged four and over, was 2 h 52 min (2015: 2 h 51 min). (Source: Finnpanel). Pay-TV share in Finland is around 600 000 households. It is around 25 % of all households in 2013. (Source: Ficom)



Bordertown (YLE)



Konttori (Nelonen)



MTV Oy of Finland, part of Swedish Bonnier Corporation, is Finland's largest commercial television company. Its core is strong news offering and biggest entertainment on television and on-line. MTV's roots are firmly in television's early days in 1950s Finland, and today the free channels MTV3, Sub and AVA, and the free online service MTV Katsomo, are most popular among the nation. MTV's all premium content is now available in the new C More streaming service as well as on linear pay-TV. C More's foundation is built on strong local offering that comprises of most popular sport, domestic and international drama and movies for all ages.

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NELONEN MEDIA / SANOMA MEDIA FINLAND LTD.

Nelonen Media is a strongly developing broadcasting group reaching more than 90 % of the Finns. We bring our customers quality entertainment and sports through diverse media portfolio. Nelonen Media operates four nationwide free-to-air TV channels, AVOD and SVOD service, five pay TV channels, five nationwide radio channels, one regional radio channel, audio on-demand service and event business. Each channel and station have their own website which offer additional, program-related content. Nelonen Media is part of Sanoma Media company. Sanoma is amongst the largest media and learning companies in Europe. Our key markets are Finland, The Netherlands, Belgium and Central & Eastern Europe.

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FINLAND



THE FINNISH BROADCASTING COMPANY (YLE)

Yle is Finland's national public service broadcasting company. Yle operates three national television channels (Yle TV1, Yle TV2, Yle Teema & Fem) and six radio channels and services complemented by 24 regional radio programmes. Yle also offers online television and radio supply Yle Areena.

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FINLAND

FRANCE

The main broadcasting groups in France are:

- France Télévisions, France's public broadcaster with France 2, France 3, France 4, France 5, and France Ô;
- Groupe TF1 (Groupe Bouygues) and its private channels: TF1, NT1, HD1, LCI, TV Breizh, Histoire, UshuaiaTV, TMC and 50% of serieclub;
- Groupe Métropole Télévision with the private channels: M6, W9, 6Ter, Paris Première, Téva, M6 Music, Gironde TV and 50% of serieclub;
- Canal+ Groupe (Vivendi), broadcaster of the French pay TV channels of Canal+ and Canalsat, the news channel i>Télé and the entertainment channels C8 and CSTAR

The French SVOD market is dominated by two players, CanalPlay (Groupe Canal+) and Netflix after its market entry in 2014, claiming each around 750 000 subscribers according to various estimates. A new service aiming to compete with these 2 was launched by SFR in 2015, SFR Play for which it is too early to give subscriber estimates.

In France, 219 VOD services (varying in size and genre) and 126 catch-up TV services are available to viewers. Furthermore, branded channels by broadcasters are becoming widespread with more than 84 listed services as of December 2015. France is also home to 419 different on-demand audiovisual services, which are established in the country (147 VOD services and 140 catch-up TV services mostly).

94.2% of the 27.9 million TV households in France are digital. Over 40% of French TV households receive their television via IPTV, served by the 5 main players: Orange, Free, SFR (which was acquired by Altice's Numéricable in 2014), Bouygues Telecom and Darty Telecom.

Eight DTT multiplexes (R1 to R8) are available to French TV viewers but DTT is the primary means of reception for just 16% of TV households. The 8 public channels and 18 commercial channels can be received, with an addition of 5 national pay TV channels belonging to Groupe Canal+ (Canal+, Canal+ Cinéma, Canal+ Sport, Planète +), and Groupe M6 (Paris Première).

The audiovisual sector is governed by the *loi du 30 septembre relative à la liberté de communication*. The French regulatory authority, the Conseil supérieur de l'audiovisuel (CSA), has responsibility for all broadcasters and the legal supervision of the public service broadcaster (France Télévisions). The "cahier des charges" between the CSA and public broadcasters and the conventions between the CSA and private broadcasters ensure the fulfilment of public service goals.



The Rebound 2 (Les revenants, saison 2)
which receive MEDIA TV Programming
support in 2014.



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FRANCE



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FRANCE



FRANCE 3

National public service broadcaster with 13 regional units. The regions produce and co-produce both regional and national programmes.

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FRANCE



FRANCE 4

France 4 is part of France Télévisions, the French public national television broadcaster. Previously named "Festival" (till 2005), and specialising in theatre, opera and French-language, and other European-originated drama, France 4 is now a channel for young adults. The channel has been recently re-positioned, with children being the target audience for daytime (6.30 a.m. to 6.30 p.m.), while the evening programmes should reach young people born after 2000 and young adults. France 4 also hosts a platform for creative web content : Studio 4.o. www.france4.fr/studio-4-o/).

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ARTE FRANCE

ARTE is the French-German public television channel. Founded in 1991, it was given the mission of providing cultural programming that promotes unity and understanding among European nations. The channel is non-commercial and broadcasts without advertising. Financial support is provided through a television and radio licence fee in both countries. The channel is pioneering the marriage of television, internet and mobile networks as it continues to inspire viewers to think, explore and discover. ARTE FRANCE is the French partner in ARTE, providing 50% of the programming.

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FRANCE



ARTE GEIE

ARTE GEIE is a public television broadcaster. The ARTE Group is composed of three entities: the headquarters in Strasbourg (ARTE GEIE) and two Members responsible for programme production and delivery, which are ARTE France in Paris (ARTE FRANCE (S.E.P.T.)) and ARTE Deutschland TV GmbH in Baden-Baden (ARTE DEUTSCHLAND TV GMBH).

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FRANCE

CANAL PLUS

As a long-established partner to the French film industry, c+ screens up to 500 feature films per year, and covers the big events in the filmmaking calendar, in particular the Cannes Festival and the César and Academy Awards ceremonies. C+ offers its subscribers popular sports competitions (top domestic division, champions League . . .) To complement its bouquet of films and sports, c+ pursues an ambitious production policy under the banner CRÉATION ORIGINALE ("Original Programming"), driven by first-run TV drama and miniseries, hallmarked by daring and innovative screenwriting: SPIRAL, THE RETURNED, SPOTLESS, BRAQUO, LE BUREAU DES LÉGENDES and VERSAILLES. C+ brings viewers a range of international TV shows, featuring some of the most innovative and popular series at a global level, including HOUSE OF CARDS, HOMELAND, GOMORRA, THE AMERICANS and THE AFFAIR.

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FRANCE



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FRANCE



TV5 MONDE

Number 1 French-language channel worldwide, reaching 120 million homes across the 5 continents.

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FRANCE

GERMANY

The television market in Germany is one of the largest in Europe and it's also very competitive. In 2016 the use of tv in Germany was almost 92% which makes it still the most popular medium in German households. 98% of the population (14 yrs and up) have access to a tv screen while only 82% have access to a PC or Laptop. However, like everywhere, the German tv market faces the new challenges. 2015-2016 the two national public service channels (ARD and ZDF) have had a combined market share of 25,1 %. With a share of 13%, ZDF solidified its position ahead of ARD (12.1%) and RTL (9,7%), SAT.1 (7,3%) stay to a close level. According to a PwC prognosis, the German turnover in the tv market will be at more than 14,8 Billion Euros, including advertising, subscription and pay-tv channels and the fees of the public broadcasters. This is a mandatory fee in Germany no matter if you have a tv or not. Due in part to the broadcasting system being publicly funded, pay-TV does not have a long tradition in comparison to other countries. The acquisition of Germany's pay-TV operator Premiere AG by News Corporation (News Corp) in June 2008 and subsequent rebranding as Sky Deutschland Fernsehen GmbH & Co. KG was a step towards a more prominent position within the German market. Sky tries to position itself with own productions.

The Public Service Broadcaster ARD has 14 national channels, 16 regional channels and 31 regional windows. In addition, it operates the French-German cultural channel ARTE as well as the pan-European channel 3sat, together with the ZDF, ORF and SRG SSR. The Public Service Broadcaster ZDF has nine generalist and thematic channels.

There are 278 on demand services established in Germany including the catch-up TV services of the main broadcasters ARD and ZDF, RTL, SAT.1 and ProSieben. The main distribution companies Kabel Deutschland and Unitymedia KabelBW also offer on demand services of their own alongside third party services such as Maxdome. Netflix became available in Germany in September 2015 and Amazon Prime is also available.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission. Last update: February 2016 <http://www.kek-online.de/medienkonzentration/zuschaueranteile.html>



Babylon Berlin, 2016 – Production Company: X Filme (supported by the Creative Europe MEDIA TV Programming scheme, 1 Million Euro), Director: Tom Tykwer, Hendrik Handloegten and Achim von Borries (DE). © X Filme/Frédéric Bartier



Clash of Futures – 18, 2017 – Production Company: Looks Film, Les Films d'ici (supported by the Creative Europe MEDIA TV Programming scheme, 500.000 Euro) © Ricardo Vaz Palma/IRIS, Looks Film & TV GmbH

ARD – DAS ERSTE / DEGETO

ARD (full name: Arbeitsgemeinschaft der öffentlich-rechtlichen Rundfunkanstalten der Bundesrepublik Deutschland – Consortium of public broadcasters in Germany) is a joint organization of Germany's regional public-service broadcasters. Together with ZDF, ARD is running the children's programme channel K.I.K.A., an „event“ / current affairs and documentary channel PHOENIX and together with the French TV production house ARTE France, the European cultural programme ARTE. 3sat is jointly run by ZDF, SRG, SSR idée suisse and ARD. Within the programme ARD Digital, ARD broadcasts the additional programmes EinsExtra, EinsPlus and EinsFestival.

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GERMANY



ZDF – ZWEITES DEUTSCHES FERNSEHEN

Zweites Deutsches Fernsehen (English: “ZDF German Television”), ZDF, is a public service German television broadcaster based in Mainz (Rhineland-Palatinate). It is run as an independent non-profit institution, which was founded by all federal states of Germany. ZDF is financed by television licence fees and advertising revenues. ZDF is a partner in the channels Arte and 3sat and it runs the digital channel ZDFneo (among others), all the mentioned channels schedule TV drama.

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GERMANY



3 SAT

3sat is the common full programme by the four public broadcasters ZDF and ARD from Germany, the ORF from Austria and the SRG SSR (Swiss television), completely without advertising slots.

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GERMANY



BR – BAYERISCHER RUNDFUNK

Bayerischer Rundfunk is Bavaria's public broadcasting service with two television stations (BR and BR Alpha) belonging to the ARD network of regional public broadcasters. BR has acquired a first-rate international reputation for outstanding feature films and high-quality documentaries. BR productions and co-productions receive more than 100 awards at national and international festivals over the course of a year. Support for up-and-coming young filmmakers is a particular strength at BR, and the broadcaster has paved the way for many German directors' first films and thus their careers.

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GERMANY



HR – HESSISCHER RUNDFUNK

The HR is a public broadcaster based in Frankfurt. Belonging to the ARD-consortium of public broadcasting stations, the hr contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes.

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GERMANY



KIKA – DER KINDERKANAL VON ARD UND ZDF

Childrens television channel operated jointly by ARD network and ZDF, series, feature films, magazines, documentaries, news and current affairs programs, specialties and programming days dedicated to topical issues, in-house productions, live broadcasts, numerous first broadcasts, as well as classics of children's programs produced by ARD and ZDF. Offering a large variety of high-quality, target-group-oriented programs free from commercials, for children aged three to thirteen. Der Kinderkanal von ARD und ZDF.

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GERMANY



MDR - MITTELDEUTSCHER RUNDFUNK

The MDR is a public, terrestrial broadcaster based in Leipzig. Belonging to the ARD-consortium of public broadcasting stations, the rbb contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes for Saxony, Saxony-Anhalt and Thuringa.

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GERMANY



NDR – NORDDEUTSCHER RUNDFUNK

NDR Fernsehen – Information and Entertainment from the North. Regional full programme with a clear Northern German emphasis. Belonging to the ARD-consortium of public broadcasting stations.

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GERMANY

PROSIEBENSAT1 TV DEUTSCHLAND

ProSiebenSat.1 combines commercial TV stations SAT.1, ProSieben, kabel eins, sixx, SAT.1 Gold, and ProSieben MAXX. The broadcasting family offers strong broadcast brands with recognition value, clear profiles, and a colorful mix of popular, familiar and big, innovative. ProSiebenSat.1 TV Deutschland is part of the ProSiebenSat.1 Group, one of Europe's leading media groups.

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GERMANY



RBB - RUNDFUNK BERLIN-BRANDENBURG

The rbb is a public, terrestrial broadcaster based in Berlin and Potsdam. Belonging to the ARD-consortium of public broadcasting stations, the rbb contributes to the output of the national tv-channel "Das Erste" and also produces regional television programmes. The rbb Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

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GERMANY

RTL TELEVISION GMBH

RTL Television is Germany's leading private broadcaster among viewers (14 to 59 years) and the general public alike. RTL features a strong line-up with highlights in all genres including big entertainment, factual entertainment formats, popular US series, the most popular German daily soap "Gute Zeiten, schlechte Zeiten" (Good Times, Bad Times), fiction formats like the action series "Alarm für Cobra 11" or "Deutschland 83", comedy shows, news programmes like "RTL Aktuell" and live sporting events such as the Formula 1. RTL Television is part of the The Media Group RTL Germany (RTL, RTL 2, VOX, SuperRTL, n-tv, RTL Nitro), one of the leading media companies in Germany.

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GERMANY



SAARLÄNDISCHER RUNDFUNK

Saarländischer Rundfunk (Saarland Broadcasting - SR) is a public radio and television broadcaster for the German Bundesland (State) of Saarland, with its headquarters in the Broadcasting House Halberg in Saarbrücken. SR is a member of the ARD consortium.

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GERMANY



SKY DEUTSCHLAND FERNSEHEN GMBH & CO. KG

Sky Deutschland is the leading provider of Pay-Tv in Germany and Austria. The company offers subscription-based TV as well as on-demand services to private and business customers. With over 70 exclusive TV channels the SKY platform offers live sport, feature films, series, children programs and documentaries. Sky Deutschland has recently engaged in production and co-production of fiction and series.

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GERMANY



SWR SÜDWESTDEUTSCHER RUNDFUNK FUNKHAUS STUTTGART

SWR is a regional public broadcasting station with two television channels serving the southwest of Germany. The corporation has main offices in three cities: Stuttgart, Baden-Baden and Mainz. It is the second largest broadcasting organization within the ARD network of public broadcasters. Its programming provides information, education, guidance and entertainment within a special focus on culture.

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GERMANY



VOX TELEVISION

VOX belongs to the RTL-network and doesn't broadcast its own motion picture productions. RTL is also the purchaser for VOX motion picture.

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GERMANY



WDR – WESTDEUTSCHER RUNDFUNK

The WDR is a public broadcaster based in Cologne. Belonging to the ARD-consortium of public broadcasting stations, the WDR contributes to the output of the national tv-channel “Das Erste” and also produces regional television programmes. The WDR Drama Department commissions tv-movies as well as series, serials, debuts and feature films.

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GERMANY

GREECE

The main players in the broadcasting sector in Greece are the following: the Teletypos Group with two channels had an audience share of more than 17% in 2014. It's mainchannel Mega TV shares top place with Antenna 1 regarding daily audience share; the Antenna Group with the channel Antenna 1 more than 17% of the daily audience share; the channels of the public service broadcaster ERT with a combined share of 7.2%.

The Greek public broadcaster has witnessed several major changes over the past years. In June 2013 the services (three TV channels, several radio stations and the Internet service) of ERT were closed by the government. The European Broadcasting Union (EBU) provided support to allow the service to continue broadcasting on an interim basis. In July 2013, a New Greek Radio, Internet and Television Act was passed by the Greek Parliament to establish a new public service broadcaster. The new company called NERIT launched in May 2014. Finally, in June 2015 the former public broadcaster ERT was re-opened and the channels ERT1, ERT2 and ERT 3 were re-launched. Alpha TV is the third most popular channel with an almost 14% share in 2014. This is followed by Star TV (News Television S.A.) with and Skai TV.

On-demand audiovisual services established in Greece include a range of catch-up TV services of which those of the main broadcasters are most significant. The main distribution companies Hol, OTE, ON Telecoms all have their own VOD services. Netflix also became available in Greece following the global launch of the service in January 2016.

The main distribution platform is the free DTT platform serving more than 50% of homes.

There are no cable TV services in Greece.

The legislation relevant to the Greek audiovisual market includes the "Presidential Decree on Audiovisual Media Services" and the "Legal Regime of Private TV and Radio Broadcasting Law" (Law 2328/1995). As regards the public service broadcaster, the "New Hellenic Radio, Internet and Television" Act 4173/2013 established NERIT, while the Act 4324/2015 "Regulations on the public broadcaster, Greek Radio Television SA and amendment of article 48 of L 2190/1920 and other provisions", re-established the ERT.

In addition, a new law was passed in 2015, the Act 4339/2015 "Licensing of content providers of free-to-air digital terrestrial television and other provisions", which changed the provisions for the licensing of DTT TV services.

The broadcasting system and audiovisual services in Greece are regulated by the National Council of Radio and Television.

HELLENIC PARLIAMENT TV

The Television Station of the Hellenic Parliament is operating since 1999 as an autonomous television network, a non-profit mass medium. It broadcasts a daily parliamentary newscast that gives briefings on the day-to-day business of parliament, as well as information on democratic institutions and the parliamentary history of Greece. Moreover, in the framework of promoting cultural subjects, the Television of the Parliament broadcasts classical movies, historical and scientific documentaries, opera, theatrical plays and ballets, while emphasis is given to folklore subjects designating the social history of the different areas of our country.

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ALPHA SATELLITE TELEVISION SA

Alpha is a family-oriented station. It features popular fiction, light entertainment, live programming as well as news and informative shows. It reaches its audience through various consumer touch points and platforms: free-to-air, online and mobile, engaging its viewers in multiple ways. It also has its own studios for in-house productions and its programs are transmitted to Australia (UBI), the US (Dish).

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GREECE



MEGA CHANNEL

Mega Channel was the first TV station to be established in Greece (1989) on the basis of the legal framework that permitted the formation of private television stations. During its years of operation, has attained a high position in the public's preference. Mega's programming consists mainly of Greek programs such as comedies, dramas, news, current affairs and entertainment shows.

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SKAI TV

Skai TV is a television network part of the Skai Group. It was relaunched in its present form on 1 April 2006 in Athens metropolitan area, and gradually spread its coverage nationwide. Besides analogue terrestrial transmission, it is available on the subscription-based encrypted services of Nova and OTE TV. Skai TV is also a member of Digea, a consortium of private television networks introducing digital terrestrial transmission in Greece. Skai TV airs a diverse programming mix with a focus on entertainment and information.

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GREECE



MAD TV

Mad TV is one of the most recognizable music channels in Greece part of the largest organization of Mad Music & Media Services which manages and operates on a daily basis four television channels (Mad Greekz / Nova, Mad Cyprus / Cyprus, Mad Al / Albania, Mad lits / OTE TV), one radio station (106.2 Mad Radio) and one internet site.

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GREECE



NOVA TV

Nova TV is the first digital, satellite TV platform in Greece activated in the field of pay TV. Part of Forthnet Group which is the largest privately owned group that provides broadband and pay TV services in Greece. Forthnet Group is constantly devoted to the development of pioneering proposals for the provision of integrated and inexpensive communication and entertainment services to the Greek family.

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GREECE



MTV GREECE

MTV Greece, began September 1, 2008 and is the Greek version of MTV. It broadcasts mainly foreign and Greek pop, rock, dance and hip hop music, shows of MTV international as: Pimp My Ride, Disaster Date, Made, Room Raiders, Death Valley and greek productions as: Movies & Stars, HitList Hellas, Everyday Girls, MTV News, Your Noise Daily, City Life, Game On and Live @ Your Place.

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GREECE

ANT1

The business and communicative flagship of the Antenna Group, ANT1 channel was founded in 1989 and since then has been maintained a leading position. It is the first private television station broadcast the voice and image of Greece in USA, Australia and Europe. Programming consists of comedies, dramas, news, current affairs programs, game shows and entertainment shows. Over the years the ANT1 evolved into an innovative channel reflect the views of contemporary Greek and offers high quality information and entertainment aspect, immediacy and consistency.

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STAR CHANNEL

Star Channel was founded in 1993 and has more than 100 privately owned broadcasting centers covering 95% of the population. It has gone in the minds of viewers as “the TV station with the best foreign films and series”, a fact which has been repeatedly awarded in various television awards. Generally, the program is aimed primarily at viewers aged 15-44 years. Its aim is to further strengthen its position in the television horizon, with equal emphasis on the information and the entertainment sector.

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ERT SA

NERIT is a public service broadcasting corporation. Financed by license fee and advertising, it has national coverage and is broadcasting in Greek. The tv channels are complementary and the programming offers news, current affairs, documentaries, art programs, drama, sports, entertainment and educational programs.

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GREECE

OTE TV

OTE TV is a satellite and IPTV Pay TV service, being a business unit of the Hellenic Telecommunications Organization (OTE), the largest telecommunications provider in the Greek market. Among a portfolio of over 80 channels, OTE TV offers 3 OTE Cinema channels: OTE Cinema 1 HD, OTE Cinema 2 and OTE Cinema 3.

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GREECE

HUNGARY

The TV landscape in Hungary is dominated by three groups: the Private broadcasting group RTI Group, based in Luxembourg, operates 15 channels, including RTL Klub, which is the 2nd most viewed channel in the market; the private broadcasting group TV 2 Media, runs the leading TV2 channel, and a portfolio of thematic channels. TV 2 was previously owned by Germany's ProSieben. Sat1; and the public service broadcaster Magyar Televízió which runs the M1, M2 and M3 channels. Other significant broadcasters include US-based AMC Networks and Sweden-based MTG.

Regarding on-demand audiovisual services, by the end of 2015, 24 pay video-on-demand services were available in Hungary. Among these pay VOD services, 7 were established in Hungary. Major players in the Hungarian VOD market include national versions of iTunes, Netflix, HBO competing with the VOD services of UPC (cable) and Magyar Telekom (IPTV).

In the distribution market in 2014, 25% of the 4.1 million households were still accessing an analogue television service, as cable networks, which serve 45% of households remained, primarily analogue. The main cable operators are UPC, Magyar Telecom and Digi Tavkolesi. All three also run satellite and/or IPTV services. Satellite serves 22% of households and is fully digitized. The main satellite pay-TV providers are UPC, Magyar Telecom and Digi Tavkolesi.

DTT serves 21% of households and offers both free channels and a pay-TV package (Mindig TV Extra). IPTV is used by 12% of households (service provided by Magyar Telekom).

The audiovisual sector is governed by the Act CLXXXV of 2010 on Media Services and Mass Media. The regulatory Authority NMHH (National Media and Infocommunications Authority) has responsibility for the regulation of the audiovisual sector.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



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HUNGARY



MTVA - MEDIA SERVICE SUPPORT AND ASSET MANAGEMENT FUND

The Media Service Support and Asset Management Fund is the umbrella organization of the Hungarian public service media. Since its foundation in 2011, MTVA has unified and streamlined all content production and asset management activities for the entire Hungarian public service media, thus creating the largest media service organization in Hungary. Whilst producing content for television, radio, online platforms and news agencies, MTVA also manages all assets on behalf of the Hungarian public service broadcaster Duna Media Service Non-Profit Ltd. MTVA also provides support with content production and acquisition.

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HUNGARY

RTL KLUB

The Hungarian RTL Television Company was founded on 8 April 1997, and the television channel RTL Klub run by the company was launched in October 1997. RTL Klub has been one of the largest and most influential participants of the Hungarian television market since 1999, and it has continuously preserved its position. In 2011 RTL Group increased its existing shareholding in M-RTL Zrt by 31% and thus the media conglomerate became the single 100% owner of the channel RTL Klub. Simultaneously the media group purchased seven cable channels: Cool, Film+, RTLII, Film+2, sorozat+, RTL+ and Music TV, which comprise the portfolio of RTL Hungary. The CEO of M-RTL Zrt has been Gabriella Vidus since 1 July 2015.

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HUNGARY

TV2 GROUP

TV2 Group owns one of the largest commercial television portfolios of Hungary, operating since 1997. The media group operates one of the leading commercial terrestrial channels of the country, TV2, reaching several million viewers on a daily basis. In 2016 the media corporation implemented the biggest portfolio extension and program investment of the past 15 years by launching various new channels. The portfolio offer different genres such us SuperTV2, the Group's premium, general interest entertainment channel. Mozi+, the movie channel. PRIME a premium entertainment channel, where popular series and blockbuster movies are aired. For gastronomy lovers Chili TV, Spiler TV is a channel for men, with Premier League and Moto GP. Izaura TV for the telenovela fans. Zenebutik, the music channel. Kiwi TV offers entertainment to the smallest viewers, while adults can laugh watching Humor+, the comedy channel. FEM3, the lifestyle channel with several own productions.

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HUNGARY

TV2 GROUP (MTM-SBS)

V2 is one of the biggest commercial free TV channels in Hungary, reaching millions of viewers day by day. Owing to the extraordinary proportion of local production TV2 is unique and cannot be missed. The premium-quality basic cable channel of the portfolio is SuperTV2, where the audience can enjoy programmes produced specifically for this channel. FEM3 fascinates: provides good advice and tells stories on top of entertaining female spectators daily. PRO4 is the male-oriented channel of TV2 Group: it offers sports content besides movies and series.

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HUNGARY

ICELAND

The Icelandic TV market is dominated by three channels, which had a combined daily audience share of 94.6% in 2012: the public channel Sjónvarpið (RÚV-TV) had in 2012 a share of 56.3%, while the two major private channels, Stöð 2 (a pay-TV channel) and Skjár 1, had respectively shares of 29.1% and 9.1%. (Audience data source: Eurodata TV Worldwide / Capacent Iceland).

The Icelandic market has thirty channels, four of which broadcast nationally: the pay-TV channels Stöð 2 and Stöð 2 Sport and the free-to-air channels Sjónvarpið (public) and Skjár 1. They can be received by more than 90% of the population. Others, such as Althingi (the parliament channel), INN, N4, Omega, Stöð 2 Extra and the pay-TV channel Stöð 2 Bio reach between 50 and 90% of the population. In October 2013 Stöð 3, a new pay channel targeting the 20-35 age group, started broadcasting. After the launch of three new channels in August 2012 (Stöð 2 Krakkar, Stöð 2 Gull, Stöð 2 Popptívi) by 365 ljósvakamiðlar ehf., a subsidiary of Dagsbrún hf, the company's total number of channels has increased to eleven (others include Stöð 2, Stöð 2 Sport, Stöð 2 Bíó, Stöð 2 Extra and their time-shifted versions). Skjár 1 is controlled by Síminn hf., the former national telecommunications operator Landssími Íslands hf, which was privatised in 2005.

Dagsbrún and Síminn, who own the main private Icelandic channels, are also the most important players on the pay-TV distribution market. Dagsbrún controls the digital terrestrial television platform and the IPTV service launched by Vodafone in 2007. Síminn operates the IPTV platform Sjonvarp Simans, which was launched in 2004.

On 15 April 2011 the Icelandic Parliament adopted a new media act, to implement the Audiovisual Media Services Directive and replace the 2000 broadcasting act, and the 1956 press act. It introduces an obligation for all media in Iceland to be registered with a new media authority, the Media Committee. In November 2012 the Minister of Education, Science and Culture appointed a Committee to propose amendments to the media law, with a focus on media coverage of elections. On February 2013 the Committee, taking into consideration some comments suggested by the OCSE in 2009, issued a report proposing several amendments regarding mostly political advertisement on opinion polls on the elections. The report and proposals were presented to the Minister of Education, Science and Culture and the Parliament, but no amendments had been approved by end 2013.



Prisoners – This TV drama series received support from the MEDIA TV Programming Scheme.



Trapped – This TV drama series received both MEDIA Development and TV Programming support

RIKISUTVARPID, RUV

Ríkisutvarpid, RUV, The Icelandic National Broadcasting Service, is an independent public service broadcaster, comprising television, radio and online services. The main objective of the National Broadcasting Service is to inform, educate and entertain. RUV's income can only be allocated for broadcasting purposes. RUV's television network reaches 99,9% of households; market share in viewing throughout 2010 was 51,7% for RUV TV. According to the Broadcasting Act the main obligation of RUV is to promote the Icelandic language and history as well as Iceland's cultural heritage.

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SIMINN – SJONVARP (SIMINN TELEVISION)

Siminn is an independent media company which divides into four different media units. The cable service distributes over 60 foreign cable channels including DR1, Discovery, BBC World News and more. The VOD service offers the largest VOD service via IPTV in Iceland. Siminn Sjonvarp is a pay TV channel financed by advertising revenues. Its main programming needs are scripted dramas and high quality entertainment content. Siminn Sjonvarp also produces it's own local programming, both scripted and entertainment.

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STÖÐ 2 (CHANNEL 2)

Stöð 2 (Channel 2) is an ad-supported subscription TV channel founded in 1986. On average 45% of Icelandic households subscribe to Stod 2. The station is a part of 365 Media, Icelands leading media company. Stod 2 offers a selection of the world's highest rated TV shows, award-winning series, latest Hollywood blockbuster features, the most popular local programming, scripted and non-scripted, as well as daily local news and news related programming. As a brand Stod 2 operates several other subscription channels including sports channels and a movie channel.

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ICELAND

IRELAND

The most important broadcasting groups in Ireland are: the public service broadcaster RTE is the most important player with 8 channels and close to 27% daily audience share in 2014; TV3 (since 2015 part of Liberty Global) with 2 channels and a 12,8% audience share; the BBC Group (one of three British broadcasters with a significant presence in the Irish TV market) whose audience market share in Ireland was more than 6% in 2014; the share of the Sky Plc. thematic channels (mainly received over satellite) in Ireland was more than 5% in 2014.

Channel 4 TV brands also target Ireland and had around 3% audience share in 2014. These are followed by the Irish language public broadcaster TG4 with 1.8% share. The shares in Ireland of the main UK channels BBC1, UTV, Channel 4, BBC2 and Sky One have dropped from 18.2% in 2009 to 11.4% in 2014 indicating a continuous fragmentation of audiences in the multi-channel homes.

UTV (owned by ITV Plc.) launched a UTV Ireland channel in 2015 – but this was acquired by Virgin Media Limited, a wholly-owned subsidiary of Liberty Global in late 2016. TV3 was re-structured to consolidate the two businesses into one with a new channel be3 replacing UTV Ireland.

The main on demand services established in Ireland are the catch-up services of the important broadcasters such as the RTE Player. The main

distributors also provide on-demand services (UPC, Sky and Eircom). There are also the local versions of Netflix iTunes, Xbox Live, and Mubi. The Irish service Volta (with Irish films and International independent feature films) provides a VOD rental service.

The level of digital TV households reached 90.9% of the 1.5 million households in 2014. Satellite is the most important distribution platform with more than 40% of homes subscribed to the services of Sky Plc. Cable television is used by almost 24% of homes. The main player is UPC (Liberty Global) in 20% of homes.

In Ireland, the main legislation for the media sector is the Broadcasting Act of 2009. With the Broadcasting Act, the Broadcasting Authority of Ireland (BAI) was established.) Since then the BAI has had a role in regulating aspects of the operation of the public service broadcasters, RTE and TG4. The BAI conducts reviews every five years of the adequacy of public funding to enable public service broadcasters to meet their public service objects. The BAI regulates broadcasting in Ireland while the Commission for Communications Regulation (ComReg) is in charge of the regulation of networks and communications markets.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



Trivia, 2010 – Production Company: Grand Pictures. Developed with the support of the MEDIA Slate Funding scheme.



RTÉ

Raidió Teilifís Éireann, (*Radio [and] Television of Ireland*; abbreviated as RTÉ) is a semi-state organization and the public service broadcaster of Ireland. It both produces programmes and broadcasts them on television, radio and the internet. RTÉ operates two free-to-air television channels, RTÉ One and RTÉ2. RTÉ One is the main channel providing a comprehensive range of home-produced Irish factual, entertainment, drama and lifestyle programming, which is complemented by selected acquired material. RTÉ2 is a mixed-genre channel appealing to a variety of audiences across the schedule. During daytime its primary focus is children and sports; in the evening it targets viewers of a young mindset with innovative drama, entertainment and key acquisitions.

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IRELAND

TG4

TG4 (Irish: TG Ceathair) is a public service broadcaster for Irish-language speakers. The channel has been on-air since October 31, 1996 in the Republic of Ireland and since April 2005 in Northern Ireland. The daily Irish language programme schedule is its core service: seven hours of programming in Irish supported by a wide range of material in other languages such as French and English.

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TV3

TV3 is Ireland's leading commercial broadcaster operating three free-to-air channels (3, 3e and b3) and a digital platform. TV3 group is now wholly owned by Virgin Media Ireland Limited. Virgin Media is part of Liberty Global, the world's largest international cable company, with operations in more than 30 countries.

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IRELAND

ITALY

The TV landscape in Italy is dominated by two groups: Public Service Broadcaster RAI manages three main terrestrial channels (Rai Uno, Rai Due and Rai Tre) and a portfolio of thematic channels. RAI accounts for over 37% of the audience market share; private broadcasting group Mediaset gathers over 32% of the audience with its three main terrestrial channels (Canale 5, Italia 1, Rete 4) and its portfolio of thematic channels.

Other significant broadcasters include Cairo Communication (La Sette), US groups 21st Century Fox, owner of the pay-TV satellite service Sky Italia, and Discovery Communications.

A distinctive characteristic of the Italian audiovisual market is the large number of terrestrial local and regional TV channels.

By the end of 2015, 51 pay video-on-demand services were available in Italy, a relatively low number considering the size of the market. Among these pay VOD services, 11 were established in Italy. Major players in the VOD Italian market include national versions of iTunes, Google Play, Wuaki TV, Netflix, Viewster, Microsoft Store and Sony PlayStation Video. National players include Telecom Italia Timvision, Mediaset Infinity and Chili TV.

In 2014, TV reception is almost fully digitized, with 95.7% of the 23.6 million households accessing digital TV. DTT is by far the first TV reception network, serving close to 69% of the households and includes pay-services delivered by Mediaset Premium. DTT is complemented by satellite (with pay-service Sky Italia from News Corp, and free service Tivù, from RAI, Mediaset and Telecom Italia) and, marginally, by IPTV (Telecom Italia). Cable TV is not available in Italy.

The audiovisual sector is governed by the Decreto legislativo 15 marzo 2010 n. 44 – Testo unico dei servizi audiovisivi e radiofonici. Public service broadcaster RAI missions are also defined through a three year service contract with the Italian Government. The converged regulatory authority AGCOM has responsibility for the regulation of the audiovisual sector.



1992



The Young Pope



RAI

Rai 1 is the flagship television station of RAI, Italy's national public service broadcaster, and the most watched television channel in the country. Rai2 is one of the three main television channels broadcast by Italian public television company RAI alongside with Rai 1 and Rai 3. Rai 3 is the third channel of Rai and it offers many public service programmes. Rai Movie, launched in 2003 as RaiSat Cinema World and re-badged in 2006 as RaiSat Cinema, on May 18, 2010 the channel has been re-launched as Rai Movie. It broadcasts mostly Italian films, interview, backstage and documentaries. Rai 4 is an entertainment television channel, programming includes films, TV series and cartoons. Rai 5 has replaced Rai Extra. It broadcasts programs about art, fashion, dance, opera, theatre, cuisine, travel, documentary films and TV Drama..

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ITALY

MEDIASET

Canale 5 is a classic generalist channel, aimed at the mass family audience. Italia 1 is the Mediaset Group's youngest channel, paying particular attention to the tastes of its audience. Retequattro: offers programmes of traditional shows, much appreciated by women viewers, with programmes aimed at a male audience. Mediaset Italia 2 is a channel dedicated to younger male viewers: TV series, sitcoms, cult cartoons and sports and music programmes. Mediaset Extra is a new thematic channel that offers a selection of archive and current entertainment programmes from the Mediaset network. La5 is the free digital terrestrial channel that offers scheduling dedicated to a modern feminine audience. Iris is a thematic channel dedicated to quality films, although it also broadcast programmes about cinema news, film stars and the most important film festivals

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SKY ITALIA SRL

Sky Italia S.r.l. is an Italian digital satellite television platform owned by News Corporation launched on 1st August 2003, when the former platforms Tele+ (Canal+) and Stream TV (News Corporation and Telecom Italia) merged together. It is similar in many ways to BSkyB's Sky Digital in the United Kingdom and Ireland, and like that network it is a major sports broadcaster

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ITALY



LA7 S.R.L.

La7 and La7d are private television channels and they are owned by Cairo Communications. Their programmes are typically oriented to information, films, entertainment and sport.

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ITALY



LA EFFE TV

La EffeTv is a media company of Gruppo Feltrinelli. The show schedule is characterized by information, culture and entertainment, among which Cinema and TV Series.

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ITALY

LATVIA

The last couple of years in the television market in Latvia were marked by substantial investment by the Latvian public broadcaster, LTV, into original content production, which led to its market share growing to 13%. LTV is now among top three channels in the country with TV3 (12.1%), a private channel broadcasting in the Latvian language, and PBK (9.8%), a private channel broadcasting in the Russian language. (Audience data: TNS Latvia)

By the beginning of 2016, there were 50 on-demand services available in Latvia, including 24 pay TVOD and SVOD services. The main players were the national versions of iTunes and Netflix and the Russian version of Viewster also has a limited offer of national VOD and catch-up TV services.

By the end of 2014, 79.7% of TV households accessed a digital television service. Cable served 36% of households, but was not fully digitized: 17.1% of households still subscribed to analogue cable. The cable sector remains fragmented; the main cable-operators are Balticom, Baltkom TV, Dautkom, Elektronis & K SIA, Izzi, Livas Telecommunications and Ostkom. DTT served 21.4% of the population, offering a combination of free channels and the pay-package Lattelecom (Latvian State/TeliaSonera). IPTV served 19.2% of households with three operators: Lattelecom (Latvian State/TeliaSonera), Livas and Baltkom TV. Satellite was the primary access for television for the remaining 14.5% of households, including a pay-package operated by Viasat (Modern Times Group).

The main legislative act that regulates broadcasting in Latvia is the “Electronic Mass Media Law” (2010).

The regulator of the audiovisual sector is the National Electronic Media Council, which as the shareholder of the Public Service Broadcasters Latvijas Televizija and Latvijas Radio, supervises the public service sector. (Source: MAVISE Database)

SOURCE: Creative Europe Desk Latvia; MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



Mellow Mud, dir. Renars Vimba, Tasse Film, 2016

LATVIAN TELEVISION (LTV)

Latvian Television (LTV1 and LTV7) is a public service broadcaster, established in 1954, a member of the EBU since 1993. 70% of its funding is directly allocated by the government, while the rest must be earned by commercial activity. LTV1 is a generalist public channel, with mainly in-house productions, content commissioned from the independent sector in Latvia, as well as acquired content of European origin. Original drama series production has started to develop in 2014 and remains as one of the priorities. LTV7 aims to provide innovative content to younger audiences, focusing on factual entertainment, documentaries and sports.

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LITHUANIA

The three main broadcasting groups in Lithuania are:

- MG Baltic, operating 6 channels, including the 2nd ranking TV channel in terms of audience market share, LNK;
- The Swedish Modern-Times Group, operating 10 channels, including the leading TV channel, TV3 Lithuania;
- The Baltic Media Alliance, based in Latvia, is operating 2 channels, including Ren TV;
- The Public Service Broadcaster Lithuanian National Radio and Television (LNRT) is operating a total of 4 TV channels, including the 3rd ranking TV channel in audience, LRT.
- Other significant broadcasters include Russia-based RTR.

By the beginning of 2016, there were 40 on-demand services available in Lithuania, including 18 pay TVOD and SVOD services. The main players were the national versions of iTunes and Netflix and the Russian version of Viewster has a limited offer of national catch-up TV services.

By the end of 2014, 70.8% of TV households accessed a digital television service. DTT served 40% of the population, offering a combination of free channels and two pay-packages: Teo LT (TeliaSonera) and Balticum TV. Cable served 32.7% of households, but was not fully digitized: 22.2% of households still subscribed to analogue cable. The main cable-operators are Balticum TV, Cgates (Starman), Init and Viginta. IPTV served 11.1% of the population, operated mainly by Teo LT (TeliaSonera), Penkiu Kontinentu and Transteleservis. Satellite was the primary access for television for the remaining 9.3% of households, including a pay-package operated by Viasat (Modern Times Group).

The main legislative acts that regulate broadcasting are the “Law on provision of information to the public” of 2 July 1996 and the “Law on Electronic Communications” of 15 April 2004. The regulator of the audiovisual sector is the Radio and Television Commission of Lithuania (RTCL).

The public service broadcaster LNRT is specifically governed by the “Law on the national radio and television” of 8 October 1996.

The Lithuanian Radio and Television Council oversees the operations of LNRT.



LRT

Lithuanian National Radio and Television (LRT) is a non-profit public institution that has been providing regular radio services since 1926 and television broadcasts - since 1957. LRT operates three national television channels (LRT Televizija, LRT Kultūra, LRT Lituanica) and three radio channels (LRT Radijas, LRT Klasika, LRT Opus), also news website www.lrt.lt. LRT is funded directly from the State budget and has no advertising since the 1st January, 2015. Its activities are supervised by the LRT Council.

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LITHUANIA

UAB „TELE-3“

TV3, TV6 and TV8 channels are a part of international entertainment group – MTG (Modern Times Group). TV3 television – Nr.1 in Lithuania for 11 years! TV3 brings the best movies, TV series and local programs. Channel slogan – It is good to be together, so everyone is invited to turn on TV and enjoy the magical world of entertainment. If you want a bit more “edgy” program with a taste of best sports – UEFA, Formula 1 and basketball – turn on TV6. Mature women are invited to relax while watching love movies and TV series while watching TV8 channel.

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LAISVAS IR NEPRIKLAUSOMAS KANALAS

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LITHUANIA



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LITHUANIA

LIETUVOS RYTO TELEVIZIJA (LIETUVOS RYTAS TV)

"Lietuvos ryto" TV was launched at October 2008 as a part of "Lietuvos rytas" Media Group. It's commercial Free-to-Air channel, Internet simulcast is available as well. TV channel is oriented to general audience. There are daily News every hour starting midday until 10:30 PM, local produced shows, journalistic investigations, game-shows, movies, documentaries, TV series - all interesting and attractive genres. We are opened for a new ideas!

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LITHUANIA



LUXEMBOURG

Luxembourg has long had an official policy of welcoming pan-European companies. It is home, for example, to SES Global – the world's leading satellite operator thanks to its Astra system, the RTL Group, Europe's leading audiovisual group, and M7, the satellite platform that distributes channel packages. In the field of on-demand audiovisual services, Luxembourg acts as a host country for the provision of cross-border services and is home to the iTunes Store (Apple) and other services. Microsoft's Xbox Live is also based in Luxembourg but is considered a distribution platform by the authorities and not an on-demand audiovisual service.

The law on the creation of the public service body *Autorité luxembourgeoise indépendante de l'audiovisuel* (Luxembourg Independent Audiovisual Authority – ALIA) was formally adopted on 27 August 2013 and entered into force on 1 December 2013. It reforms Luxembourg's regulatory bodies by replacing most of the former authorities by a single competent authority.

The audience share of RTL Lëtzebuerg in 2012 was 35.4% between 7 and 8 pm but continued to decline during the daytime. According to the 2012 Plurimedia Survey conducted by TNS Ilres, RTL Tele Lëtzebuerg reached 114 800 viewers (or 26.1% of the population), while the channel Den zten RTL reached 9000 (2%). CLT-UFA operates Luxembourg's digital terrestrial platform, which provides access to 13 channels, eleven of which are controlled by the RTL Group. The two independent channels are Luxe TV and Air TV, a new general entertainment channel launched in February 2011.

Cable, which supplies nearly two-thirds of households, dominates in Luxembourg. Most of the fifty or so operators identified in the country are local authorities or nonprofit associations. In 2013, only three companies were still operating in this sector. Eltrona dominates the market with the Imagin package, which had 115 000 subscribers at the end of 2010. Its main competitors are Sogel and Numericable, which was taken over in July 2011 by the Luxembourg based companies Deficom (60%) and Apax (40%). The telecommunications operator *Entreprise des P&T*, renamed Post Telecom, is a significant competitor in the pay-TV market, with its package, PostTV, which had signed up 22 000 subscribers by the end of 2011. The Belgian operator Belgacom has also gained a foothold on the market by setting up a subsidiary, Tango SA.



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LUXEMBOURG

MALTA

The historical development of broadcasting in Malta has led to a level of political ownership of the media. The following are the main players in the market.

According to the audience survey carried out by the broadcasting regulator in October 2014, the public broadcaster TVM (with 2 channels) continued to dominate the market with a 39.3% share of the audience reach. The Nationalist Party owns Net TV with a 9.3% share of the audience reach. The Malta Labour Party owns One TV (formerly Super One TV) with a 17.3% share of the audience reach.

Foreign channels play an important role in the Maltese broadcasting landscape, in particular Italian channels which had a combined share of the audience reach of 16.1% in October 2014. This makes the Italian Mediaset the third most important broadcaster in the country with a market share of 10.5% followed by public broadcaster RAI in 5th place with 5.6%.

Malta is also becoming a base for channels targeting other countries. In 2015 the Maltese Broadcasting Authority had satellite licences for 23 channels targeting other European, African and middle-eastern countries.

There are seven on-demand audiovisual services established in Malta including the catch-up TV services of the main broadcasters. The main IPTV and cable operators (GO and Melita) also offer on-demand services of their own.

According to data from IHS, cable television is the most important distribution platform in the country, delivering TV to more than 52% of homes. There is just one main player - Melita Cable. DTT is the second most important platform and run by GO plc, with a free to air platform carrying seven free channels, and a pay-DTT platform with 58 channels. The switch-off was completed in 2011. IPTV services are well developed and served 8.2% of homes at the end of 2014. IPTV is also provided by GO plc. Satellite does not play any significant role in the market.

The legal framework for broadcasting in Malta is the Broadcasting Act (last amended by Act VII of 2015), while Electronic Communications Networks and Services (General) Regulations (2011) covers the regulation of networks and frequencies. The Broadcasting Authority monitors and regulates all Radio and Television broadcasters in Malta



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MALTA

NETHERLANDS

The three main broadcasting groups are:

- Public service broadcaster NPO, operating 9 channels, with a total audience share of 33.2% in 2014, including the leading TV channel NPO1.
- Luxembourg based RTL Group, operating 11 TV channels with a total audience share over 23.9% in 2014, including the 2nd ranking TV channel in audience, RTL4.
- Finland based Sanoma, operating 13 channels with a total audience share of 13.5%, including the 3rd ranking TV channel in audience, SBS6.
- Other significant broadcasters include those of US origin: Viacom and Discovery Communications.

By the beginning of 2016, there were 121 on-demand services available in the Netherlands, including 23 pay TVOD or SVOD services. The main players were the national versions of iTunes, Netflix, HBO, Microsoft Store, Sony Entertainment Network, RTL Videoland and the VOD service of cable-operator Ziggo.

By the end of 2014, 86.1% of TV households accessed a digital television service. Cable served 62.2% of households, but was not fully digitized: 15.1% of households still subscribed to analogue cable. The cable sector remains relatively fragmented; however the merger between Ziggo and UPC Nederland (Liberty Global) represented a major consolidation in the market. The other two important players are CAIW Diensten and Delta. IPTV served 23.3% of households, operated by KPN, M7 Group, Telez Nederland, Vodafone. Satellite served 9.1% of households, including a pay-package operated by Luxembourg based M7. DTT served 6.5% of the population, offering a combination of free channels and the pay-package Digitenne (operated by KPN).

The main legislative act that regulates broadcasting is the "Act No. 552 of 10 December 2009 amending the Media Act 2008 and the Tobacco Act for the implementation of the Audiovisual Media Services Directive".

The regulator of the audiovisual sector is the Commissariaat voor de Media.



Remi, Nobody's Boy produced by Lemming Film in coproduction with the VPRO and received MEDIA Development support. © Sal Kroonenberg



AVROTROS

Since the first of January 2014 AVRO merged with broadcaster TROS, now they operate under the name AVROTROS.

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NETHERLANDS



BNN-VARA

Since the first of January 2014 BNN merged with broadcaster VARA, now they operate under the name BNN-VARA. Both parties keep their own name and target different audiences. BNN targets teenage and young adult audiences. It produces entertainment and informative television programs, radio programs, and feature films.

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KRO-NCRV

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NETHERLANDS



EO

EO is financed by the Dutch government. It transmits on Nederland 1, 2 and 3 which are national channels that transmit by cable and terrestrial network.

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NETHERLANDS



HUMAN

The Humanistische Omroep (HUMAN) is one of the smaller public broadcasting organizations in the Netherlands. It is a public service association. HUMAN produces programmes for Dutch television, makes radio talkshows and interactive websites.

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NETHERLANDS



OMROEP MAX

Omroep MAX is a station broadcast in The Netherlands. MAX's programming focuses on people aged 50 years and older. MAX transmits on Nederland 1 and Nederland 2.

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NETHERLANDS



NTR

NTR is the independent Dutch public service broadcaster specialising in information, education and culture. NTR's themes are based on the statutory duties of the three public service broadcasters which in 2010 merged into NTR: NPS, Teleac and RVU.

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NETHERLANDS



VPRO

VPRO is one in the group of the 9 biggest broadcasting associations in the Netherlands. It is financed by license fees and advertising. There are 3 public channels in the Netherlands that transmit by free cable, free satellite, free terrestrial and free digital television. VPRO can be found on all 3 channels.

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NETHERLANDS

NORWAY

The main players in the broadcasting sector in Norway are the following:

- The Public Service Broadcaster Norsk rikskringkasting (NRK) has 15 national channels (including 4 generalist, 1 children, 1 minority and several HD versions) and 17 regional windows. Services also include those for visually and hearing impaired audiences and the leading channel in terms of audience share, NRK;
- The Danish private broadcasting group Egmont Fonden, which owns the commercial public service broadcaster TV 2 Gruppen AS, with 29 channels (including generalist, entertainment, HD, lifestyle and sport channels), including the second most popular channel TV 2;
- US based Discovery Communications Inc. has four channels established in the country (including 2 thematic and HD channels each) and a further ten targeting the country from abroad;
- Other important players are the Swedish Modern Times Group and Walt Disney with their thematic channels.

There are at least 83 on demand services established in Norway including the catch-up TV services of the main broadcasters NRK and TV 2. The main distribution companies Altibox, Get and Riks TV also offer on demand services of their own. Netflix became available in Norway alongside the launch of the service in Denmark, Finland and Sweden in October 2012.

Pay-TV has a very high penetration rate in the Norwegian market with the Norwegian group Telenor being present in every sector.

The main legal basis for broadcasting in Norway is the Norwegian Broadcasting Act from 1992.

The Norwegian Media Authority provides licenses and supervises television- and radio channels for compliance with the broadcasting legislation. This includes overseeing the responsibilities of the national public service broadcaster NRK and commercial public service broadcaster TV 2.



Occupied (Yellow Bird Norway AS) has received funding from the TV-programming scheme of the MEDIA programme. (Photo: Aksel Jermstad)



NRK NORSK RIKSKRINGKASTING (THE NORWEGIAN BROADCASTING CORPORATION)

Norsk Rikskringkasting (The Norwegian Broadcasting Corporation) is the Norwegian government-owned broadcasting company. It is non-commercial and based on public service principles. NRK is the largest media organisation in Norway. It is a founding member of the European Broadcasting Union.

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NORWAY



TV2 NORWAY

TV 2 is the largest commercial television station in Norway and the second largest TV station in Norway. TV 2 started to broadcast in 1992, based on a governmental license to broadcast national commercial terrestrial television.

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NORWAY



MTG TV NORWAY

MTG TV, the former TV3 Norway is part of Modern Times Group, the channel also represents, Viasat 4 (viasat4.no), TV6 (tv6norge.no) and MTV (mtv.no) and Viasat in Norway.

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NORWAY



TVNORGE

TVNorge is Norway's second largest commercial channel and went on the air in 1988 as the first advertising supported channel in Norway. TVNorge is part of Discovery Networks Norway that also includes TV channels FEM, VOX, MAX, TLC and Discovery.

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NORWAY

POLAND

The three main broadcasting groups in Poland are:

- Public service broadcaster TVP, operating 11 channels, including the leading TV channel in terms of market share, TVP1;
- US based Scripps Networks, operating 13 TV channels, including the 3rd ranking TV channel in terms of audience, TVN;
- The pay-TV provider and telecom operator Polsat, operating 23 channels, including the 2nd most popular TV channel in terms of audience, Polsat.

By the beginning of 2016, there were 149 on-demand services available in Poland, including 48 pay TVOD or SVOD services. The main players were the national versions of iTunes, Netflix, HBO, the VOD services of satellite platforms NC+ and Cyfrowy Polsat, and the VOD services of cable or IPTV distributors Multimedia Polska, UPC, Netia and Orange.

By the end of 2014, 82.6% of TV households accessed a digital television service. Satellite was the primary access for television for 48.2% of households, including two major pay-packages operated by Polsat and NC+ (Scripps Networks). Cable served

31.2% of households, but was not fully digitised: 13.9% of households still subscribed to analogue cable. The cable sector remains fragmented; the main cable-operators are Multimedia Polska, UPC Polska (Liberty Global), Vectra and Toya. DTT served 14.7% of the population, offering a combination of free channels and the pay-package Cyfrowy Polsat. IPTV, although serving only 2.3% of households, is operated by Multimedia Polska, Netia, Orange Polska, Onet, Polkomtel and Wist.

The main legislative act that regulates broadcasting is the Broadcasting Act of December 29, 1992, last amended in 2013.

An amendment to the Act passed in January 2016 has proved controversial as it allows the government to directly appoint the heads of public service media, and changes the composition and appointment of public media supervisory boards. The regulator of the audiovisual sector is the National Broadcasting Council.

The regulator of the audiovisual sector is the National Broadcasting Council.



POLSAT

Polsat is an open TV channel that belongs to Polsat Group. It buys movies for all rights. The channel is also available in North America. Polsat airs 168 hours per week. Polsat is the 2nd national TV channel available via the terrestrial analogue network. It belongs to the Polsat group of channels which includes: Polsat Film, Polsat News, Polsat Sport, Polsat Sport Extra, Polsat Café, Polsat HD, Polsat Play and Polsat Romans. The broadcast programming of Polsat is targeted on general audience.

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POLAND



TVP

TVP is a Polish public station, operating 2 nation-wide channels (TVP1, TVP2) a number of thematic channels: TVP Info, TVP Kultura, TVP Sport, TVP History, TVP ABC, TVP Rozrywka, TVP Seriale and a satellite channel TVP Polonia. Its main activity is in broadcasting, production, worldwide distribution and acquisition.

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POLAND



NC+

nc+ is an advanced digital platform with the richest offer, established by the merger of the two market leaders: CYFRA+ and n. It has more than 140 selected channels of the highest quality, including more than 50 in HD, and gives access to more than 600 FTA channels. nc+ offers the most prestigious sport events and the latest film premieres straight from cinemas, available on its own six premium channels: CANAL+ HD, CANAL+ Film HD, CANAL+ Film2 HD, CANAL+ Family HD, CANAL+ Family2 HD and CANAL+ Sport HD. nc+ platform is also the broadcaster of wide range of thematic channels – Ale kino+, channel for movie enthusiasts, documentary Planete+, lifestyle Domo+ and Kuchnia+, MiniMini+ and teleTOON+ dedicated to children as well as nSport+, the first layer of access to the best nc+ sporting events.

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POLAND



HBO POLAND

HBO Poland is the Polish subsidiary of the Home Box Office (HBO). HBO Poland is a paid television station.

HBO programming consists primarily of theatrically released motion pictures and original television series, along with made-for-cable movies and documentaries, boxing matches and occasional stand-up comedy and concert specials. It operates several channels: HBO, HBO2, HBO Comedy.

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POLAND



TVN

TVN is the leading media group in Poland which belongs to American media company Scripps Network Interactive (SNI) - one of the leading developers of engaging lifestyle content for television, the Internet and emerging media platforms. TVN operates the following television channels: TVN, TVN24, TVN24 Biznes i Świat, TVN Style, TVN Turbo, TTV, TVN7, HGTV Home & Garden, Food Network, Travel Channel, TVN Fabuła, ITVN, ITVN Extra, Mango and NTL. TVN also provides an extensive range of online products, including one of Poland's leading video-on-demand services - Player.pl.

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POLAND

PORTUGAL

The Portuguese TV landscape is dominated by three groups: Grupo Media Capital, a subsidiary of Spain Prisa Group, manages TVI the leading TV channel and a portfolio of thematic channels (with more than 25% daily audience share for the group); the private broadcaster, SIC, and its associated thematic TV channels account for 22.3% of the audience market share; public service broadcaster RTP manages two main terrestrial channels (RTP1 and RTP2) and a portfolio of thematic channels. RTP accounts for over 19% of the audience market share,

Other significant broadcasters include US groups AMC Networks and 21st Century Fox, and NOS, a cable, satellite and IPTV operator (managing the “Sport TV” channels).

By the end of 2015, 43 pay video-on-demand services were available in Portugal. Among these pay VOD services, 9 are established in Portugal. Major players in the VOD Portuguese market include national versions of iTunes and Netflix. National players include the VOD services of network operators Portugal Telecom, Cabovisão and NOS.

In 2014, TV reception was almost fully digitized, with 98.9% of the 4 million households accessing digital TV. Two groups lead the distribution of TV: Portugal Telecom and NOS. Cable (almost fully digitized) and IPTV serve about one-third of households each. Satellite serves 17.2% of households, mostly through two competing pay satellite services operated by telecom operators Portugal Telecom and NOS who use satellite to extend the distribution of existing cable and IPTV offers. DTT serves 15.2% of households and delivers only free-to-air channels. Portugal Telecom operates all the DTT multiplexes.

The audiovisual sector is mainly governed by the “Lei n.º 27/2007, de 30 de Julho Lei da Televisão e dos Serviços Audiovisuais a Pedido” amended in 2011. Public service broadcaster Rádio e Televisão de Portugal’s missions are defined in a concession contract with the Portuguese State. The regulatory authority ERC has responsibility for the regulation of the audiovisual sector.

SOURCE: MAVISE Database – a database provided by the European Audiovisual Observatory on behalf of the DG Communication of the European Commission.



Fiction series *Vidago Palace* by production company HOP for RTP

PORTUGAL

RTP

RTP is a corporation which broadcasts Radio & TV channels of public service, under concession contract, since its foundation (1957). RTP is 100% owned by the Portuguese state, mainly supported by license fees and commercial income, mostly from advertising and sponsorship. RTP produces and broadcasts 8 different television channels and 8 different radio channels, serving a wide array of audiences in Portugal and abroad.

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PORTUGAL

S.I.C.: SOCIEDADE INDEPENDENTE DE COMUNICAÇÃO, S.A.

SIC is the first private television channel in Portugal. It started to broadcast, through FTA, on October 6, 1992, contributing to the plurality and independence of news and diversity of entertainment. In just three years, in May 1995, SIC lead the race in audience rating through its strong focus on news programs, entertainment, factual and fictional series, all spoken in Portuguese. Always in search of innovation, in 2000, SIC entered the world of cable channels and in 2007 entered the digital age with interactive and multi-platform content. SIC produces and broadcast 7 television channels for Portugal and abroad, with a main FTA channel, an international chan-

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PORTUGAL



TVI

TVI is the leading FTA TV Channel in Portugal, since 2000. In 2014, the channel registered a share of 23.5% in all day and of 26.5% in prime time, driven by its entertainment, local drama and news offers. Aside from the FTA TV channel TVI, the company, owned by Media Capital Group, also owns the Pay TV Channels TVI24, TVI Ficção, TVI International, TVI Africa and TVI Reality. TVI's group of channels led audiences in 2014 both in all day and prime time, with shares of 25.5% and 28.1%, reaching a daily average audience of 5,212 million viewers (43.7 million in prime time). TVI's portfolio also includes TVI Player, an OTT platform for all the programming of the channels.

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PORTUGAL

CANAL Q

Born on 29 March 2010 and the Q channel is a channel of humor, entertainment and information. It is a channel in constant satire and deconstruction of the information and real life narratives of our time. It questions the established idea of what is a television channel. 90% of the programs are written, produced, performed, presented and interpreted from scratch, from ideas and original formats created exclusively for the channel. So it produces more than 40 hours a week. Channel Q is available on channel 15 of the MEO and NOS platforms, also in Angola, Mozambique, France, Luxembourg, Monaco and Andorra. In 2014, Canal Q received the award for Best National Entertainment Channel by Meios & Publicidade, one of the most recognize awards in Portugal. Also won one of the highest distinctions in terms of design with the Grand Prix of Media & Advertising.

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PORTUGAL

ROMANIA

The main players in the broadcasting sector in Romania are the following: the Intact Media Group with 7 channels (generalist, news, lifestyle, entertainment) had an audience share of almost 22% in 2014. Its main channel Antena 1 is the second most popular channel; the private broadcaster Pro TV (owned by Central European Media enterprises) with 10 channels (including generalist, film, entertainment, music, lifestyle, HD, and sport channels) had a total of 20% of the daily audience share in 2014. It also owns the Romanian version of the SVOD service Voyo. Its main channel Pro TV is the most popular channel; in third place in the market is the Dogan Media Group with the Kanal D channels and a share of just over 7%; the public service broadcaster TVR has five national channels, one international channel, and 5 regional windows. The broadcaster had a total audience share of 5.5% in 2014; finally, the Prima Broadcasting group (taken over by the Antena Group Greece in 2014) had a share of 3.5%.

There are 9 on-demand audiovisual services established in Romania excluding the catchup TV services of the main broadcasters. The main distribution companies RCS/RDS, Telekom Romania and Orange also offer on demand services of their own alongside third party services such as HBO on Demand. Voyo is the SVOD service of Pro TV (part of the Central European Media Enterprises). Netflix also became available in Romania following the global launch of the service in January 2016.

There are several significant players in the television distribution market in Romania. A major player is RCS/RDS with cable and satellite services (although the company has sold most of its DigiTV satellite services in other countries such as the Czech Republic, Croatia, and the Slovak Republic). The company serves close to 35% of the TV homes.

Telekom Romania (owned by Deutsche Telekom and formerly known as Romtelecom) also offers cable, satellite and IPTV services serving an estimated 20% of Romanian households. UPC Romania (Liberty Global) provides cable and satellite services to another 15% of TV households. Other significant players in the market are Inis (IPTV) and Orange (France Télécom).

The roll-out of DTT services was very slow in Romania. In 2015 there was one multiplex operating with 11 channels. Progress has also been made in the allocation of multiplexes for regional television.

The legislative framework for the media in Romania includes the Audiovisual Law (which has a focus on the implementation of the AMS Directive, on the licencing and regulation of broadcasting, and on the role and functioning of the regulator). The Act on Electronic Communications (140/2012) covers the broader field of electronic communications networks. The Law on the organisation and functioning of the public audiovisual service regulates PSB.

The broadcasting system and audiovisual services in Romania are regulated by the National Audiovisual Council - NAC (Consiliul Național al Audiovizualului). The National Authority for Management and Regulation in Communications (ANCOM) regulates the communications markets and networks.



TVR (ROMANIAN NATIONAL TELEVISION)

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ROMANIA



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ROMANIA



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ROMANIA

SLOVAKIA

In 2015, there was once again a decline in the share of the viewing audiences of Slovak television broadcasters: the Radio and Television of Slovakia (RTVS) with its two channels (STV1 and STV2) and private broadcasters TV Markíza, DOMA, DAJTO, TV JOJ, Plus, WAU and TA3 only had a 66.6% daytime share.

In terms of audience share in Slovakia, TV Markíza again maintained its leading position in 2015.

Public RTVS is the sole broadcaster mandated to provide programmes under the law, with a mission to provide public service broadcasting. In 2015, it broadcast on STV1 (cinematographic works, domestic and foreign TV series, entertainment and sports) and STV2 (minority, specific target groups Slovak regions and national minorities)

TV Markíza was the market leader again in 2015 broadcasting Drama, entertainment and journalistic programmes.

DOMA – is a TV channel belonging to the broadcaster MARKÍZA – SLOVAKIA profiled for female audiences broadcasting mainly presented drama programmes, but also entertainment and news reports.

DAJTO – is the third TV channel belonging to the broadcaster MARKÍZA – SLOVAKIA offering films, TV series and programmes for men.

TV JOJ maintained its position in 2015 as the number two channel on the market. Drama programmes dominated its schedules.

The new children's channel RiK started broadcasting from the beginning of 2015.

Plus – a mono-thematic channel focused on drama programmes operated by JOJ – MAC TV

WAU – the 3rd channel belonging to the JOJ Group which is aimed at younger female audiences.

Senzi – the 4th channel belonging to the JOJ Group. A music channel targeted primarily at older audiences.

RiK – the 5th channel belonging to the JOJ Group - a childrens' channel in the Slovak language

Ťuki TV – the 6th channel belonging to the JOJ Group is a new Slovak channel for children. JOJ CINEMA – the 7th channel belonging to the JOJ Group broadcasts films on the basis of a Czech licence;

TA3 is a news television channel .

With regard to foreign channels, CS Film broadcasts the most Slovak full-length feature films, television films, TV series and short animated films. CS Film is also available via cable distribution systems and satellite in Slovakia; from 2005 Mondays have been wholly devoted to Slovak works.

Note: Our information was derived from statistical data from the website of the Council for Broadcasting and Retransmission (www.rvr.sk), the individual TV channels and PMT, s.r.o. (we would like to express our gratitude to Vladimír Fatík).



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SLOVAKIA



CREATV

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SLOVAKIA



MAC TV

Kanály / Channels: TV JOJ, PLUS, WAU, JOJ Cinema, Senzi, Ľuki TV, RiK

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SLOVAKIA



MARKÍZA – SLOVAKIA

Kanály / Channels: TV Markíza, TV Doma, Dajto, Senzi

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SLOVAKIA



MEGA MAX MEDIA

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SLOVAKIA



ROZHLAS A TELEVÍZIA SLOVENSKA (RTVS) / RADIO AND TELEVISION SLOVAKIA (RTVS)

Kanály / Channels: Jednotka, Dvojka

Mlynská dolina,
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SLOVAKIA



TV LUX

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SLOVAKIA

SLOVENIA

In Slovenia, there are two significant broadcasting groups: the public service broadcaster RTV Slovenia has five national channels and three regional with a combined daily audience share of more than 25% in 2014; Pro Plus TV (owned by Central European Media Enterprises - CME) owns the two main commercial channels in Slovenia, Pop TV and Kanal A, with a total of 32.2% of audience share. The company also owns the various Pop TV thematic channels and the CME on-demand service Voyo (Slovenia).

A third commercial channel TV3 (operated by the Modern Times Group) left the market in 2012 claiming an unfair domination of the CME Group in the advertising market. In 2013, the Agency for Protection of Competition (AVK) found that the company had abused its dominant position in the television advertising market.

The national on demand services in Slovenia include the catch-up services of the main broadcasters such as the public broadcaster RTV Slovenia. The Slovenian Voyo is the SVOD service of Pro Plus TV. (Voyo is also available in Bulgaria, the Czech Republic, the Slovak Republic and Romania, while in Croatia the service is known as Oyo). Netflix became available in Slovenia following the global launch of the service in January 2016.

Slovenia is a strong IPTV market (29.8% of households) with the service coming a strong second behind cable (33% of households), while free DTT

is relied on as a TV reception platform by 27.9% of homes (according to IHS data). There are several cable operators with the most important being Telemach. There are also several operators providing IPTV services and the most significant of these are Telekom Slovenia and T2. Just one satellite package is available — Total TV — which has subscribers in less than 3% of homes.

The main legislative acts that regulate broadcasting in Slovenia include the Media Act (last amended in 2012) and the Act on Audiovisual Media Services (2011). In addition, the Electronic Communications Act, dealing with electronic communications and spectrum management and the Digital Broadcasting Act, related to the licensing of the digital terrestrial broadcasting platforms are complementing the broadcasting regulation framework in Slovenia. The regulation of the media (and the communications sector) is carried out by the converged regulator, the Agency for Communication Networks and Services of the Republic of Slovenia — AKOS (formerly APEK). A specific law, the Radio and Television Corporation of Slovenia Act (ZRTVS-1) (last amended January 2014) relates to the establishment and the governance of public service media.

PRO PLUS

The leading media company in Slovenia, PRO PLUS constantly generates new trends through the two Free TV channels with the greatest audience shares in Slovenia - POP TV and Kanal A, as well as through its Cable TV channels - BRIO, KINO and OTO. The company has a significant on-line presence through 24ur.com, Slovenia's most visited website, 7 specialised web portals and the first video on-demand internet service in Slovenia, VOYO.

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SLOVENIA

RTV SLOVENIA

RTV Slovenija is a Public Institution and non-profit organisation. It renders public service in the field of radio and television activities in accordance to the RTV Slovenija Act. It produces two national TV programmes (TV SLO Channel 1 and TV SLO Channel 2), two regional TV programmes (TV Koper - Capodistria and TV Maribor), TV programmes for Italian and Hungarian National Communities, three national radio programmes, regional radio programmes and the radio programme for foreign public. The Editorial Department for Acquired Drama Programmes is responsible for acquiring and programming of foreign fiction programmes. RTV Slovenia is devoted to quality programmes of all genres from all over the world. It has five weekly slots for feature films and six for TV series, while two slots are especially dedicated to European productions.

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SLOVENIA



SPAIN

The three main broadcasting groups in Spain are: Mediaset España, controlled by Italy-based Mediaset S.p.a, operating 12 TV channels, with a total audience share over 30% in 2014, including the market leader Telecinco, and Cuatro; the Public Service Broadcaster RTVE, operating 6 TV channels with a total audience share of almost 17% in 2014, including the 3rd ranking TV channel in terms of audience, La 1; Atresmedia, operating 13 TV channels with a total audience share almost 20% in 2014, including Antena 3, the 2nd ranking TV channel in terms of audience, and La Sexta. Other significant broadcasters include the public regional channels, such as TV3, Canal Sur Television, TVG, Telemadrid and ETB.

By the beginning of 2016, there were 180 on-demand services available in Spain, including 101 pay TVOD or SVOD services. The main players were the national versions of iTunes, Netflix, Wuaki or Viewster also as the VOD services of the main network operators (Moviestar VideoClub, Ono TV Videoclub, Orange Videoclub) and Atresmedia' Nubeox.

By the end of 2014, 99.1% of TV households accessed a digital television service.

Spain is one of the countries where Digital Terrestrial Television is the most used: by end-2014, 70.3% of households were served by DTT, proposing only free channels since the closing of Gol TV in 2015. Satellite was the primary access for television for 11.8% of households, including a pay-package operated by DTS Distribuidora de Televisión Digital "Movistar+" (Telefonica). IPTV served 10.9% of households, with services operated by Orange España (France Télécom) and Telefonica. Cable, almost fully digitised, served the remaining 6.6% of households. The main cable-operator is ONO (Vodafone).

The main legislative act that regulates broadcasting in is the "Act 6/2012 of 1 August 2012, amending General Act 7/2010 on Audiovisual Communication of 31 March 2010. The Public Service Broadcaster RTVE is governed by the "Act 17/2006 on National Public Radio and TV" of 5 June 2006.

The national regulator for the audiovisual sector is the "Comisión Nacional de los Mercados y la Competencia".



ANTENA 3

Antena 3 is a private Spanish terrestrial channel. Its programming is generalist. When it was launched, Antena 3 was the first national private channel in Spain. It is controlled by Planeta de Agostini and RTL Group.

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SPAIN



ARAGON TELEVISION

Aragon Television is the autonomous regional channel in Aragon.

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SPAIN



CANAL EXTREMADURA TELEVISION

Canal is an autonomous public channel of Extremadura. It is broadcast in Spanish with regional coverage and free access.

Sociedad Pública de Televisión Extremeña T: 0034924382000
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SPAIN



CANAL SUR

Canal Sur is the main regional autonomous public channel of Andalusia.

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SPAIN



CASTILLA LA MANCHA

CMT is the first public autonomous channel in Castilla-La Mancha.

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SPAIN

EITB – EUSKAL IRRATI ETA TELEBISTA

Regional public broadcaster founded in 1982. Programs 10% fiction. Financed by advertising and state subsidies. The network is divided into four channels, ETB 1, ETB 2, ETB 3, and ETB 4.

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SPAIN



LA 2 - TVE

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SPAIN

LA SEXTA – (TELEFILM)

La Sexta is a Spanish private terrestrial generalist channel. When it was launched in 2006, la Sexta became the sixth Spanish national terrestrial channel. La Sexta is controlled by the GAMP (which includes Mediapro) and the mexican group Televisa.

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SPAIN



TELECINCO – GESTEVISION

Telecinco is a Spanish commercial television channel operated by Gestevisión Telecinco. Launched in 1990 as Tele 5, it was the fifth of the national terrestrial television channels. In 1997, Tele 5 was rebranded as Telecinco, dropping the flower logo seen in other Mediaset channel logos. Telecinco is a general channel catering for all audiences. It shows popular films, series and sport.

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SPAIN

TELEVISIÓ DE CATALUNYA, SA

Televisió de Catalunya is an autonomous public channel of Catalonia. It is broadcast in Catalonia, with free access, in Catalan. Televisió de Catalunya deals with six different channels: TV3, 33, 3/24, Esports 3, Super 3 and TV3CAT.

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SPAIN



TELEVISIÓ DE CATALUNYA

Televisió de Catalunya is an autonomous public channel of Catalonia. It is broadcast in Catalonia, with free access, in Catalan. Televisió de Catalunya deals with six different channels: TV3, 33, 3/24, Esports 3, Super 3 and TV3CAT.


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TVE – TELEVISIÓN ESPAÑOLA

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SPAIN

SWEDEN

The three main players in the broadcasting sector in Sweden are the following:

- The Public Service Broadcaster Sveriges Television (SVT) has 6 national channels (including two generalist, one children, two HD simulcast channels and the service SVT24) and one international (e.g. SVT World), and 22 regional windows. The market leader in terms of audience share is the channel SVT1;
- Private broadcasting group Albert Bonnier with 42 channels (including generalist, children, documentary, entertainment, film, HD, lifestyle and sport channels), including the second most popular channel TV4;
- The Modern Times Group has 16 channels established in the country (including several thematic and HD channels) and a further seven licensed in the United Kingdom which target the Swedish market.

There are at least 141 on demand services established in Sweden including the catch-up TV services of the main broadcasters SVT, TV4 and Sjuan. The main distribution companies TeliaSonera, Teracom and Com Hem also offer on demand services of their own. Sweden is also home to SF Anytime, an SVOD service (part of the Albert Bonnier Group) which targets other Nordic countries. Netflix became available in Sweden alongside the launch of the service in Denmark, Finland and Norway in October 2012.

The main legal basis for broadcasting in Sweden is the Radio and Television Act from 2010.

The Swedish Broadcasting Authority supervises television and radio broadcasting, including on-demand services and teletext. It is also responsible for licenses, fees and registration for radio and television.



Sofia Helin and Dag Malmberg in *The Bridge* - Season Three which received TV Programming support from Creative Europe (Photo: Carolina Romare)



SVERIGES TELEVISION (SVT)

SVT is the Swedish public service broadcaster financed by a compulsory fee. They had 64 hours of broadcasting per day on all their channels. 26 % of the programming is fiction.

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SWEDEN



DISCOVERY NETWORKS SWEDEN

Discovery Networks Sweden – Channels showing drama are Kanal 5, Kanal 9 and Kanal 11. Kanal 5 has an entertainment, feature film and series profile. Kanal 9 targets the male viewer with a mix of high quality drama, sports and feature films. Kanal 11 targets the female viewer with a mix of drama, glamour and relationships.

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SWEDEN

TV4 / C MORE

TV4 Group is Sweden's largest commercial TV network, with a range of channels and TV services such as TV4, Sjuan, TV12 and online service TV4 Play. Pay tv operator C More is Sweden's fastest growing streaming service. Both TV4 and C More is part of Bonnier Broadcasting, with focus on delivering the best local and international content to Swedish audiences.

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SWEDEN



TV3 / TV6 / TV8 / TV10

TV3 started its transmissions in 1987 and was the first commercial channel in Sweden. It has an entertainment and feature film profile. TV6 has a profile of entertainment, sports and fact shows. TV8 has a focus on series and lifestyle. TV10 focuses on sports and documentaries. These channels are all owned by Viasat which is part of MTG (Modern Times Group).

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SWEDEN

MODERN TIMES GROUP

MTG UK LTD

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SWEDEN

TURNER NORDIC AND BALTIC

Turner Broadcasting System International operates versions of core TBS brands, including CNN, TNT, Cartoon Network and Turner Classic Movies, as well as country- and region-specific networks and businesses in Latin America, EMEA and the Asia Pacific region. It runs Pay- and Free-TV-channels, as well as Internet-based services and is a commercial partner with various third-party media ventures; it teams with Warner Bros. and HBO to leverage Time Warner's global reach. Currently, TBS operates more than 130 channels in more than 30 languages in some 200 countries around the world. Turner Broadcasting System International, Inc. is a subsidiary of Turner Broadcasting System, Inc. (TBS), a Time Warner company.

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HBO NORDIC

HBO Nordic was founded in 2012 and offers a subscription Video on Demand Service, directly to consumers in Sweden, Norway, Finland and Denmark. The channel also distributes brand new premieres from other major broadcasters as well as an exciting selection of movies from Hollywood, international film studios, local distributors and independent companies. HBO Nordic is owned by Home Box Office, Inc., a subsidiary of Time Warner Inc.

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SWEDEN

SWITZERLAND

Switzerland is a federation made up of 26 cantons and has four national languages: French, German, Italian and Romansch. This is reflected in the organisation of the audiovisual landscape, with French, German and Italian channels having a major presence on the Swiss market. However, the different language markets are still dominated by the public channels. The public service broadcaster SRG SSR provides, through its seven operating units, seven television channels (three in German, two in French and two in Italian) and seventeen radio stations. The third German-language television channel, SFInfo, was granted authorisation in November 2011 to broadcast information in French and Italian, the aim of this being to strengthen contacts between the country's different language regions. This also complies with the measures that SRG SSR is required to take in order to comply with the programme remit that it has been given pursuant to section 24 of the Federal Radio and Television Broadcasting Act (Loi fédérale sur la radio et la télévision – LRTV) of 24 March 2006. According to this provision, SRG SSR must in particular promote understanding, cohesion and contacts between the different parts of the country, their language communities, their cultures and their social groups. It must also take account of the country's specific features and the needs of the cantons. Programmes in Romansch, the fourth official language, are included in the programming of the French-language channels.

The main TV channels are operated by the public broadcaster SRG SSR and serve the four different languages spoken in Switzerland. SRF 1, SRF Zwei and SRF info (SRF) are the channels aimed at the German-speaking areas, RTS Un and RTS Deux

(RTS) are those aimed at the French-speaking area, RSI LA 1 and RSI LA 2 (RSI) are aimed at the Italian-speaking area and Televisiun Rumantscha (RTR) is aimed at the Romansh-speaking area.

In each region private foreign groups rank second; the RTL Group and ProSiebenSat.1 Media AG in the German-speaking area, Groupe TF1 in the French-speaking area and Mediaset in the Italian-speaking part.

Switzerland is home to 53 on-demand audiovisual services, of which 37 are VOD services. The main VOD services established are those operated by Swisscom (Teleclub and SwissTV on Demand), My Prime by UPC Cablecom and Watch4 available in Switzerland, Germany and Austria. The free VOD service Viewster is also established in Switzerland and available throughout Europe. In addition to UPC Cablecom and Swisscom, Netflix is a main player on the Swiss SVOD market with 236 000 subscribers at the end of 2015 as estimated by Digital TV Research. Besides, there is www.lekino.ch, an arthouse VOD service which is part of the European Filmin alliance and EuroVOD group.

The regulatory authority is the Bundesamt für Kommunikation / Office Fédéral de la communication / Ufficio federale delle comunicazioni.

The governing law regarding the audiovisual sector is the RTVA Federal Act on Radio and Television (SR 784.40) of 24 March 2006.



Carlos Leal in *Gotthard* by Urs Egger, produced by Zodiac Pictures, SRF, ZDF, ORF, MMC
Zodiac, Wilma Film



RSI

RSI is part of the group SRG SSR, the Swiss public broadcaster. The Italian unit operates two channels: LA 1 and LA 2. LA 1 is a full service channel aimed at a broad audience. LA 2 is a complementary channel with a focus on sport. There are also children's programs and repeats of news programs from LA 1. The drama editorial line looks for strong and realistic fiction stories. RSI also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions, both for cinema and television.

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SWITZERLAND

RTS

RTS is the national French speaking language public service channel in Switzerland. It operates two channels. RTS 1 is a mainstream channel. The prime-time schedule showcases its major in-house productions. RTS 2 complements RTS 1 with sports coverage, documentaries, arts programming and a special strand for young people. RTS also participates in foreign productions involving a Swiss co-producer within the "Pacte", an agreement aiming to support independent productions both for cinema and television.

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SWITZERLAND

SRF

SRF is the German language public service channel in Switzerland and operates three television channels. SRF 1 – a high-quality schedule of news and current affairs, light entertainment and arts, with a large proportion of in-house productions – reflects the complex reality of life in culturally diverse Switzerland. SRF zwei gives heavy emphasis to sport, feature films and series. The schedule is aimed more at a younger audience. SRF info offers viewers time-shifted viewing with running repeats of the latest information-based formats - news, sport and the arts. SRF participates in foreign productions involving a Swiss co-producer within the “Pacte”, an agreement aiming to support independent productions both for cinema and television.

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SWITZERLAND



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SWITZERLAND



UNITED KINGDOM

There are five significant groups on the British market, with the BBC and ITV channels together commanding 59% of the daily market share in 2014.

The BBC Public Service Broadcaster has more than 20 national public channels with a further 20 regional and local windows. BBC Worldwide includes BBC World News and a range of channels that target Scandinavia, Poland and other European countries (BBC Brit, BBC Earth etc.). BBC Worldwide has shares in the UKTV thematic channels, in a joint venture with Scripps TV.

ITV Plc. holds 13 of the 15 Channel 3 licences in the UK after years of take-overs. The purchase of the UTV channels in October 2015 implies that just the two Scottish licences of STV are independently owned. Other significant broadcasters include Channel 4, Sky Plc. (21st Century Fox) - each with around 10% audience share - and Channel 5 with 6% in 2014.

The UK remains the place of establishment for a very large number of European TV brands that target the rest of Europe (many of which are US channel brands).

The UK has also developed as a significant place of establishment for on-demand audiovisual services, again including many US brands that target other markets. In the subscription VoD (SVOD) segment, Amazon Prime and Netflix dominate the market (more than 90% of the SVOD market in volume), with Sky's Now TV being a third but less significant player.

In the digital media landscape, the UK ranks as one of the most developed and advanced countries worldwide according to the 2015 OFCOM Communications Market Report. In the United Kingdom, the media sector is legislated via the Communications Act of 2003. This act established the converged regulator Ofcom, which has the responsibility for the regulation of the audiovisual and communications sectors.

The public service broadcasters are governed by various boards and trusts. Ofcom reports on the extent to which the overall public service remit is met.

For the BBC, its purpose and remit are outlined in the Royal Charter, an agreement with the government.

Channel 4 is a publicly-owned, commercially-funded public service broadcaster. S4C is the public service channel in the Welsh language and governed by the S4C Authority. The broadcaster's funding and the use of the television licence fee are supervised by the BBC Trust.

From 2010 to 2015, on-demand audiovisual services were regulated by the Authority for Television on Demand (ATVOD), a co-regulator assigned by the Ofcom. At the end of 2015, the regulation of on-demand services was taken over by Ofcom.



Hinterland, 2014 – Production company: Fiction Factory



Jamaica Inn, 2014 – Production company: Origin Pictures



BBC

The BBC is the largest broadcasting organisation in the world. Its mission is to enrich people's lives with programmes that inform, educate and entertain. It is a public service broadcaster, established by a Royal Charter and funded by the licence fee that is paid by UK households. The BBC uses the income from the licence fee to provide services including 8 national TV channels plus regional programming, 10 national radio stations, 40 local radio stations and an extensive website. BBC World Service broadcasts to the world on radio, on TV and online, providing news and information in 32 languages. It is funded by a combination of the licence fee, limited advertising and the profits of BBC Worldwide Ltd. The BBC also has a commercial arm, BBC Worldwide whose profits are returned to the BBC for investment in new programming and services. And in April 2017 the BBC launched BBC Studios Ltd as a wholly owned subsidiary producing programmes for the BBC and other UK broadcasters, and generating financial returns for licence fee payers.

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UNITED KINGDOM



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UNITED KINGDOM



BBC WALES

BBC Cymru Wales (also known as English: BBC Wales or Welsh: BBC Cymru) is a division of the British Broadcasting Corporation for Wales. Based at Broadcasting House in the Llandaff area of Cardiff, it directly employs over 1200 people, and produces a broad range of television, radio and online services in both the Welsh and English languages. Outside London, BBC Wales is the largest BBC production centre in the United Kingdom, partly due to its additional slate of Welsh language programmes for BBC Radio Cymru and the Welsh language television channel S4C.

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UNITED KINGDOM



BBC NORTHERN IRELAND

BBC Northern Ireland (Irish: BBC Thuaisceart Éireann / Ulster Scots: BBC Norlin Airlann) is the main public service broadcaster in Northern Ireland. The organisation is one of the three national regions of the BBC, together with BBC Scotland and BBC Wales. Based at Broadcasting House, Belfast, it provides television, radio, online and interactive television content. BBC Northern Ireland currently employs 700 people, largely in Belfast.

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UNITED KINGDOM



BBC SCOTLAND

BBC Scotland (Gaelic: BBC Alba) is a constituent part of the British Broadcasting Corporation, the publicly-funded broadcaster of the United Kingdom. It is, in effect, the national broadcaster for Scotland, having a considerable amount of autonomy from the BBC's London headquarters, and is run by the BBC Trust, who are advised in Scotland by the Audience Council Scotland. Its Scottish headquarters and studios are at BBC Pacific Quay on the south bank of the River Clyde, beside the STV headquarters and the Glasgow Science Centre.

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UNITED KINGDOM

CHANNEL 4

Channel 4 is a public service for information, education and entertainment. 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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UNITED KINGDOM

CHANNEL 5

Channel 5 launched as Britain's fifth public service channel in March 1997. It reaches 4 in 5 of the UK viewing public each month with a broad mix of popular content including Suspects, Big Brother and Neighbours. Sister channels 5*, 5USA and Spike complement Channel 5 with a mix of original commissions and acquired entertainment and U.S. drama, while Demand 5 is a free catch service available across multiple platforms and devices. In 2014, Channel 5 was the only major commercial free-to-air network to grow audience share across the most valuable TV audiences. Since September 2014, Channel 5 has been owned by Viacom International Media Networks.

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UNITED KINGDOM

The logo for ITV, consisting of the letters 'ITV' in a bold, black, sans-serif font.

ITV is the biggest commercial television network in the UK, broadcasting the most talked about television and making a major contribution to the UK's culture, economy and communities. The ITV Network is made up of 15 regional licences, providing television to viewers across the UK. 11 of the licences in England and Wales are owned by ITV Plc, formed in 2004 following the merger of Carlton and Granada. SMG owns the two Scottish licences, Scottish Television and Grampian; UTV and Channel Television own the licences for Northern Ireland and the Channel Islands respectively.

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UNITED KINGDOM



SKY

Sky One is an entertainment channel (with simulcast in HD). In addition to providing a television satellite service to subscribers (over 9.3 million households at the end of March 2011), BSKYB also has a portfolio of TV channels: Sky1, Sky Living, Sky Atlantic, Sky Arts 1 & Sky Arts 2, Sky 3D and Challenge.

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UNITED KINGDOM



UKTV

UKTV is a major industry player and one of the most important and successful multi-channel providers in the UK. Formed in 1997, it is an independent commercial joint venture, between Scripps Networks Interactive, Inc. (SNI) and BBC Worldwide, the commercial arm of the BBC. Attracting over 42 million viewers each month, the network offers a broad range of quality programming across its entertainment, lifestyle and factual offerings - Watch, GOLD, Dave, Alibi, Eden, Drama Yesterday, Home, Really and Good Food. The success of UKTV is based on its programming including award-winning shows from the BBC and an increasing number of original commissions and acquisitions. The network embraces technology to deliver inspired channels to audiences through Freeview, Sky, Virgin Media, BT, TalkTalk, YouView and UKTV Play, and distributes its highly valued original programmes to 200 territories.

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UNITED KINGDOM



S4C

S4C has a statutory obligation to broadcast to 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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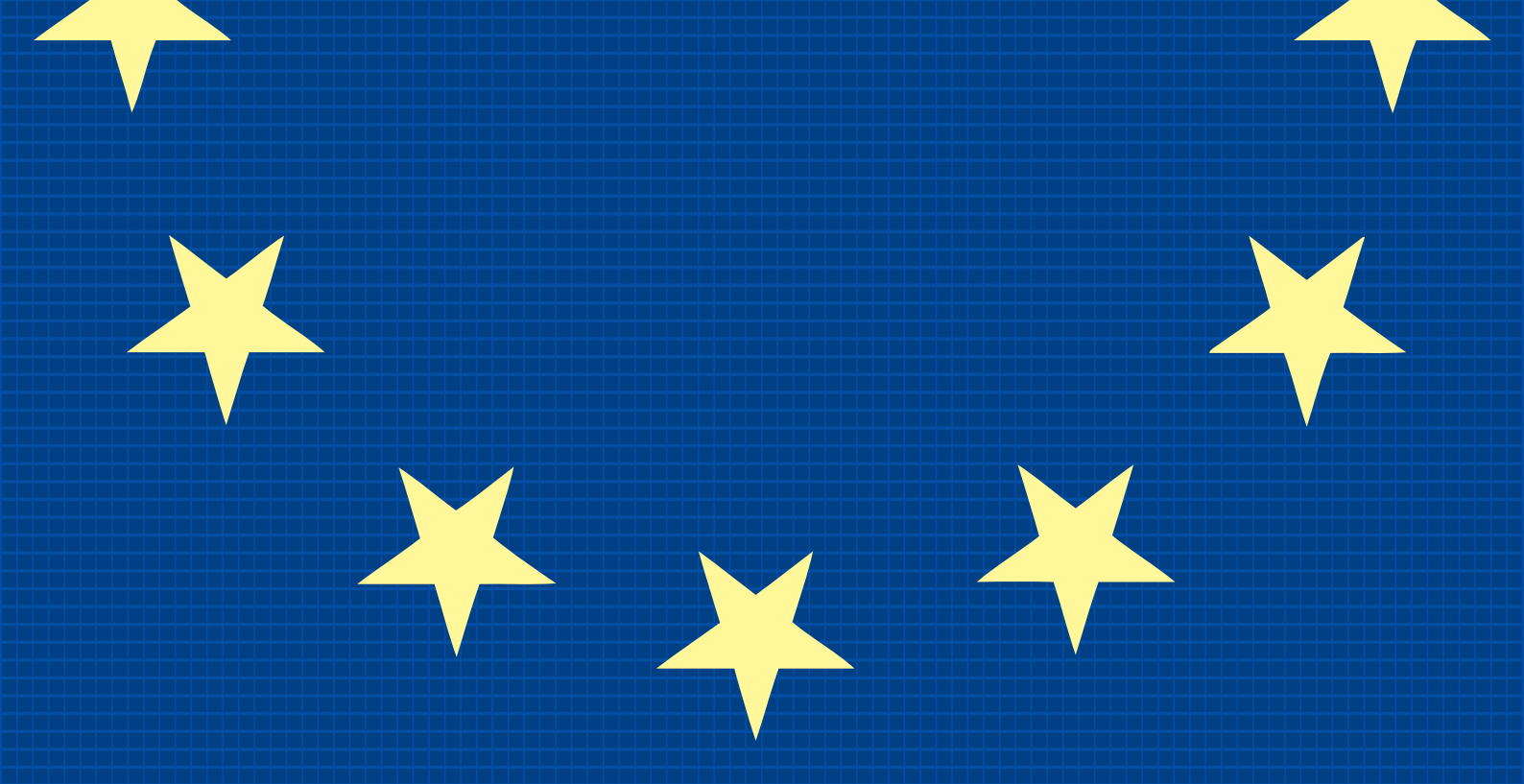
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